

AGENDA

REGULAR SCHOOL BOARD MEETING

GADSDEN COUNTY SCHOOL BOARD
MAX D. WALKER ADMINISTRATION BUILDING
35 MARTIN LUTHER KING, JR. BLVD.
QUINCY, FLORIDA

June 24, 2014

6:00 P.M.

THIS MEETING IS OPEN TO THE PUBLIC

1. CALL TO ORDER
2. OPENING PRAYER
3. PLEDGE OF ALLEGIANCE
4. RECOGNITIONS

ITEMS FOR CONSENT

5. REVIEW OF MINUTES – **SEE ATTACHMENT**
 - a. May 27, 2014, 4:30 p.m. – School Board Workshop
 - b. May 27, 2014, 6:00 p.m. - Regular School Board Meeting
 - c. June 3, 2014, 4:00 p.m. – Student Hearing
 - d. June 3, 2014, 5:00 p.m. – Student Hearing
 - e. June 3, 2014, 6:00 p.m. – Student Hearing

ACTION REQUESTED: The Superintendent recommends approval.

6. PERSONNEL MATTERS (resignations, retirements, recommendations, leaves of absence, terminations of services, volunteers, and job descriptions) **SEE PAGE #7**
 - a. Personnel 2013 – 2014
ACTION REQUESTED: The Superintendent recommends approval.
 - b. Personnel 2014 – 2015
ACTION REQUESTED: The Superintendent recommends approval.

7. BUDGET AND FINANCIAL TRANSACTIONS

- a. Budget Amendment Number Thirteen - **SEE PAGE #12**

Fund Source: 420 (Federal) Funds
Amount: \$825.68

ACTION REQUESTED: The Superintendent recommends approval.

- b. Budget Amendment Number Fourteen – **SEE PAGE #41**

Fund Source: 391 (Capital Outlay Other) Funds
Amount: \$71,700.00

ACTION REQUESTED: The Superintendent recommends approval.

- c. School Board Truth In Millage (TRIM) Timetable – **SEE PAGE #46**

Fund Source: N/A
Amount: N/A

ACTION REQUESTED: The Superintendent recommends approval.

8. AGREEMENT/CONTRACT/PROJECT APPLICATIONS

- a. First 12 Month Extension on Capital City Bank Construction Loan
SEE PAGE #50

Fund Source: Capital Funds
Amount: Two bi-annual payments due November 1, 2014 and
May 1, 2015 totaling \$371,543.67

ACTION REQUESTED: The Superintendent recommends approval.

- b. Food Service Purchases with vendor greater than \$15,000 - **SEE PAGE #55**

Fund Source: 410 Food Service
Amount: Increase the purchase order by another \$4,500

ACTION REQUESTED: The Superintendent recommends approval.

- c. Health Insurance Contract for 2014 - 2015 – **SEE PAGE #59**

Fund Source: All Funds with Payroll
Amount: Varies by Type of Coverage

ACTION REQUESTED: The Superintendent recommends approval.

- d. New Optional Employee Benefits – **SEE PAGE #60**

Fund Source: Not applicable – cost is bore by the employee
Amount: Information for employee selection amounts is included in the
attached vendor

ACTION REQUESTED: The Superintendent recommends approval.

- e. Rate Increase for NEOLA - **SEE PAGE #89**
Fund Source: General Revenue
Amount: As Invoiced
ACTION REQUESTED: The Superintendent recommends approval.
- f. Letter of Agreement Between GCCTA and GESPA and GCSB
SEE PAGE #92
Fund Source: N/A
Amount: N/A
ACTION REQUESTED: The Superintendent recommends approval.
- g. Agreement Between Cumberland Therapy Services, LLC and Gadsden County School Board – **SEE PAGE #95**
Fund Source: IDEA
Amount: \$61.00 per hour
ACTION REQUESTED: The Superintendent recommends approval.
- h. Contracted Services with Speech/Language Pathologist Joy Scharein & The Gadsden County School Board - **SEE PAGE #98**
Fund Source: FEFP dollars
Amount: \$50.00 per hour
ACTION REQUESTED: The Superintendent recommends approval.
- i. The School Board of Gadsden County, Contract with Independent Contractor Janice M. Gilchrist - **SEE PAGE #104**
Fund Source: IDEA dollars
Amount: \$40.00 (per hour for actual hours worked)
ACTION REQUESTED: The Superintendent recommends approval.
- j. Agreement Between the Gadsden County Public Schools and Milestones Occupational Therapy Services, LLC; Makesha Bush, OTR/L
SEE PAGE #108
Fund Source: FEFP dollars
Amount: \$58.00 (per hour for actual hours worked)
ACTION REQUESTED: The Superintendent recommends approval.
- k. Cooperative Agreement for Inter-County Transfer of Exceptional Students Between Leon County School Board and Gadsden County School Board
SEE PAGE #113
Fund Source: State FTE Funds
Amount: (determined by formula)
ACTION REQUESTED: The Superintendent recommends approval.

- l. Agreement Between The School Board of Gadsden County Public Schools and INVO Healthcare Associates, Inc. – **SEE PAGE #118**
 Fund Source: FEFP dollars
 Amount: \$58.00 (per hour for actual hours worked)
 ACTION REQUESTED: The Superintendent recommends approval.
 - m. Agreement Between The School Board of Gadsden County and The School Board of Seminole County (Medicaid Administrative Claiming) **SEE PAGE #124**
 Fund Source: Medicaid
 Amount: \$9.00 per random sampling form
 ACTION REQUESTED: The Superintendent recommends approval.
 - n. Agreement Between State of Florida Department of Education, Division of Vocational Rehabilitation (DOE/DVR) and Gadsden County School District **SEE PAGE #131**
 Fund Source: DOE/DVR/General Funds
 Amount: \$62,960.00 (not to exceed)
 ACTION REQUESTED: The Superintendent recommends approval.
9. **STUDENT MATTERS – SEE ATTACHMENT**
- a. Student Expulsion – See back-up material
 Case #70-1314-0051
 ACTION REQUESTED: The Superintendent recommends approval.
 - b. Student Transfers – See back-up material
 ACTION REQUESTED: The Superintendent recommends approval.
10. **BIDS / SCHOOL FACILITY/PROPERTY**
- a. 2014 Fuel Bid for 2014 – 2015 School Year – Bid #1415-01 **SEE PAGE #158**
 Fund Source: Transportation Department
 Amount: \$800,000.00
 ACTION REQUESTED: The Superintendent recommends approval.
 - b. Architect Contract – James A. Shanks School Clinic – **SEE PAGE #162**
 Fund Source: HRSA Grant
 Amount: \$17,800.00
 ACTION REQUESTED: The Superintendent recommends approval.

- c. Architect Proposal – George Munroe Elementary Modular Health Building
SEE PAGE #167

Fund Source:HRSA Grant
Amount: \$9,095.00

ACTION REQUESTED: The Superintendent recommends approval.
- d. Architect Proposal – Havana Middle School Modular Health Building
SEE PAGE #172

Fund Source:HRSA Grant
Amount: \$9,095.00

ACTION REQUESTED: The Superintendent recommends approval.
- e. Full Service HVAC/Refrigeration Maintenance & Repair Contract for East Gadsden High School - **SEE PAGE #177**

Fund Source:110
Amount: \$76,924.00

ACTION REQUESTED: The Superintendent recommends approval.
- f. Full Service HVAC/Refrigeration Maintenance & Repair Contract for West Gadsden High School - **SEE PAGE #181**

Fund Source:110
Amount: \$59,756.00

ACTION REQUESTED: The Superintendent recommends approval.
- g. Continuation of Bid #1213-19 Grounds Maintenance Group #5
SEE PAGE #185

Fund Source:110
Amount: \$18,400.00

ACTION REQUESTED: The Superintendent recommends approval.
- h. Continuation of Agreement with McCall Service for Pest Control
SEE PAGE #188

Fund Source:110
Amount: \$22,000.00

ACTION REQUESTED: The Superintendent recommends approval.
- i. Solid Waste Collection Agreement with Waste Pro – **SEE PAGE #192**

Fund Source:110
Amount: \$110,697.68

ACTION REQUESTED: The Superintendent recommends approval.

ITEMS FOR DISCUSSION

11. EDUCATIONAL ITEMS BY THE SUPERINTENDENT
12. SCHOOL BOARD REQUESTS AND CONCERNS
13. ADJOURNMENT

The School Board of Gadsden County



"Building A Brighter Future"

Reginald C. James
SUPERINTENDENT
OF SCHOOLS

35 MARTIN LUTHER KING, JR. BLVD.
QUINCY, FLORIDA 32351
TEL: (850) 627-9651
FAX: (850) 627-2760
www.gcps.k12.fl.us

June 24, 2014

The School Board of
Gadsden County, Florida
Quincy, Florida 32351

Dear School Board Members:

I am recommending that the attached list of personnel actions be approved, as indicated. I further recommend that all appointments to grant positions be contingent upon funding.

Item 6A Instructional and Non-Instructional Personnel 2013/2014
Item 6B Instructional Personnel 2014-2015

The following reflects the total number of full-time employees in this school district for the 2013/2014 school term, as of June 24, 2014.

<u>Description Per DOE Classification</u>	<u>DOE Object#</u>	<u>#Employees June 2014</u>
Classroom Teachers and Other Certified Administrators	120 & 130	433.00
Non-Instructional	110	45.00
	150, 160, & 170	<u>378.00</u>
		856.00

Sincerely,

Reginald C. James
Superintendent of Schools

Audrey Lewis
DISTRICT NO. 1
HAVANA, FL 32333
MIDWAY, FL 32343

Judge B. Helms, Jr.
DISTRICT NO. 2
QUINCY, FL 32351
HAVANA, FL 32333

Isaac Simmons, Jr.
DISTRICT NO. 3
CHATTAHOOCHEE, FL 32324
GREENSBORO, FL 32330

Charlie D. Frost
DISTRICT NO. 4
GRETNA, FL 32332
QUINCY, FL 32352

Roger P. Milton
DISTRICT NO. 5
QUINCY, FL 32351

BOARD MEETS FOURTH TUESDAY OF EACH MONTH
EQUAL OPPORTUNITY EMPLOYER

AGENDA ITEM 6A, INSTRUCTIONAL AND NON INSTRUCTIONAL PERSONNEL 2013/2014

REQUESTS FOR LEAVE, RESIGNATION, TRANSFERS, RETIREMENTS, TERMINATIONS OF EMPLOYMENT:

RESIGNATION

<u>Name</u>	<u>Location</u>	<u>Position</u>	<u>Effective Date</u>
Berry, Charles	Transportation	Bus Driver	05/02/2014
Bridges, Sonja	JASMS	Technology Training Spec.	05/30/2014
Cloud, Shanqueria	HMS	Teacher	06/04/2014
Hatten, Ellanor	WGHS	Custodial Asst.	06/26/2014
Hilbig, Kimberly	CES	Teacher	06/04/2014
Jones, Ryan	GWM	Teacher	06/04/2014
McBride, Alonza	Transportation	Bus Driver	05/30/2014
McDonald, Glenda	GEMS	Teacher	06/04/2014
Potter, Bridget	JASMS	Teacher	06/04/2014
Ranew, Dorothy	Maintenance	Secretary	06/20/2014
Robinson, Earl	JASMS	Teacher	06/04/2014
Stephens, Carolyn	GWM	Teacher	06/04/2014
Tshabe, Crystal	JASMS	Teacher	06/04/2014
Thigpen, Krystal	SJES	Teacher	06/04/2014
West-White, Clarissa	GWM	Teacher	06/04/2014

RETIREMENTS

<u>Name</u>	<u>Location</u>	<u>Position</u>	<u>Effective Date</u>
Green, Carolyn	SJES	Teacher	06/04/2014
Green, Charles	SJES	Teacher	06/04/2014
Hoatson, William	JASMS	Teacher	06/04/2014
Toussaint, John**	CPA	Teacher	06/04/2014

DROP RETIREMENTS

<u>Name</u>	<u>Location</u>	<u>Position</u>	<u>Effective Date</u>
Campbell, Delma	EGHS	Teacher	06/30/2014
Reilly, Noreen	GBES	Teacher	06/30/2014
Thomas, Shirlean *	EGHS	Guidance Counselor	06/30/2014
White, Don*	CPA	Teacher	06/30/2014

*Went to May 27, 2014 as regular retirement, should be DROP Retirement.

**went to May 27, 2014 as DROP retirement, should be Regular Retirement.

AGENDA ITEM 6B, INSTRUCTIONAL AND NON INSTRUCTIONAL PERSONNEL 2014/2015**Non-Instructional**

<u>Name</u>	<u>Location</u>	<u>Position</u>	<u>Effective Date</u>
Butler, Martha	District	Administrative Asst.	07/01/2014
Knight, Sarah	District	Program Specialist	07/01/2014

TRANSFERS

<u>Name</u>	<u>Location/Position Transferring From</u>	<u>Location/Position Transferring To</u>	<u>Effective Date</u>
McClurkin, Willie	EGHS/Guidance Counselor	GRES/Teacher	08/11/2014

District Personnel

<u>Permanent</u>	<u>Location</u>	<u>Position</u>
Farlin, Anthony	Media/Technology	Technician
Francis, Lealer	ESE	Secretary
Johns, Peggy	District	Receptionist

District Personnel

<u>Annual</u>	<u>Location</u>	<u>Position</u>
Akins, Cedric	Media and Technology	Technician
Akins, Deborah	District	Secretary
Alday, Shirley	Business and Finance	Account Clerk
Anderson, Millie	ESE	Program Specialist
Beamon, Patricia	Media/Technology	Administrative Assistant
Black, Rutha	Media/Technology	Programmer
Brown-Byrd, Stephanie	Business and Finance	Account Clerk
Bulger, Sharon	Personnel	Secretary, Staff Development
Byrd, Lakeisha	ESE	School Psychologist
Cherry, Avondika	ESE	Program Specialist
Daniels, Anitria	ESE	Staff Assistant
Davis, Mary	District	Administrative Assistant
Davis, Melanie	School Food Service	Coordinator, SFS
Ellison, Cheryl	District	Administrative Assistant
Engling, Diana	Business and Finance	Account Clerk
Geathers, Amanda	ESE	School Psychologist
Griffin-Rittman, Benita	ESE	Program Specialist
Hale, Desmona	Media/Technology	System Support Specialist
Hall, Laurie	Business and Finance	Account Clerk
Hannah, Denise	Parent Services	Volunteer Coordinator
Harris, Kesandra	ESE	Program Specialist
Henry, Felita	ESE	School Psychologist
Howell, Amy	Business and Finance	Personnel Specialist
Hutley, Carlos	Media/Technology	Technician
Jackson, Rolanda	Parent Services	Visiting Teacher
James, Betty	ETO	ETO Program Specialist
James, Bruce	Business and Finance	Inventory Control Specialist
Kent, Joseph	Media/Technology	Technology Training Specialist
Kimble, Joann	Federal Programs	Program Assistant
Mathew-Nelloms, Dionne	ETO	ETO Program Specialist
Martin, Dana	Federal Programs	Administrative Assistant
McCall, Wanda	Business and Finance	Account Clerk
McKinnon, Caroline	District	Coordinator, Assessment/Related
McGriff-West, Anna	Business and Finance	Account Clerk
Mills, Cynthia	ESE	Visiting Teacher
Milton, Paula	School Food Service	Coordinator, SFS
Riggins, Larissa	Media/Technology	Technician
Robinson, Sandra	Personnel	Human Resources Specialist
Sapp, Angela	Instructional K-12	Coordinator, Race to the Top
Sierra, Nancy	Federal Programs	Staff Assistant
Stevens, James	Business and Finance	Custodian
Suber, Angela	ESE	Computer Operator
Thomas, Jeannette	Federal Programs	Supervisor, Title I

Cont'd

AGENDA ITEM 6B, INSTRUCTIONAL AND NON INSTRUCTIONAL PERSONNEL 2014/2015

Thomas Johnny	Media/Technology	Network Coordinator
Thomas, Kenneth	Media/Technology	Technology Training Specialist
Tillman, Montoyia	Federal Program	Inventory Intake Specialist
Trombley, Calvin	ETO	ETO Program Specialist
Ward, Kristy	ESE	Program Specialist
Williams, Justina	ESE	Speech/Language Pathologist
Youmans, Darlean	Media/Technology	Coordinator, Technology

Cont'd

AGENDA ITEM 6B, INSTRUCTIONAL AND NON INSTRUCTIONAL PERSONNEL 2014/2015

Administration

Beckwith, Shaia
Bulger, Evonski
Clary, Curlie
Davis, Allysun
Denson, Valencia
Dixon, Abbye
Dowdell, Keith
Ellis, Juanita
Ferree, Kimberly
Franklin, Michael
Frazier-Lee-Larhonda
Gaines, Rebecca
Gay, Gerald
Grant, Myra
Harden, Carolyn
Hightower, Pink
Hopkins, Beatrice
Jackson, Delshuana
Jackson, Sheila
Jackson, Sylvia
King, Melanie
Kirkland, Earnest
Pitts, Stephen
Pouncey, Kathryn
Rackley, Debra
Raynak, Rose
Richardson, Curtis
Riggins, Sandra
Roberts, Melvin
Robinson, Lisa
Sapp, Angela
Shepard, Robert
Smith, Rosalyn
Starling, Erica
Stokes, Maurice
Taylor, Sherrie
Thomas, Sharon
Walker, Ida
Williams, Marshall
Williams, Parrish
West, Pauline
Wiggins, Sheantika

Location

District
Gadsden Technical Institute
Stewart Street Elem.
George W. Munroe Elementary
Chattahoochee Elem. School
St. John Elementary School
Carter-Parramore Academy
James A. Shanks Middle School
Business and Finance
Gretna Elementary School
Gadsden Elementary Magnet School
Gadsden Central Academy
Transportation
Havana Elementary School
Head Start/Pre-K
Personnel
District
Havana Middle School
Greensboro Elementary School
Gadsden Technical Institute
Business and Finance
East Gadsden High School
Greensboro Elementary School
ESOL
District
Federal Programs
Instructional K-12
West Gadsden High School
East Gadsden High School
Stewart Street Elementary School
Instructional K-12
Facilities
District
Gretna Elementary
St. John Elementary School
District
ESE
West Gadsden High School
District
Havana Elementary
Carter-Parramore Academy
District

Position

Coordinator, Info. Services
Assistant Principal
Assistant Principal
Interim Principal
Principal
Assistant Principal
Assistant Principal
Principal
Asst. Supt. Business and Finance
Interim Principal
Interim Principal
Assistant Principal
Director, Transportation
Assistant Principal
Coordinator
Director, Personnel/ Staff Development
Director, Americorps
Principal
Assistant Principal
Director Vocational/Adult Ed.
Assistant Comptroller
Assistant Principal
Principal
Program Specialist
Director, Drop Out Prevention
Director
Coordinator, Race to the Top
Assistant Principal
Principal
Principal
Coordinator, Race to the Top-Science
Director, Facilities
Deputy Supt, Academic Services
Assistant Principal
Principal
Coordinator, Community in Schools
Director, ESE
Principal
21st Century Coordinator
Interim Principal
Principal
Director, Media/Technology

PROFESSIONAL SERVICES

Bridges-Bright, Gail
Francis, Carolyn
Key, Elijah
Riley, Cynthia
Robinson, Calvin

CONTINUING

Jenkins, Robin

Cont'd

AGENDA ITEM 6B, INSTRUCTIONAL AND NON INSTRUCTIONAL PERSONNEL 2014/2015

Maintenance

Permanent

Britt, Tony
Cox, David
Harris, Terry
McIntyre, Harold
Pride, Michael
Smith, Shannon
Smith, William
Tyus, James
Yon, Dennis

Maintenance

Annual

Burdick, Johnnie
Gray, Dustin
Lewis, Kimmie
Peters, John
Riley, Johnny
Rutten, Mary
Sherman, Ricky

Custodians

Permanent

Betsey, Antwan
Fitzgerald, Dorlean
Hatten, Henry
Johnson, William
Jones, Marshall
Kirkland, Juan
Lee, Willie
Miller, Raymond
Moore, Joann
McCall, Isaac
Pete, John
Reed, Albert
Robinson, Lamar
Oliver, Clifford
Turner, Michael

Transportation

Permanent

Dorsey, James
Gleaton, Sandra
Lewis, Rogers
Moore, H. Gerard
Rodriquez, Carlos
Shepherd, James
Taylor, Jimmy

PreK

Annual

Alvarez, Michelle
Austin, Cathy
Jackson, Christa
Jones, Curtis

School Level Office Managers

Secretaries – Annual

Barksdale, Melissa
Bryant, Cametra
Elias, Irene
Enzor, Blondell
Harley, Donzellar
Harrell, Frances
Herring, Regina
Kelly, Deborah
Lanier, Kathleen
Malone, Frankie
Perkins, Lakysa
Rittman-Jackson, Debra
Smith, Barbara
Thomas, Leneatris
Thomas, Tawanda

PreK

Annual

Alvarez, Michelle
Austin, Cathy
Jackson, Christa
Jones, Curtis

GTI

Annual

Atkins, Shelia
Drake, Doris
Dupont, Natalie
Flowers, Tatia
Nesmith, Kimblin
Price, Amelia

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 7a

DATE OF SCHOOL BOARD MEETING: June 24, 2014

TITLE OF AGENDA ITEMS: Budget Amendment Number Thirteen

DIVISION: Finance Department

PURPOSE AND SUMMARY OF ITEMS:

Board approval is requested for this budget amendment that increases the roll forward budget for Title I. This budget amendment also moves funds by function and object as allowable under FDOE Green Book to reflect expenditures.

FUND SOURCE: 420 (Federal) Fund

AMOUNT: \$ 825.68

PREPARED BY: Kim Ferree

POSITION: Assistant Superintendent for Business Services

Gadsden County School Board
 Estimated Revenue
 Budget Amendment Thirteen

FUND 420 REVENUE OBJECT	BEGINNING ESTIMATED REVENUE 5/28/2014	BUDGET AMENDMENT NUMBER THIRTEEN	ENDING ESTIMATED REVENUE 6/11/2014
199	\$ 3,137,733.83	\$ -	\$ 3,137,733.83
201	\$ 169,518.40	\$ -	\$ 169,518.40
225	\$ 499,328.34	\$ -	\$ 499,328.34
226	\$ 50,468.99	\$ -	\$ 50,468.99
230	\$ 2,006,084.44	\$ -	\$ 2,006,084.44
240	\$ 5,389,917.64	\$ 825.68	\$ 5,390,743.32
251	\$ -	\$ -	\$ -
270	\$ -	\$ -	\$ -
290	\$ 717,768.23	\$ -	\$ 717,768.23
299	\$ -	\$ -	\$ -
TOTALS	\$ 11,970,819.87	\$ 825.68	\$ 11,971,645.55

**Gadsden County School Board
420 (Federal) Fund Appropriations
Thirteen**

420 FUND					
FUNCTION/ OBJECT		BUDGET BALANCE 5/28/2014	BUDGET AMENDMENT NUMBER THIRTEEN		BUDGET BALANCE
5100	100	\$ 535,361.38	\$ (29,677.70)	\$	505,683.68
	200	\$ 103,560.24	\$ 7,470.00	\$	111,030.24
	300	\$ 456,834.54	\$ (4,750.00)	\$	452,084.54
	500	\$ 702,680.68	\$ (9,048.88)	\$	693,631.80
	600	\$ 7,979.37	\$ (4,000.00)	\$	3,979.37
	700	\$ 2,061.00	\$ -	\$	2,061.00
FUNCTOTAL		\$ 1,808,477.21	\$ (40,006.58)	\$	1,768,470.63
5200	100	\$ 628,303.55	\$ 7,100.00	\$	635,403.55
	200	\$ 168,130.69	\$ 2,644.00	\$	170,774.69
	300	\$ 294,606.83	\$ -	\$	294,606.83
	500	\$ 14,138.66	\$ -	\$	14,138.66
	600	\$ 54,352.33	\$ -	\$	54,352.33
	700	\$ 2,500.00	\$ -	\$	2,500.00
FUNCTOTAL		\$ 1,162,032.06	\$ 9,744.00	\$	1,171,776.06
5300	100	\$ -	\$ -	\$	-
	200	\$ -	\$ -	\$	-
	300	\$ 20,128.72	\$ -	\$	20,128.72
	500	\$ 19,364.38	\$ -	\$	19,364.38
	600	\$ 23,902.34	\$ -	\$	23,902.34
	700	\$ 11,291.79	\$ -	\$	11,291.79
FUNCTOTAL		\$ 74,687.23	\$ -	\$	74,687.23
5400	100	\$ -	\$ -	\$	-
	200	\$ -	\$ -	\$	-
	300	\$ -	\$ -	\$	-
	500	\$ -	\$ -	\$	-
	600	\$ -	\$ -	\$	-
	700	\$ -	\$ -	\$	-
FUNCTOTAL		\$ -	\$ -	\$	-
5500	100	\$ 1,233,163.68	\$ (7,000.00)	\$	1,226,163.68
	200	\$ 323,295.79	\$ 2,461.00	\$	325,756.79
	300	\$ 53,680.53	\$ (3,000.00)	\$	50,680.53
	500	\$ 128,846.24	\$ 3,000.00	\$	131,846.24
	600	\$ 5,208.02	\$ -	\$	5,208.02
	700	\$ -	\$ -	\$	-
FUNCTOTAL		\$ 1,744,194.26	\$ (4,539.00)	\$	1,739,655.26

**Gadsden County School Board
420 (Federal) Fund Appropriations
Thirteen**

5900	100	\$	177,769.78	\$	-	\$	177,769.78
	200	\$	38,648.18	\$	-	\$	38,648.18
	300	\$	51,025.60	\$	-	\$	51,025.60
	400	\$	-	\$	-	\$	-
	500	\$	22,726.76	\$	-	\$	22,726.76
	600	\$	2,000.00	\$	-	\$	2,000.00
FUNCTOTAL		\$	292,170.32	\$	-	\$	292,170.32
6100	100	\$	714,832.03	\$	(14,803.00)	\$	700,029.03
	200	\$	170,804.30	\$	(4,947.40)	\$	165,856.90
	300	\$	152,630.78	\$	(4,177.63)	\$	148,453.15
	500	\$	92,585.83	\$	2,177.63	\$	94,763.46
	600	\$	13,774.69	\$	-	\$	13,774.69
	700	\$	3,745.15	\$	(1,000.00)	\$	2,745.15
	900	\$	-	\$	-	\$	-
FUNCTOTAL		\$	1,148,372.78	\$	(22,750.40)	\$	1,125,622.38
6200	100	\$	2,000.00	\$	(1,000.00)	\$	1,000.00
	200	\$	-	\$	-	\$	-
	300	\$	39,425.00	\$	(5,500.00)	\$	33,925.00
	500	\$	-	\$	-	\$	-
	600	\$	15,125.00	\$	-	\$	15,125.00
	700	\$	-	\$	-	\$	-
FUNCTOTAL		\$	56,550.00	\$	(6,500.00)	\$	50,050.00
6300	100	\$	975,220.02	\$	(64,291.63)	\$	910,928.39
	200	\$	245,269.12	\$	(9,374.00)	\$	235,895.12
	300	\$	342,991.39	\$	28,000.00	\$	370,991.39
	400	\$	-	\$	-	\$	-
	500	\$	100,807.96	\$	(13,895.33)	\$	86,912.63
	600	\$	27,000.01	\$	(2,000.01)	\$	25,000.00
	700	\$	22,672.39	\$	4,000.00	\$	26,672.39
FUNCTOTAL		\$	1,713,960.89	\$	(57,560.97)	\$	1,656,399.92
6400	100	\$	1,219,473.19	\$	141,606.62	\$	1,361,079.81
	200	\$	321,995.37	\$	17,541.35	\$	339,536.72
	300	\$	354,947.58	\$	4,470.02	\$	359,417.60
	400	\$	-	\$	-	\$	-
	500	\$	57,566.10	\$	8,825.68	\$	66,391.78
	600	\$	-	\$	-	\$	-
	700	\$	11,754.28	\$	5,152.00	\$	16,906.28
FUNCTOTAL		\$	1,965,736.52	\$	177,595.67	\$	2,143,332.19

**Gadsden County School Board
420 (Federal) Fund Appropriations
Thirteen**

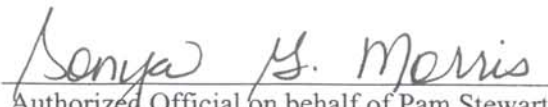
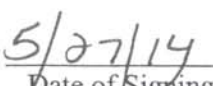

6500	100	\$	27,500.00	\$	(27,500.00)	\$	-
	200	\$	6,953.85	\$	(6,664.00)	\$	289.85
	300	\$	157,420.07	\$	(10,334.00)	\$	147,086.07
	500	\$	405.00	\$	-	\$	405.00
	600	\$	155,641.74	\$	(500.00)	\$	155,141.74
FUNCTOTAL		\$	347,920.66	\$	(44,998.00)	\$	302,922.66
7200	100	\$	33,170.11	\$	-	\$	33,170.11
	200	\$	24,750.17	\$	-	\$	24,750.17
	300	\$	1,239.62	\$	-	\$	1,239.62
	500	\$	-	\$	-	\$	-
	600	\$	-	\$	-	\$	-
	700	\$	317,874.03	\$	4,765.39	\$	322,639.42
FUNCTOTAL		\$	377,033.93	\$	4,765.39	\$	381,799.32
7300	100	\$	68,000.00	\$	18,728.32	\$	86,728.32
	200	\$	10,063.00	\$	2,437.00	\$	12,500.00
	600	\$	(1.00)	\$	-	\$	(1.00)
FUNCTOTAL		\$	78,062.00	\$	21,165.32	\$	99,227.32
7400	300	\$	53,915.00	\$	-	\$	53,915.00
	600	\$	475,680.68	\$	(2,000.00)	\$	473,680.68
FUNCTOTAL		\$	529,595.68	\$	(2,000.00)	\$	527,595.68
7600	100	\$	1,586.00	\$	-	\$	1,586.00
	200	\$	191.80	\$		\$	191.80
FUNCTOTAL		\$	1,777.80	\$	-	\$	1,777.80
7700	100	\$	117,584.66	\$	(1,563.78)	\$	116,020.88
	200	\$	41,953.07	\$	(329.86)	\$	41,623.21
	300	\$	20,200.00	\$	(2,268.65)	\$	17,931.35
	500	\$	879.00	\$	-	\$	879.00
	600	\$	-	\$	-	\$	-
	700	\$	5,500.00	\$	(1,425.00)	\$	4,075.00
FUNCTOTAL		\$	186,116.73	\$	(5,587.29)	\$	180,529.44
7800	100	\$	129,812.19	\$	(17,253.99)	\$	112,558.20
	200	\$	34,570.06	\$	601.53	\$	35,171.59
	300	\$	108,112.84	\$	(11,850.00)	\$	96,262.84
	400	\$	410.01	\$	400.00	\$	810.01
	500	\$	1,032.00	\$	(400.00)	\$	632.00
	600	\$	-	\$	-	\$	-
FUNCTOTAL		\$	273,937.10	\$	(28,502.46)	\$	245,434.64

**Gadsden County School Board
420 (Federal) Fund Appropriations
Thirteen**

7900	100	\$	8,047.17	\$	-	\$	8,047.17
	200	\$	1,250.03	\$	-	\$	1,250.03
	300	\$	112,455.13	\$	(2,000.00)	\$	110,455.13
	400	\$	14,640.31	\$	-	\$	14,640.31
	500	\$	13,570.42	\$	2,000.00	\$	15,570.42
	600	\$	6,076.56	\$	-	\$	6,076.56
	700	\$	-	\$	-	\$	-
FUNCTOTAL		\$	156,039.62	\$	-	\$	156,039.62
8100	100	\$	262.59	\$	-	\$	262.59
	200	\$	38.57	\$	-	\$	38.57
	300	\$	4,072.00	\$	-	\$	4,072.00
	500	\$	2,000.00	\$	-	\$	2,000.00
	600	\$	1,092.02	\$	-	\$	1,092.02
FUNCTOTAL		\$	7,465.18	\$	-	\$	7,465.18
8200	100	\$	-	\$	-	\$	-
	200	\$	-	\$	-	\$	-
	500	\$	-	\$	-	\$	-
	600	\$	-	\$	-	\$	-
FUNCTOTAL		\$	-	\$	-	\$	-
9100	100	\$	35,207.61	\$	-	\$	35,207.61
	200	\$	11,482.29	\$	-	\$	11,482.29
	300	\$	-	\$	-	\$	-
	400	\$	-	\$	-	\$	-
	500	\$	-	\$	-	\$	-
FUNCTOTAL		\$	46,689.90	\$	-	\$	46,689.90
GRANDTOTAL		\$	11,970,819.87	\$	825.68	\$	11,971,645.55

**Florida Department of Education
Project Award Notification**

Proj. 4221240-4221248

1 PROJECT RECIPIENT Gadsden County School District	2 PROJECT NUMBER 200-2124A-4CB01
3 PROJECT/PROGRAM TITLE Title I Part A Education of Disadvantaged Children & Youth <p align="center">TAPS 14A001</p>	4 AUTHORITY 84.010A Title I, Part A, Basic
5 AMENDMENT INFORMATION Amendment Number: 1 Type of Amendment: Roll Forward Increase Effective Date: 05/07/2014	6 PROJECT PERIODS Budget Period: 07/01/2013 - 06/30/2014 Program Period: 07/01/2013 - 06/30/2014
7 AUTHORIZED FUNDING Current Approved Budget: \$ 2,861,647.00 Amendment Amount: Estimated Roll Forward: Certified Roll Amount: \$ 500,825.68 Total Project Amount: \$ 3,362,472.68	8 REIMBURSEMENT OPTION Federal Cash Advance
9 TIMELINES <ul style="list-style-type: none"> • Last date for incurring expenditures and issuing purchase orders: <u>06/30/2014</u> • Date that all obligations are to be liquidated and final disbursement reports submitted: <u>08/20/2014</u> • Last date for receipt of proposed budget and program amendments: <u>05/31/2014</u> • Refund date of unexpended funds; mail to DOE Comptroller, 325 W. Gaines Street, 944 Turlington Building, Tallahassee, Florida 32399-0400: • Date(s) for program reports: 	
10 DOE CONTACTS Program: Sonya Morris Phone: (850) 245 - 9614 Email: Sonya.Morris@fldoe.org Grants Management: Unit A (850) 245-0496	11 DOE FISCAL DATA DBS: 40 90 20 EO: 97 Object: 720035
12 TERMS AND SPECIAL CONDITIONS <ul style="list-style-type: none"> • This project and any amendments are subject to the procedures outlined in the <u>Project Application and Amendment Procedures for Federal and State Programs</u> (Green Book) and the General Assurances for Participation in Federal and State Programs. • For federal cash advance projects, monthly expenditures must be submitted to the Comptroller's Office by the 20th of each month for the preceding month's disbursements utilizing the On-Line Disbursement Reporting System. • The Certified Roll Amount in Block 7 is the sum of the Certified Roll amount of \$500,821.68 and \$4.00 increase to the Title I Part A allocation. 	
13 APPROVED: <div style="display: flex; justify-content: space-between; align-items: flex-end;"> <div style="width: 45%;">  _____ Authorized Official on behalf of Pam Stewart Commissioner of Education </div> <div style="width: 25%; text-align: center;">  _____ Date of Signing </div> <div style="width: 25%; text-align: right;">  </div> </div>	

FLORIDA DEPARTMENT OF EDUCATION PROJECT AMENDMENT REQUEST

Please return to: Florida Department of Education Office of Grants Management Room 332 Turlington Building 325 West Gaines Street Tallahassee, Florida 32399-0400 (850) 245-0496	DOE USE ONLY Date Received: REVISED
B) Amendment Number <p style="text-align: center;"><u>1</u></p>	A) Agency Name <p style="text-align: center;">GADSDEN COUNTY SCHOOL DISTRICT</p>
D) Program Name <u>School District of Gadsden County</u> Project Number <u>200-2124A-4CB01</u> TAPS Number <u>14A001</u>	C) Amendment Type <input checked="" type="checkbox"/> <i>Program</i> <input checked="" type="checkbox"/> <i>Budget</i>

E) Amendment Request Contact Information

Name: Rose Raynak	Address: 35 Martin Luther King Jr. Blvd.
Telephone: 850-627-9651 x 1600	
Fax: 850-875-2983	E-mail: raynakr@gcpsmail.com

F) Required Signature

Superintendent/Agency Head <u>SEE PREVIOUS PAGE</u>	
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G) Narrative

Gadsden County would like to request an amendment to include the 2012-2013 Roll Forward amount of \$825.68. Internal budget adjustments that properly reflect expenditures and that do not require an approved budget amendment, as specifically identified and outline by the Green Book, will also be made by the district finance officer.

The total budget will go from initial award of \$3,361,647.00 to \$3,362,472.68 (additional \$825.68). The roll forward amount of \$825.68 will be used to purchase supplies for the summer professional development of teachers and paraprofessional in common core area support. Also the private school equitable reservation is included.



A) GADSDEN District/Agency Name B) 200-2124A-4CB01 Project Number C) 14A001 TAPS Number

D) 1 Amendment Number

FLORIDA DEPARTMENT OF EDUCATION BUDGET AMENDMENT NARRATIVE FORM

E) Total Project Amount Currently Approved <div style="text-align: right; margin-top: 10px;"><u>\$3,361,647.00</u></div>	F) Total Project Amount from this Budget Amendment <div style="text-align: right; margin-top: 10px;"><u>\$3,362,472.68</u></div>
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G) Line Item Description

Function	Object	Account Title & Narrative	FTE	Amount Increase	Amount Decrease
6400	510	Supplies-Additional supplies for summer professional development for classroom teacher and paras to support common core.		789.76	
6400	510	Supplies-Additional supplies for summer professional development for private school Title I eligible teachers/paras (2/2) to support common core (825.68 x 4.35%=\$35.92)		35.92	
TOTALS				\$825.68	\$0.00

FLORIDA DEPARTMENT OF EDUCATION



STATE BOARD OF EDUCATION

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JOHN R. PADGET, *Vice Chair*

Members

ADA G. ARMAS, M.D.

JOHN A. COLÓN

BARBARA S. FEINGOLD

REBECCA FISHMAN LIPSEY

Pam Stewart
Commissioner of Education

January 17, 2014

TO: Ms. Kimberly S. Ferree
Gadsden County School Board

FROM: Matt Kirkland, Chief Comptroller

SUBJECT: Title I, Part A, Basic, Fiscal Year 2013 Roll Forward Funds

FOR YOUR INFORMATION, below are the 2013 certified roll forward funds for Title I, Part A.

Accumulated 2012 Roll Forward	\$947,270.71
2013 Title I, Part A Allocation (Basic & SES Choice)	\$3,017,891.00
Total 2013 Funds Available	\$3,965,161.71
Less: Final 2013 Expenditures for Title I, Part A (Basic & SES Choice)	\$3,464,340.03
Approved Accumulated 2013 Roll Forward	\$500,821.68
Title I, Part A, Basic 2014 Allocation	2,861,651.00
Total Fiscal Year 2014 Funds Available	\$3,362,472.68

If the total FY 2014 funds available (above) are less than the project amount indicated in the project approval letter, no amendment is necessary; the project amount should be reduced to agree with the FY 2014 funds available. (The project amount cannot exceed the total FY 2014 funds available.) If the total FY 2014 funds available are greater than the project amount and you wish to utilize those additional funds, a budget amendment must be requested to increase the project to the total FY 2014 funds available. Budget amendments are requested using form DOE-150. If the total FY 2014 funds available are equal to the project amount, the authority to encumber and/or expend the total project amount is now effective by receipt of this letter. If there are any questions regarding this roll forward, please contact Brooks Cooksey at (850) 245-9163.

cc: Gwen Jackson, Department of Education
cc: Sonya Morris, Department of Education
cc: Superintendent

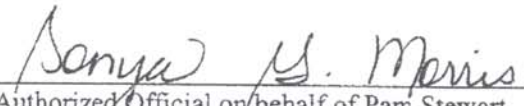

Agency # 200

MATT KIRKLAND
CHIEF COMPTROLLER, BUREAU OF THE COMPTROLLER

325 W. GAINES STREET • SUITE 914 • TALLAHASSEE, FLORIDA 32399-0400 • 850-245-0401 • FAX 850-245-9220
www.fldoe.org

**Florida Department of Education
Project Award Notification**

Proj. 4212631

1 PROJECT RECIPIENT Gadsden County School District	2 PROJECT NUMBER 200-1263A-4C001
3 PROJECT/PROGRAM TITLE Title I School Improvement Fund 1003(g) <p align="center">TAPS 14A145</p>	4 AUTHORITY 84.377A Title I Part A School Improvement Fund
5 AMENDMENT INFORMATION Amendment Number: 1 Type of Amendment: Budget/Extension Effective Date: 04/24/2014	6 PROJECT PERIODS Budget Period: 07/01/2013 - 09/30/2014 Program Period: 07/01/2013 - 09/30/2014
7 AUTHORIZED FUNDING Current Approved Budget: \$ 1,727,576.00 Amendment Amount: Estimated Roll Forward: Certified Roll Amount: Total Project Amount: \$ 1,727,576.00	8 REIMBURSEMENT OPTION Federal Cash Advance
9 TIMELINES <ul style="list-style-type: none"> • Last date for incurring expenditures and issuing purchase orders: <u>09/30/2014</u> • Date that all obligations are to be liquidated and final disbursement reports submitted: <u>11/20/2014</u> • Last date for receipt of proposed budget and program amendments: <u>08/31/2014</u> • Refund date of unexpended funds; mail to DOE Comptroller, 325 W. Gaines Street, 944 Turlington Building, Tallahassee, Florida 32399-0400: • Date(s) for program reports: 	
10 DOE CONTACTS Program: Sonya Morris Phone: (850) 245 - 9614 Email: Sonya.Morris@fldoe.org Grants Management: Unit A (850) 245-0496	11 DOE FISCAL DATA DBS: 40 90 20 EO: 75 Object: 720035
12 TERMS AND SPECIAL CONDITIONS <ul style="list-style-type: none"> • This project and any amendments are subject to the procedures outlined in the <u>Project Application and Amendment Procedures for Federal and State Programs</u> (Green Book) and the General Assurances for Participation in Federal and State Programs. • For federal cash advance projects, monthly expenditures must be submitted to the Comptroller's Office by the 20th of each month for the preceding month's disbursements utilizing the On-Line Disbursement Reporting System. 	
13 APPROVED: <div style="display: flex; justify-content: space-between; align-items: flex-end;"> <div style="width: 45%;">  <hr/> Authorized Official on behalf of Pam Stewart Commissioner of Education </div> <div style="width: 20%; text-align: center;">  5/27/14 <hr/> Date of Signing </div> </div>	

DOE-200
Revised 02/05

FLORIDA DEPARTMENT OF EDUCATION
BUDGET NARRATIVE FORM

A) Name of Eligible Recipient/Fiscal Agent: Gadsden County
School District - CES
& GWM combo budget

B) DOE Assigned Project Number: 200-1263A-4C001

C) TAPS Number: 14A145

-1	-2	-3	-4	-6	-7
FUNCTION	OBJECT	ACCOUNT TITLE AND NARRATIVE	FTE POSITION	Decrease	Increase
5100	140	GWM - substitute pay for classroom teachers for training during regular school day	0	5,000.00	
5100	150	CES - paraprofessional salary - instructional para for interventions	1	18,000.00	
5100	156	CES - paraprofessional - extended day salary @ 30 min. per school day - not including holidays, leave, or early release days	0	2,000.00	
5100	156	GWM - paraprofessional - extended day salary @ 30 min. per school day - not including holidays, leave, or early release days	0	2,000.00	
5100	230	CES - group health classroom paras - flat rate of \$4,500 each	0	4,500.00	
5100	232	CES - life insurance classroom paras - flat rate of \$220 each	0	220.00	
5100	310	CES - professional and technical services for instructional consultants, including consultants for lesson study, RtI, PBS, and parent/community trainings	0	1,000.00	
5100	310	GWM - professional and technical services for instructional consultants, including consultants for lesson study, RtI, PBS, and parent/community trainings	0	1,500.00	
5100	360	CES - instructional software rentals	0	500.00	
5100	360	GWM - instructional software rentals	0	1,500.00	

-1	-2	-3	-4	-6	-7
FUNCTION	OBJECT	ACCOUNT TITLE AND NARRATIVE	FTE POSITION	Decrease	Increase
5100	390	CES - other purchased instructional services onsite classroom training to assist with classroom management and PBS	0	250.00	
5100	390	GWM - other purchased instructional services onsite classroom training to assist with classroom management and PBS	0	1,500.00	
5100	510	CES - classroom supplies such as: paper, ink, pencils, workbooks, markers, paper clips, staplers, highlighters, binders, sticky notes	0	5,048.88	
5100	510	GWM - classroom supplies such as: paper, ink, pencils, workbooks, markers, paper clips, staplers, highlighters, binders, sticky notes	0	4,000.00	
5100	642	CES - non-capitalized (under \$750) furniture/fixtures/equipment, as necessary to keep student work stations and classrooms running as planned in the project, including projectors, monitors, classroom streaming equipment	0	500.00	
5100	642	GWM - non-capitalized (under \$750) furniture/fixtures/equipment, as necessary to keep student work stations and classrooms running as planned in the project, including projectors, monitors, classroom streaming equipment	0	1,500.00	
5100	644	CES - non-capitalized (under \$750) computer hardware, as necessary, to replace, update technology necessary for the implementation of the project, including printers, fax, computer workstations, laptops	0	500.00	
5100	644	GWM - non-capitalized (under \$750) computer hardware, as necessary, to replace, update technology necessary for the implementation of the project, including printers, fax, computer workstations, laptops	0	1,500.00	
5500	126	CES - extended day for preK teachers @ 30 min. per school day - not including holidays, leave, or early release days	0	4,500.00	

-1	-2	-3	-4	-6	-7
FUNCTION	OBJECT	ACCOUNT TITLE AND NARRATIVE	FTE POSITION	Decrease	Increase
5500	156	CES - extended day for preK paras @ 30 min. per school day - not including holidays, leave, or early release days	0	1,500.00	
5500	156	GWM - extended day for preK paras @ 30 min. per school day - not including holidays, leave, or early release days	0	1,000.00	
6100	130	GWM - behavior specialist salary	1.5	4,500.00	
6100	136	GWM- behavior specialist extended day pay	0	3,000.00	
6100	160	CES - ETO - Rtl specialist - reeode	0.5	27,500.00	
6100	160	GWM - ETO - Rtl specialist reeode	0.5	27,500.00	
6100	161	CES - ETO - Rtl specialist miscellaneous pay for workshops outside regular work day	0	1,000.00	
6100	161	GWM - ETO - Rtl specialist miscellaneous pay for workshops outside regular work day	0	2,000.00	
6100	162	GWM - ETO - Rtl specialist in-service pay for professional development	0	1,000.00	
6100	210	CES - ETO - Rtl specialist retirement	0	1,925.00	
6100	210	GWM - ETO - Rtl specialist retirement	0	1,925.00	
6100	220	CES - ETO - Rtl specialist social security	0	2,103.75	
6100	220	GWM - ETO - Rtl specialist social security	0	2,103.75	
6100	230	CES - ETO - Rtl specialist group health	0	2,250.00	
6100	230	GWM - ETO - Rtl specialist group health	0	2,250.00	
6100	232	CES - .5 behavior specialist life insurance	0	60.00	
6100	232	CES - ETO - Rtl specialist life insurance	0	110.00	
6100	232	GWM - ETO - Rtl specialist life insurance	0	110.00	
6100	240	CES - .5 behavior specialist workers compensation	0	125.00	
6100	240	CES - ETO - Rtl specialist workers compensation	0	250.00	
6100	240	GWM - ETO - Rtl specialist workers compensation	0	250.00	
6100	330	CES - ETO - Rtl specialist travel in county between schools, outside county and outside state for state and national conferences, includes mileage, per diem, hotel, and flights as necessary	0	1,000.00	

-1	-2	-3	-4	-6	-7
FUNCTION	OBJECT	ACCOUNT TITLE AND NARRATIVE	FTE POSITION	Decrease	Increase
6100	330	GWM- ETO- Rtl specialist travel in county between schools, outside county and outside state for state and national conferences, includes mileage, per diem, hotel, and flights as necessary	0	1,000.00	
6100	730	CES- ETO- Rtl specialist dues and fees for national Rtl organizations and registration for conferences and workshops	0	500.00	
6100	730	GWM- ETO- Rtl specialist dues and fees for national Rtl organizations and registration for conferences and workshops	0	500.00	
6200	162	GWM - media specialist in-service training	0	1,000.00	
6200	310	CES - instructional media professional services for installation of audio visual equipment	0	500.00	
6200	310	GWM - instructional media professional services for installation of audio visual equipment	0	1,000.00	
6200	390	CES - instructional media other purchased services, as needed, for set up and breakdown of equipment at parent meetings	0	1,500.00	
6200	390	GWM- instructional media other purchased services, as needed, for set up and breakdown of equipment at parent and community meetings	0	2,500.00	
6300	110	CES- ETO- administration salary	0.5	36,000.00	
6300	110	GWM- ETO- administration salary	0.5	36,000.00	
6300	160	CES - ETO - administrative support salary	0.2	8,000.00	
6300	160	GWM - ETO - administrative support salary	0.2	8,000.00	
6300	210	CES - ETO - administrative and .5 technology specialist and administration retirement	0	595.00	
6300	210	GWM - ETO - administrative and administration retirement	0	2,520.00	
6300	220	CES - ETO -administrative and .5 technology specialist and administration social security	0	649.50	
6300	220	GWM - ETO -administrative and administration social security	0	2,753.50	
6300	230	GWM - ETO - administrative and administration group health	0	2,250.00	

-1	-2	-3	-4	-6	-7
FUNCTION	OBJECT	ACCOUNT TITLE AND NARRATIVE	FTE POSITION	Decrease	Increase
6300	232	CES - ETO - administrative and .5 technology specialist and administration life insurance	0	70.00	
6300	232	GWM - ETO - administrative and administration life insurance	0	170.00	
6300	240	GWM - ETO - administrative and administration workers compensation	0	325.00	
6300	390	GWM - ETO - other purchased services, including assistance with dissemination of materials for community and parent meetings, additional translators for multiple meetings at the same day, printing and mailing	0	1,500.00	
6300	510	CES - ETO - administrative supplies including paper, ink, pencils, workbooks, markers, paper clips, staplers, highlighters, binders, sticky notes	0	12,543.00	
6300	510	GWM - ETO - administrative supplies including paper, ink, pencils, workbooks, markers, paper clips, staplers, highlighters, binders, sticky notes	0	7,568.50	
6300	642	GWM - ETO - non-capitalized ((under \$750) furniture/fixture/equipment to provide services to ETO schools including portable projectors, maps, science materials for the greenhouse for the STEM program	0	1,000.00	
6300	644	GWM - ETO - non-capitalized (under \$750) computer equipment - to include demonstration iPads, Lenovos, laptops	0	1,000.00	
		CES - coach/specialist in-service pay for professional development (job-embedded and other) Note: Any school staff attending professional development training paid for with federal funds will be paid a flat rate for attendance as follows for attendance at district led events: • Half-day (defined as at least 3 hours and no more than 4 hours) will be paid at a flat rate of \$50.00 • Full-day (defined as at least 6 hours and no more than 7 hours) will be paid at a flat rate of \$100.00			

-1	-2	-3	-4	-6	-7
FUNCTION	OBJECT	ACCOUNT TITLE AND NARRATIVE	FTE POSITION	Decrease	Increase
6400	132	<ul style="list-style-type: none"> • One-hour trainings will be paid at a flat rate of \$20, not to exceed the maximum for half-day or full-day as defined above. • If training is held out of the district and a supplement/stipend is being paid for attendance by another agency, there will be no additional compensation paid out to the employee in addition to the other agency's supplement/stipend. • If training is held out of the district and the district absorbs the costs of travel, including but not limited to hotel, mileage, gasoline, registration, no additional per hour or per day stipend will be paid to the employee attending the training. <p>These policies and rates apply to all professional development provided and paid for with federal funds.</p>	0	5,000.00	
6400	132	<p>GWM- coach/specialist in-service pay for professional development (job-embedded and other) Note:</p> <p>Any school staff attending professional development training paid for with federal funds will be paid a flat rate for attendance as follows for attendance at district led events:</p> <ul style="list-style-type: none"> • Half-day (defined as at least 3 hours and no more than 4 hours) will be paid at a flat rate of \$50.00 • Full-day (defined as at least 6 hours and no more than 7 hours) will be paid at a flat rate of \$100.00 • One-hour trainings will be paid at a flat rate of \$20, not to exceed the maximum for half-day or full-day as defined above. • If training is held out of the district and a supplement/stipend is being paid for attendance by another agency, there will be no additional compensation paid out to the employee in addition to the other agency's supplement/stipend. 	0		

-1	-2	-3	-4	-6	-7
FUNCTION	OBJECT	ACCOUNT TITLE AND NARRATIVE	FTE POSITION	Decrease	Increase
		<p>* If training is held out of the district and the district absorbs the costs of travel, including but not limited to hotel, mileage, gasoline, registration, no additional per hour or per day stipend will be paid to the employee attending the training.</p> <p>These policies and rates apply to all professional development provided and paid for with federal funds.</p>		5,000.00	
6400	162	<p>CES — other support specialists in-service pay for trainings and PD (job embedded and other) Note: Any school staff attending professional development training paid for with federal funds will be paid a flat rate for attendance as follows for attendance at district led events:</p> <ul style="list-style-type: none"> * Half-day (defined as at least 3 hours and no more than 4 hours) will be paid at a flat rate of \$50.00 * Full-day (defined as at least 6 hours and no more than 7 hours) will be paid at a flat rate of \$100.00 * One hour trainings will be paid at a flat rate of \$20, not to exceed the maximum for half-day or full-day as defined above. <p>* If training is held out of the district and a supplement/stipend is being paid for attendance by another agency, there will be no additional compensation paid out to the employee in addition to the other agency's supplement/stipend.</p> <p>* If training is held out of the district and the district absorbs the costs of travel, including but not limited to hotel, mileage, gasoline, registration, no additional per hour or per day stipend will be paid to the employee attending the training.</p> <p>These policies and rates apply to all professional development provided and paid for with federal funds.</p>	0	4,000.00	
		GWM — other support specialists in-service pay for trainings and PD (job embedded and other) Note:			

-1	-2	-3	-4	-6	-7
FUNCTION	OBJECT	ACCOUNT TITLE AND NARRATIVE	FTE POSITION	Decrease	Increase
6400	162	<p>Any school staff attending professional development training paid for with federal funds will be paid a flat rate for attendance as follows for attendance at district led events:</p> <ul style="list-style-type: none"> * Half-day (defined as at least 3 hours and no more than 4 hours) will be paid at a flat rate of \$50.00 * Full day (defined as at least 6 hours and no more than 7 hours) will be paid at a flat rate of \$100.00 * One hour trainings will be paid at a flat rate of \$20, not to exceed the maximum for half day or full day as defined above. * If training is held out of the district and a supplement/stipend is being paid for attendance by another agency, there will be no additional compensation paid out to the employee in addition to the other agency's supplement/stipend. * If training is held out of the district and the district absorbs the costs of travel, including but not limited to hotel, mileage, gasoline, registration, no additional per hour or per day stipend will be paid to the employee attending the training. <p>These policies and rates apply to all professional development provided and paid for with federal funds.</p>	0	4,000.00	
6400	210	CES - in-service and regular pay retirement for coaches and specialists, teachers and paras	0	5,500.00	
6400	230	CES - regular pay group health for coaches and specialists	0	8,500.00	
6400	230	GWM - regular pay group health for coaches and specialists	0	12,000.00	
6400	232	CES - regular pay life insurance for coaches and specialists	0	600.00	
6400	232	GWM- regular pay life insurance for coaches and specialists	0	1,200.00	

-1	-2	-3	-4	-6	-7
FUNCTION	OBJECT	ACCOUNT TITLE AND NARRATIVE	FTE POSITION	Decrease	Increase
6400	360	GWM - ETO - software rentals necessary to provide adequate coaching and training to school-level staff, including reading, science, and math teacher materials for adopted texts and/or interventions, and/or other software programs necessary to provide support to the professional development activities as determined by teacher needs.	0	1,500.00	
6400	370	GWM - ETO - communications, copying, printing as necessary for professional development trainings	0	2,480.00	
6400	390	CES - other purchased services necessary for the implementation of the school improvement goals and training, including services related to STEM, printing and mailing	0	500.00	
6400	390	CES - ETO - other purchased services to do set up and breakdown for training sessions, other required personnel by school for trainings such as lockup and/or administrative oversight during trainings	0	2,056.00	
6400	390	GWM - other purchased services necessary for the implementation of the school improvement goals training, including services related to STEM and printing/mailing	0	1,000.00	
6400	390	GWM - ETO - other purchased services to do set up and breakdown for training sessions, other required personnel by school for trainings such as lockup and/or administrative oversight during trainings	0	2,000.00	
6500	160	CES - technology specialist @ 50% to provide services and training for infusing technology into classroom and ensuring technology is working properly for instruction	0.5	27,500.00	
6500	210	CES - retirement for technology specialist @ 50%	0	1,925.00	
6500	220	CES - social security for technology specialist @ 50%	0	2,104.00	
6500	230	CES - group health for technology specialist @ 50%	0	2,250.00	

-1	-2	-3	-4	-6	-7
FUNCTION	OBJECT	ACCOUNT TITLE AND NARRATIVE	FTE POSITION	Decrease	Increase
6500	232	CES - life insurance for technology specialist @ 50%	0	110.00	
6500	240	CES - workers compensation for technology specialist @ 50%	0	275.00	
6500	350	CES - for infrastructure repairs/maintenance of wireless and connecting wiring as necessary	0	3,500.00	
6500	350	GWM - for infrastructure repairs/maintenance of wireless and connecting wiring as necessary	0	1,500.00	
6500	390	CES - other purchased services to include imaging and installation of laptops for tested grade students in individual classrooms	0	1,334.00	
6500	390	GWM- other purchased services to include imaging and installation of laptops for tested grade students in individual classrooms	0	4,000.00	
6500	642	CES - non-capitalized furniture/fixtures/equipment, as necessary to keep student work stations and classrooms running as planned in the project, including projectors, monitors, classroom streaming equipment	0	500.00	
7400	630	GWM - any unanticipated upgrades to buildings and equipment for greenhouse for STEM program	0	1,000.00	
7400	681	GWM - any unanticipated remodeling and renovations necessary for greenhouse for STEM program	0	1,000.00	
7700	330	CES - ETO - travel in-county between schools, to state and regional conferences, and to national conference, includes mileage, hotel, per diem, and flights as necessary for data specialist	0	500.00	
7700	330	GWM - ETO - travel in-county between schools, to state and regional conferences, and to national conference, includes mileage, hotel, per diem, and flights as necessary for data specialist	0	500.00	
7700	730	CES - ETO - dues and fees necessary to support conference registrations for state and/or national conferences for data specialist	0	1,000.00	
7700	730	GWM - ETO - dues and fees necessary to support conference registrations for state and/or national conferences for data specialist	0	425.00	

-1 FUNCTION	-2 OBJECT	-3 ACCOUNT TITLE AND NARRATIVE	-4 FTE POSITION	-6 Decrease	-7 Increase
7800	240	CES - bus driver costs allocable to program for workers compensation	0	180.00	
7800	390	CES - other transportation costs for mileage and usage of buses	0	4,500.00	
7800	390	GWM - other transportation costs for mileage and usage of buses	0	8,000.00	
5100	126	CES - classroom teacher - extended day salary @ 30 min. per school day - not including holidays, leave, or early release days	0		5,000.00
5100	126	GWM - classroom teacher - extended day salary @ 30 min. per school day - not including holidays, leave, or early release days	0		10,000.00
5100	210	CES - retirement classroom teachers and paras @ 7%	0		1,820.00
5100	210	GWM - retirement classroom teachers and paras	0		7,670.00
5100	220	CES - social security classroom teachers and paras @ 7.65%	0		1,946.00
5100	220	GWM - social security classroom teachers and paras	0		7,950.00
5100	240	CES - workers compensation classroom teachers and paras - at 1.33%	0		329.00
5100	240	GWM - workers compensation classroom teachers and paras	0		1,475.00
5200	126	CES - extended day pay for ESE teachers @ 30 min. per school day - not including holidays, leave, or early release days	0		2,000.00
5200	126	GWM - extended day pay for ESE teachers @ 30 min. per school day - not including holidays, leave, or early release days	0		2,000.00
5200	156	CES - ESE para extended day @ 30 min. per school day - not including holidays, leave, or early release days	0		1,500.00
5200	156	GWM - ESE para extended day @ 30 min. per school day - not including holidays, leave, or early release days	0		1,500.00
5200	210	CES - ESE retirement teachers and paras	0		580.00

-1	-2	-3	-4	-6	-7
FUNCTION	OBJECT	ACCOUNT TITLE AND NARRATIVE	FTE POSITION	Decrease	Increase
5200	210	GWM- ESE retirement - teachers and paras	0		510.00
5200	220	CES - ESE social security teachers and paras	0		541.00
5200	220	GWM - ESE social security - teachers and paras	0		464.00
5200	240	CES - ESE workers compensation teachers and paras	0		492.00
5200	240	GWM - ESE workers compensation - teachers and paras	0		157.00
5500	210	CES - retirement preK teachers and paras	0		510.00
5500	210	GWM - retirement preK teachers and paras	0		160.00
5500	220	CES - social security preK teachers and paras	0		464.00
5500	220	GWM - social security preK teachers and paras	0		580.00
5500	240	CES - workers compensation preK teachers and paras	0		407.00
5500	240	GWM - workers compensation preK teachers and paras			340.00
6100	130	CES - behavior specialist @ 50%	0.5		1,250.00
6100	133	CES - behavior specialist salary - MA supplement	0		2,000.00
6100	133	GWM - behavior specialist salary - MA supplement	0		3,000.00
6100	210	CES- .5 behavior specialist retirement	0		862.00
6100	210	GWM - 1.5 behavior specialists retirement	0		1,723.00
6100	220	CES - .5 behavior specialist social security	0		96.00
6100	220	GWM - 1.5 behavior specialists social security	0		1,586.00
6100	230	GWM- 1.5 behavior specialists group health	0		2,225.00
6100	232	GWM - 1.5 behavior specialists life insurance	0		80.00
6100	240	GWM - 1.5 behavior specialists workers compensation	0		186.00
6300	160	CES - .5 technology specialist	0.5		27,500.00
6300	240	CES - ETO - administrative and .5 technology specialist and administration workers compensation	0		41.00
6300	330	CES - ETO - administration (Deputy) travel to state, regional meetings, between schools, and to national conferences, includes mileage, per diem, hotel, and flights as necessary	0		2,000.00

-1	-2	-3	-4	-6	-7
FUNCTION	OBJECT	ACCOUNT TITLE AND NARRATIVE	FTE POSITION	Decrease	Increase
6300	360	CES - ETO- software rentals of programs for student interventions and to translate parent and student materials, edit pdf documents, data analysis software packages	0		9,000.00
6300	360	GWM - ETO- software rentals of programs for student interventions and to translate parent and student materials, edit pdf documents, data analysis software packages	0		13,000.00
6300	370	CES - ETO - communication services including leased copier/printers, phones, conference calls, and dissemination of notices, as well as dissemination of notices translated for parents	0		3,000.00
6300	370	GWM - ETO - communication services including leased copier/printers, phones, conference calls, and dissemination of notices, as well as dissemination of notices translated for parents	0		2,000.00
6300	390	CES - ETO - other purchased services, including assistance with dissemination of materials for community and parent meetings, additional translators for multiple meetings at the same day, printing and mailing	0		500.00
6300	730	CES - ETO - dues and fees for registration for conferences and state meetings, federal and/or state technical assistance organizations like science fairs, ECTAC and FASFEPa and FedNet for administration (Deputy)	0		2,000.00
6300	730	GWM - ETO - dues and fees for registration for conferences and state meetings, federal and/or state technical assistance organizations like science fairs, ECTAC and FASFEPa and FedNet for administration (Deputy)	0		2,000.00
6400	121	GWM - other compensation academic coach for non-work hour PD	0		2,000.00
		CES - teacher in-service pay for professional development (job-embedded and other) Note:			

-1	-2	-3	-4	-6	-7
FUNCTION	OBJECT	ACCOUNT TITLE AND NARRATIVE	FTE POSITION	Decrease	Increase
6400	122	<p>Any school staff attending professional development training paid for with federal funds will be paid a flat rate for attendance as follows for attendance at district led events:</p> <ul style="list-style-type: none"> • Half-day (defined as at least 3 hours and no more than 4 hours) will be paid at a flat rate of \$50.00 • Full-day (defined as at least 6 hours and no more than 7 hours) will be paid at a flat rate of \$100.00 • One-hour trainings will be paid at a flat rate of \$20, not to exceed the maximum for half-day or full-day as defined above. • If training is held out of the district and a supplement/stipend is being paid for attendance by another agency, there will be no additional compensation paid out to the employee in addition to the other agency's supplement/stipend. • If training is held out of the district and the district absorbs the costs of travel, including but not limited to hotel, mileage, gasoline, registration, no additional per hour or per day stipend will be paid to the employee attending the training. <p>These policies and rates apply to all professional development provided and paid for with federal funds.</p>	0		20,000.00
6400	122	GWM - teacher in-service pay for professional development (job-embedded and other)	0		22,000.00
6400	130	CES - ETO - 1/2 of each: 2 elementary and 1 secondary Reading Specialist; 1 elementary and 1 secondary Math Specialist; 1 science specialist; and 1 RtI Specialist	3.5		47,500.00
6400	130	GWM - ETO- 1/2 of each: 2 elementary and 1 secondary Reading Specialist; 1 elementary and 1 secondary Math Specialist; 1 science specialist; and 1 RtI Specialist	3.5		47,500.00
6400	136	CES - extended day pay for instructional coaches	0		500.00
6400	152	CES - para in-service pay for professional development (job embedded and other)	0		3,000.00

-1	-2	-3	-4	-6	-7
FUNCTION	OBJECT	ACCOUNT TITLE AND NARRATIVE	FTE POSITION	Decrease	Increase
6400	152	GWM- para in-service pay for professional development (job-embedded and other)	0		6,000.00
6400	210	CES - ETO - 7 ETO specialists retirement and costs associated with in-service training for coaches, teachers, and paras	0		2,375.00
6400	210	GWM - in-service and regular pay retirement for coaches and specialists, teachers and paras	0		2,340.00
6400	210	GWM - ETO - 7 ETO specialists retirement and costs associated with in-service training for coaches, teachers, and paras	0		5,375.00
6400	220	CES - ETO - 7 ETO specialists social security and costs associated with in-service training for coaches, teachers, and paras	0		4,481.00
6400	220	GWM - in-service and regular pay social security for coaches and specialists, teachers and paras	0		8,600.00
6400	220	GWM - ETO - 7 ETO specialists social security and costs associated with in-service training for coaches, teachers, and paras	0		4,481.00
6400	230	CES - ETO - 7 ETO specialists group health and costs associated with in-service training for coaches, teachers, paras	0		4,500.00
6400	230	GWM - ETO - 7 ETO specialists group health and costs associated with in-service training for coaches, teachers, paras	0		4,500.00
6400	232	CES - ETO - 7 ETO specialists life insurance and costs associated with in-service training for coaches, teachers, paras	0		450.00
6400	232	GWM - ETO - 7 ETO specialists life insurance and costs associated with in-service training for coaches, teachers, paras	0		450.00
6400	240	CES - in-service and regular pay workers compensation for coaches and specialists, teachers and paras	0		500.00
6400	240	CES - ETO - 7 ETO specialists workers compensation and costs associated with in-service training for coaches, teachers, and paras	0		750.00

-1	-2	-3	-4	-6	-7
FUNCTION	OBJECT	ACCOUNT TITLE AND NARRATIVE	FTE POSITION	Decrease	Increase
6400	240	GWM - in-service and regular pay workers compensation for coaches and specialists, teachers and paras	0		1,353.00
6400	240	GWM - ETO - 7 ETO specialists workers compensation and costs associated with in-service training for coaches, teachers, and paras	0		1,310.00
6400	330	CES - travel for state and regional conferences such as summer DA conference, state Rtl conference, PBS conference, Dropout Prevention Conference for principals, instructional staff and specialists	0		2,000.00
6400	330	CES - ETO - travel in-county between schools, to state and regional conferences, and to national conference, includes mileage, hotel, per diem, and flights as necessary for ETO specialists	0		5,000.00
6400	330	GWM - travel for state and regional conferences such as summer DA conference, state Rtl conference, PBS conference, Dropout Prevention Conference for principal, instructional staff, and specialists	0		2,000.00
6400	330	GWM - ETO - travel in-county between schools, to state and regional conferences, and to national conference, includes mileage, hotel, per diem, and flights as necessary for ETO specialists	0		3,000.00
6400	510	CES - supplies for professional development (job-embedded and other), parent workshops, and trainings, including colored paper, markers, highlighters, worksheets, paper, pens, poster board, notebooks	0		3,000.00
6400	510	GWM - supplies for professional development, parent workshops, and trainings, including colored paper, markers, highlighters, worksheets, paper, pens, poster board, notebooks	0		5,000.00
6400	730	CES - ETO - dues and fees necessary for ETO specialists to attend state and national conferences	0		2,200.00
6400	730	GWM - ETO- dues and fees necessary for ETO specialists to attend state and national conferences	0		2,000.00
7200	791	CES - Indirect Costs @ 3.02%	0		2,000.00

-1 FUNCTION	-2 OBJECT	-3 ACCOUNT TITLE AND NARRATIVE	-4 FTE POSITION	-6 Decrease	-7 Increase
7300	111	CES -performance pay for teachers and administrators for reaching project goals for student achievement - performance pay must follow directions of negotiated MOU with bargaining unit and with district approved project limitations for administrators as described in the application	0		8,000.00
7300	111	CES - recruitment and retention pay must follow directions of negotiated MOU with bargaining unit	0		5,000.00
7300	111	GWM -performance pay for teachers and administrators for reaching project goals for student achievement - performance pay must follow directions of negotiated MOU with bargaining unit and with district approved project limitations for administrators as described in the application	0		9,750.00
7300	160	ETO - move of specific secretaries for ETO operations in mid year accounted for part of replacement secretary's pay to come from 7300 versus 6300 - did not anticipate this move in original application	0.6		16,000.00
7300	210	CES - retirement charges related to performance, recruitment, and retention pay as identified in MOU and district approved limitations for administrators	0		250.00
7300	210	GWM- retirement charges related to performance, recruitment, and retention pay as identified in MOU and district approved limitations for administrators	0		600.00
7300	220	CES - social security charges related to performance, recruitment, and retention pay as identified in MOU and district approved limitations for administrators	0		87.00
7300	220	GWM - social security charges related to performance, recruitment, and retention pay as identified in MOU and district approved limitations for administrators	0		500.00
7300	240	CES - workers compensation charges related to performance, recruitment, and retention pay as identified in MOU and district approved limitations for administrators	0		500.00

-1	-2	-3	-4	-6	-7
FUNCTION	OBJECT	ACCOUNT TITLE AND NARRATIVE	FTE POSITION	Decrease	Increase
7300	240	GWM - workers compensation charges related to performance, recruitment, and retention pay as identified in MOU and district approved limitations for administrators	0		500.00
7700	210	CES - ETO - retirement for data specialist	0		251.35
7700	210	GWM - ETO - retirement for data specialist	0		255.00
7700	390	CES - ETO - activities that support instructional and support services of project, including evaluation, providing administrative information to Board or other community agencies; statistical services beyond data analyst responsibilities; internal duplication/printing necessary to support the program	0		1,500.00
7700	390	GWM - ETO - activities that support instructional and support services of project, including evaluation, providing administrative information to Board or other community agencies; statistical services beyond data analyst responsibilities; internal duplication/printing necessary to support the program	0		2,500.00
7800	161	CES - bus driver allocable costs to program for extended day transportation	0		800.00
7800	210	CES - bus driver allocable costs to program for retirement	0		183.00
7800	210	GWM - bus driver allocable costs to program for retirement	0		429.87
7800	220	CES - bus driver allocable costs to program for social security	0		80.00
7800	240	GWM - bus driver costs allocable to program for workers compensation	0		63.66
				385,858.88	385,858.88
D) TOTAL				385,858.88	385,858.88

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 7b

DATE OF SCHOOL BOARD MEETING: June 24, 2014

TITLE OF AGENDA ITEMS: Budget Amendment Number Fourteen

DIVISION: Finance Department

PURPOSE AND SUMMARY OF ITEMS:

Board approval is requested for this budget amendment that increases budget for 391 fund (Capital Outlay Other) based on revenue.

FUND SOURCE: 391(Capital Outlay Other) Funds

AMOUNT: \$ 71,700.00

PREPARED BY: Kim Ferree

POSITION: Assistant Superintendent for Business Services

Gadsden County School Board
 Appropriations for 3XX
 Capital Funds
 Budget Amend. No. Fourteen

331 FUND HMS CONSTRUCTION CAPITAL CITY BANK		BEGINNING BUDGET 6/11/2014	BUDGET AMENDMENT FOURTEEN	BUDGET BALANCE 6/11/2014
7400	600	\$ 1,725,000.00	\$ -	\$ 1,725,000.00
FUNCTION TOTAL		\$ 1,725,000.00	\$ -	\$ 1,725,000.00
360 FUND CO & DS		BEGINNING BUDGET 6/11/2014	BUDGET AMENDMENT FOURTEEN	BUDGET BALANCE 6/11/2014
7400	600	40000.00	0.00	40000.00
FUNCTION TOTAL		40000.00	0.00	40000.00
379 FUND CAPITAL IMPROVEMENT		BEGINNING BUDGET 6/11/2014	BUDGET AMENDMENT FOURTEEN	BUDGET BALANCE 6/11/2014
7400	600	\$ 2,695,946.22	\$ -	\$ 2,695,946.22
9700	900	\$ 1,775,354.85	\$ -	1,775,354.85
FUNCTION TOTAL		\$ 4,471,301.07	\$ -	\$ 4,471,301.07

Gadsden County School Board
 Appropriations for 3XX
 Capital Funds
 Budget Amend. No. Fourteen

391 FUND
 CAPITAL OUTLAY
 OTHER

9700	900	\$	80,000.00	\$	71,700.00	\$	151,700.00
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FUNCTION TOTAL		\$	80,000.00	\$	71,700.00	\$	151,700.00
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393 FUND
 HMS CONSTRUCTION
 SUNTRUST BANK

7400	600	\$	2,370,000.00	\$	-	\$	2,370,000.00
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FUNCTION TOTAL		\$	2,370,000.00	\$	-	\$	2,370,000.00
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Gadsden County School Board
 Estimated Revenue
 3XX
 Capital Funds
 Budget Amendment
 Number Fourteen

	REVENUE OBJECT	ESTIMATED REVENUE 6/11/2014	BUDGET AMENDMENT NUMBER FOURTEEN	ENDING ESTIMATED REVENUE 6/11/2014
331 FUND				
HMS CONSTRUCTION				
CAPITAL CITY BANK	721	\$ 1,725,000.00	\$ -	\$ 1,725,000.00
	TOTAL	\$ 1,725,000.00	\$ -	\$ 1,725,000.00
360 FUND				
CO & DS	321	\$ 40,000.00	\$ -	\$ 40,000.00
		\$ 40,000.00	\$ -	\$ 40,000.00
379 FUND				
CAPITAL				
IMPROVEMENTS	413	\$ 2,132,600.00	\$ -	2,132,600.00
	421	\$ -	\$ -	0.00
	TOTAL	\$ 2,132,600.00	\$ -	\$ 2,132,600.00

Gadsden County School Board
 Estimated Revenue
 3XX
 Capital Funds
 Budget Amendment
 Number Fourteen

391 FUND
 CAPITAL OULAY
 OTHER

397	\$	80,000.00	\$	71,700.00	\$	151,700.00
TOTAL	\$	80,000.00	\$	71,700.00	\$	151,700.00

393 FUND
 HMS SUNTRUST
 SECTION 1011 LOAN

721	\$	2,370,000.00	\$	-	\$	2,370,000.00
TOTAL	\$	2,370,000.00	\$	-	\$	2,370,000.00

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 7c

DATE OF SCHOOL BOARD MEETING: June 24, 2014

TITLE OF AGENDA ITEMS: School Board Truth in Millage (TRIM) Timetable

DIVISION: Finance Department

PURPOSE AND SUMMARY OF ITEMS:

Board approval is requested for the Truth in Millage (TRIM) timetable with the following key dates:

Action	Date	Description
Board Meeting	July 22, 2014	Superintendent sends the tentative budget to the Board for approval and Board approves tentative budget for advertising
Newspaper Ads	July 24, 2014	School District advertises its intent to adopt a tentative budget and millage rates, including proposed millage for capital outlay projects.
Board Meeting	July 31, 2014	Public hearing on the tentative budget and millage, adopting the tentative millage rates and tentative budget and publicly announcing the percentage the millage rates exceed the rolled-back rate, if applicable.
Board Meeting	September 9, 2014	Hold a public hearing on the final budget and millage rates. Approve the AFR for submission to the FDOE.

Each of the Board meetings would begin at 6:00 p.m.

See attached schedule.

PREPARED BY: Kimberly Ferree

POSITION: Assistant Superintendent for Business Services

SCHOOL DISTRICT TRIM TIMETABLE

School District TRIM Timetable and Important Dates

On June 1, the property appraiser delivers an estimate of the total assessed value of nonexempt property for the current year to the presiding officer of each taxing authority in the county. The taxing authorities use this estimate for budget planning purposes only.

The Department of Revenue (department) centrally assesses railroad and carline property. If it has not completed a county's railroad assessment by June 1, the property appraiser may use the last year's values for millage certification (s. 193.085(4), F.S.).

Below is a general timeline for the TRIM process. The property appraiser may shorten the times frames. The property appraiser must give written notice and coordinate any new dates with all affected taxing authorities. Taxing authorities can use the full period designated by the times below.

**Day 1 is July 1, or the date of certification, whichever is LATER.
TRIM is actual calendar days including weekends and holidays.**

- | | |
|---------------------------|--|
| Day 1
July 1 | The property appraiser certifies the taxable value in the school district's jurisdiction on Form DR-420S to the school district. If required, the property appraiser will also certify Form DR-420DEBT to the school district for completion. |
| Day 24
July 24 | Within 24 days of the certification of taxable value, the superintendent sends the budget to the school board for approval. |
| Day 29
July 29 | Within 29 days of the certification of taxable value, the school district advertises its intent to adopt a tentative budget and millage rates. <ol style="list-style-type: none">a. If the school district has proposed a millage rate greater than the rolled-back rate, the advertisement must be 1/4 page and headed, "NOTICE OF PROPOSED TAX INCREASE" (s. 200.065(3)(c), F.S.).b. Otherwise, the advertisement should be headed, "NOTICE OF BUDGET HEARING." There is no size requirement (s. 200.065(3)(e), F.S.).c. The school district should publish an adjacent notice meeting the budget summary requirements of s. 129.03(3)(b), F.S., in addition to the advertisement for the tentative hearing (ss. 200.065(3)(e) and 1011, F.S.).d. The following statement must appear in the Budget Summary advertisement in bold type immediately after the heading if the proposed operating budget expenditures for |

the upcoming year are greater than those for the current year (200.065(3)(l), F.S.):

THE PROPOSED OPERATING BUDGET EXPENDITURES OF (name of taxing authority) ARE (percent rounded to one decimal place) MORE THAN LAST YEAR'S TOTAL OPERATING EXPENDITURES.

- e. If a school district intends to levy additional taxes under s. 1011.71, F.S. (Capital Outlay Taxes), it must advertise its intent with the heading, "NOTICE OF TAX FOR SCHOOL CAPITAL OUTLAY." This ad must meet all the requirements of the Notice of Proposed Tax Increase ad (size, time published, etc.) and must be adjacent to the other two required ads. The ad must specify the projects and number of school buses the additional taxes will fund (s. 200.065(10)).

If a school district needs to amend the list of capital outlay projects it previously advertised or adopted, it must publish an Amended Notice of Tax for School Capital Outlay ad. This ad must also meet all of the requirements of s. 200.065(3), F.S., (size, time published, etc.). The school district must hold a public hearing to adopt the amended project list two to five days after the day the ad first appears in the newspaper (s. 200.065(10)(b), F.S.).

**Days 31 to 34
July 31 to
August 3**

Two to five days after the ads for the tentative budget hearing appear in the newspaper, the school district holds a public hearing on the tentative budget and millage.

At this hearing, the school district adopts the tentative millage rates and tentative budget and publicly announces the percent, if any, by which the millage rates exceed the rolled-back rate.

**Day 35
August 4**

Within 35 days of certification of value, each taxing authority informs the property appraiser of the following:

- a. Prior year millage rate
- b. Current year proposed millage rate
- c. Current year rolled-back rate (calculated under s. 200.065, F.S.)
- d. The date, time, and meeting place of the final budget hearing for school districts

For hearing dates with a July 1 certification:

- a. Hold your hearing from September 3 to September 18.
- b. Hold the hearing within 65 to 80 days of the certification of value, Monday through Friday after 5:00 p.m. or any time on Saturday. Do not hold hearings on Sunday.

- c. The county commission cannot schedule its hearings on the same day scheduled by a school district.
- d. No taxing authority (except multi-county/water management districts) can hold a hearing on the same day as a school district or county commission.

If a school district does not provide the required information within 35 days, it cannot levy a millage rate greater than the rolled-back rate for the upcoming year. The property appraiser will calculate the rolled-back rate and use it to prepare the Notice of Proposed Property Taxes (s. 200.065(2) (b), F.S.).

Day 55
August 24

The property appraiser must mail the Notice of Proposed Property Taxes (TRIM notice) within 55 days after certification of value (s. 200.069 and 200.065(2)(b), F.S.).

If the department has issued a review notice under s. 193.1142, F.S., the property appraiser may not send the TRIM notice until the department has approved the assessment roll.

Days 65-80
Sept 3 to 18

Within 65 to 80 days of certification of value, the school district will hold a public hearing on the final budget and millage rates. The TRIM notice, which the property appraiser mails, publicizes this hearing. At this hearing, the school district

- a. Amends the tentatively adopted budget and millage rate and publicly announces the percent, if any, by which the re-calculated millage exceeds the rolled-back rate.
- b. Adopts a final millage and budget.

If the adopted millage rate is higher than the tentatively adopted rate presented in the TRIM notice, each taxpayer within the jurisdiction must receive notice of the increase by first class mail at the expense of the taxing authority.

Within 3 days of the final hearing

Send the resolution or ordinance adopting the final millage rate to the property appraiser, the tax collector, and the **department**.

- a. The taxing authority cannot levy any millages, except those approved by referendum, until the governing board of the taxing authority approves the resolution or ordinance to levy and submits it to the property appraiser and the tax collector.
- b. When the property appraiser receives the resolution or ordinance, it is official notice of the millage rate the taxing authority has approved (s. 200.065(4), F.S.).

Before the extension of the rolls, the property appraiser notifies each taxing authority of any aggregate change in the assessment roll from the preliminary roll. This includes changes resulting in Value Adjustment Board (VAB) actions or resulting from the correction of errors in the assessment roll.

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 8a

DATE OF SCHOOL BOARD MEETING: June 24, 2014

TITLE OF AGENDA ITEMS: First 12 month extension on Capital City Bank Construction Loan

DIVISION: Finance Department

PURPOSE AND SUMMARY OF ITEMS: To approve the first 12 month extension on the Capital City Construction Loan to pay next year's debt service that will become due and payable in the 2014-15 fiscal year.

FUND SOURCE: Capital Funds

AMOUNT: Two bi-annual payments due November 1, 2014 and May 1, 2015 totaling \$371,543.67

PREPARED BY: Kim Ferree

POSITION: Assistant Superintendent for Business Services

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

_____ Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered _____

CHAIRMANS'S SIGNATURE: page(s) numbered _____
Be sure that the Comptroller has signed the budget page.



October 17, 2013

Ms. Bonnie Wood
Assistant Superintendent for Business Services
Gadsden County School District
35 Martin Luther King, Jr. Blvd.
Quincy, FL 32351

Dear Ms. Wood:

I am pleased to inform you that Capital City Bank has approved a loan for the Gadsden County School District in an amount up to \$1,725,000. The loan is subject to the following terms and conditions:

Issuer / Borrower:	Gadsden County School District
Note Holder / Lender:	Capital City Bank
Use of Proceeds:	Proceeds will be used to complete the addition to and renovation of Havana Middle School
Loan Amount:	up to \$1,725,000
Expected Funding:	October 31, 2013
Structure:	The obligation will be created pursuant to 1011.14, Florida Statutes; the obligation will be tax-exempt and "Bank Qualified"
Origination Fee:	\$0
Lender's Counsel Fee:	\$1,500
Maturity:	As provided in Section 1011.14, Florida Statutes, the subject loan must mature within 12 months from the date of funding. At the request of Borrower, the obligation can be extended for an additional 12 months up to a maximum of 4 times for a total period of 5 years (the original 12-month term plus 4 additional 12-month extensions).
Amortization:	The note will be structured with level annual debt service. Upon payment of the first annual debt service installment, Borrower may request a 12-month extension from Lender and may request such extensions for each of 4 consecutive years after the note's original maturity resulting in an amortization period of 5 years from the date of funding.
Rates & Terms:	The interest rate is fixed for 5 years at 2.76%

Prepayment Option: The loan may be prepaid at any time without penalty

Security: The loan will be secured by a first priority lien on and pledge of all legally available revenues of Borrower in accordance with 1011.14 Florida Statutes, including Borrower's ad valorem taxes and other legally available revenues received by Borrower during any period in which the obligation is outstanding in an amount necessary to pay principal and accrued interest on the obligation as such become due and payable.

- Conditions:**
- 1) Lender must receive a copy of Borrower's authorizing resolution prior to funding.
 - 2) Borrower must designate the subject loan as a Qualified Tax-Exempt Obligation under 265(b)(3) of the Internal Revenue Code of 1986.
 - 3) Borrower will provide Lender a copy of its 8038G filing within 60 days of closing.
 - 4) Borrower is responsible for all closing costs including cost of Lender's counsel.

Covenants: 1) Borrower must maintain its primary banking relationship with Lender so long as the subject loan remains outstanding

If you have any questions, please contact me at 850-402-7743. This letter is valid until November 1, 2013. If you are in agreement with the above terms and conditions, please sign this letter in the space provided below and return a copy to me on or before its expiration date.

Sincerely,



Ramsay H. Sims
Senior Vice President, Institutional Banking

I am in agreement with the above terms and conditions.

Signature

Title

Print Name

Date

The School Board of Gadsden County, Florida
Revenue Anticipation Note, Series 2013 - Capital City Bank 2.76% Loan
Dated Date = 11/01/2013 Delivery Date = 11/01/2013

Dates	Term Bond Maturities	Bond Redemptions	Proceeds	Coupon Rate	Yield	Price	Interest Amount	Total Debt Service	Fiscal Year Debt Service
05/01/2014	-	162,056.83	162,056.83	2.760	2.760000	100.000000	23,805.00	185,861.83	-
11/01/2014	-	164,293.22	164,293.22	2.760	2.760000	100.000000	21,568.62	185,861.84	371,723.67
05/01/2015	-	166,560.46	166,560.46	2.760	2.760000	100.000000	19,301.37	185,861.83	-
11/01/2015	-	168,859.00	168,859.00	2.760	2.760000	100.000000	17,002.83	185,861.83	371,723.66
05/01/2016	-	171,189.25	171,189.25	2.760	2.760000	100.000000	14,672.58	185,861.83	-
11/01/2016	-	173,551.66	173,551.66	2.760	2.760000	100.000000	12,310.17	185,861.83	371,723.66
05/01/2017	-	175,946.68	175,946.68	2.760	2.760000	100.000000	9,915.16	185,861.84	-
11/01/2017	-	178,374.74	178,374.74	2.760	2.760000	100.000000	7,487.09	185,861.83	371,723.67
05/01/2018	-	180,836.31	180,836.31	2.760	2.760000	100.000000	5,025.52	185,861.83	-
11/01/2018	-	183,331.85	183,331.85	2.760	2.760000	100.000000	2,529.98	185,861.83	371,723.66
Total	-	1,725,000.00	1,725,000.00				133,618.32	1,858,618.32	1,858,618.32
Acc Int	-	-	-				-	-	-
Grand Ttls	-	1,725,000.00	1,725,000.00				133,618.32	1,858,618.32	1,858,618.32

TIC (Incl. all expenses) 3.36717049%	Average Coupon 2.76000003%	IRS Form 8038-G NIC = 2.760000% (with Adjstmnt of \$0.00). NIC = 2.760000% (with Adjstmnt of \$0.00).
TIC (Arbitrage TIC) 2.76000003%	Average Life (yrs) ... 2.81	
Bond Years 4,841.24	WAM (yrs) 2.806518	



P.O. Box 900, Tallahassee, FL 32302

Date of Notice

4/18/14

NOTICE OF PAYMENT DUE

This is a reminder that a payment on your loan will soon be due. Paying on or before the due date allows us to serve you promptly. Thank You.

LOAN NUMBER	6678501551	PRINCIPAL DUE	161,924.58
DUE DATE	5/01/14	INTEREST DUE	23,937.25
PRINCIPAL BALANCE	1,725,000.00	OTHER CHARGES	0.00
INTEREST RATE	2.7600%		
		TOTAL DUE	185,861.83

SCHOOL BOARD OF GADSDEN COUNTY
35 MARTIN LUTHER KING JR BLVD

		PLEASE REMIT WITH PAYMENT	
LOAN NUMBER	6678501551	PRINCIPAL DUE	161,924.58
DUE DATE	5/01/14	INTEREST DUE	23,937.25
PRINCIPAL BALANCE	1,725,000.00	OTHER CHARGES	0.00
INTEREST RATE	2.7600%		
		TOTAL DUE	185,861.83

SCHOOL BOARD OF GADSDEN COUNTY
35 MARTIN LUTHER KING JR BLVD

Please mail payment to:
CAPITAL CITY BANK
P.O. BOX 900
TALLAHASSEE FL 32302

TOTAL REMITTED \$ _____

⑆500200370⑆ 6678501551⑈

231 CC

(291) 1530 9200 710 principal 161 924.58 0061 6079
 720 interest 23,937.25 0061 0079
 740

DATE

SFS

THE SCHOOL BOARD OF GADSDEN COUNTY

PURCHASE ORDER NO.

08/16/13

185491

35 MARTIN LUTHER KING, JR., BLVD. QUINCY, FLORIDA 32351

PHONE (850) 627-9651 FAX (850) 627-2760

www.gcps.k12.fl.us

FL SALES TAX EXEMPTION # 85-8012621915C-2

FEDERAL ID # 59-6000615

VENDOR

FU02525000

SHIP TO THIS ADDRESS

U S FOODS - PORT ORANGE DIV
OFF BID ACC# 00792895
5425 S WILLIAMSON BLVD
PORT ORANGE FL 32124

SCHOOL FOOD SVC-GADSDEN CO
203-A MARTIN LUTHER KING JR BL
QUINCY FL 32351

PRINCIPAL / SUPERVISOR

Paula Milton

COMPTROLLER

Comie Red

SUPERINTENDENT

[Signature]

QUANTITY

PRODUCT NO.

DESCRIPTION

UNIT PRICE

TOTAL

SAM ✓

US FOOD-OFF BID PURCHASES 1314

Ad Apud: 11/19/13 (8d)

Table with 5 columns: QUANTITY, PRODUCT NO., DESCRIPTION, UNIT PRICE, TOTAL. Includes rows for SPECIAL ACCOUNT, OFF BID PURCHASES FOR LIMITED ITEMS, and a NOTE regarding authorized purchaser Paula Milton.

Increase \$4,500.00 for Smr School + Splies. 500.00

TOTAL 16,000.00

PAY TERMS: NET 30

DATE RECEIVED

BY

- 1. All correspondence/shipments must reflect the PO number. For prompt payment mail invoice to Accounts Payable address above.
2. [] If box checked and you accept this PO goods/services & invoice must be received by the District no later than June 15 of the CURRENT YEAR. NO FINANCIAL OBLIGATION continues after June 30 of the CURRENT YEAR if the box is checked. This PO is void after one year.
3. Notice to Vendor/Contractor: By acceptance of the contract/order in excess of \$10,000 and involving Federal Funds, the Vendor/Contractor agrees to comply with Title 34 Section 80.36 Code of Federal Regulations. Termination for cause and for convenience by the grantee or sub-grantee including the manner by which it will be effected and the basis for settlement will be decided by the School Board of Gadsden County. In addition, the Vendor/Contractor agrees to comply with Florida Statute 257.36 regarding retention of records for 5 years.

Table with 7 columns: FUND, FUNCTION, OBJECT, CENTER, PROJECT, PROGRAM, AMOUNT. Includes a row with a handwritten '9' in the OBJECT column.

ENCUMBRANCE



INVOICE

ACCOUNT NUMBER	INVOICE NUMBER	INVOICE DATE	CUSTOMER NUMBER	PURCHASE ORDER #	SALES LOCATION	SALES REP	DATE ORDERED
792895	2592114	05/15/2014	80792617		3055	643	05/13/2014
FREIGHT TERMS	ORDER NUMBER	PAYMENT TERMS	ROUTE NUMBER	SPECIAL INSTRUCTIONS			
	631792	NET 10 EOM	4281				

BILL TO	SHIP TO	REMIT TO
SCHOOL BD OF GADSDEN CTY 35 MARTIN LUTHER KING JR QUINCY, FL 32351 ATTN: DUSTY HOUSE (000) 000-0000	GD/ GADSDEN CTY WAREHOUSE 203 MARTIN LUTHER KING JR QUINCY, FL 32351 Dept.: 0 (850) 627-1276	US Foods, Inc. P.O. BOX 198421 ATLANTA, GA 30384-8421 (386) 763-1304

SHIPPED FROM: 5425 S. WILLIAMSON BLVD, PORT ORANGE, FL
SHIPPED DATE: 05/15/2014

DRIVER NAME: Rob Healey
DRIVER ID: 134233

ROUTE NUMBER: 4281
STOP NUMBER: 5

INVOICE LINE DETAILS												
QUANTITY			SALES UNIT	PRODUCT NUMBER	DESCRIPTION	LABEL	PACK SIZE	CODE	WEIGHT	PRICING UNIT	UNIT PRICE	EXTENDED PRICE
ORD	SHP	ADJ										
DRY												
1	1	0	CS	892091	PLATE, FM 9" 3 CMPT WHT	MONOGRAM	4/125 EA			CS	\$14.5400	\$14.54
1	1	0	CS	3055258	CUP, FM 12 Z WHT	DART	40/25 EA			CS	\$26.9300	\$26.93
1	0	0	CS	5315296	CHIP, PTATO CHEDR SOUR CRM	RUFFLES	104/1 OZ				\$0.0000	\$0.00
25	25	0	CS	8212995	APRON, N-WVN ADLT WHT 28X34	ATLNTCMILS	100 EA			CS	\$54.9600	\$1,374.00
50	50	0	CS	9037573	DETERGENT, POT & PAN MNL LIQ	DAWN	5 GA			CS	\$59.3000	\$2,965.00
1	1	0	CS	9315128	CHIP, PTATO REG PLN SS	LAY'S	104/1 OZ			CS	\$28.5200	\$28.52

PRODUCT CLASS RECAP							
PRODUCT CLASS	TOTAL PIECES ORDERED	TOTAL PIECES SHIPPED	TOTAL PIECES ADJUSTED	TOTAL PIECES DELIVERED	TOTAL ITEMS SHIPPED	TOTAL WEIGHT SHIPPED	TOTAL EXTENDED PRICE
DRY	79	78	0	78	5	2,279.00	\$4,408.99
DELIVERY SUMMARY TOTALS	79	78	0	78	5	2,279.00	\$4,408.99



INVOICE

ACCOUNT NUMBER	INVOICE NUMBER	INVOICE DATE	CUSTOMER NUMBER	PURCHASE ORDER #	SALES LOCATION	SALES REP	DATE ORDERED
792895	2592114	05/15/2014	80792617		3055	643	05/13/2014
FREIGHT TERMS	ORDER NUMBER	PAYMENT TERMS	ROUTE NUMBER	SPECIAL INSTRUCTIONS			
	631792	NET 10 EOM	4281				

DELIVERY SUMMARY

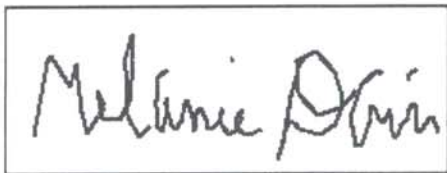
AS SHIPPED DELIVERY AMOUNT	\$4,408.99
Product Total Adjustments	\$0.00
Total Charges Adjustment	\$0.00
Total Allowance Adjustment	\$0.00
Sales Tax Adj: Rate: VAR	\$0.00
TOTAL ADJUSTMENT	<u>0.00</u>
DELIVERED AMOUNT	<u>\$4,408.99</u>

INVOICE SUMMARY

Product Total	\$4,408.99
Sales Tax	Rate: 0.00 <u>\$0.00</u>
PLEASE REMIT THIS AMOUNT BY 06/10/2014	<u>\$4,408.99</u>

CUSTOMER ACCEPTANCE

Interest shall accrue on all unpaid balances exceeding established credit terms at a rate equal to the lesser of (a) 1-1/2% per month or (b) the maximum rate that the customer may lawfully contract to pay, and in all events calculated in accordance with applicable law.



CUSTOMER SIGNATURE: melanie davis

SIGNED AT: 05/15/2014 02:34 PM (UTC)

We appreciate your business. Please visit our website www.usfood.com for a fast and easy way to order. Or contact customer service at: (800) 253-0277

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 8c

DATE OF SCHOOL BOARD MEETING: June 24, 2014

TITLE OF AGENDA ITEMS: Health Insurance Contract for 2014-2015

DIVISION: Insurance Committee and Finance Department

PURPOSE AND SUMMARY OF ITEMS:

Board approval is requested for the renewal of the medical insurance program. The Insurance Committee received and reviewed the renewal of the contract for health insurance premiums with Capital Health Plan (HMO) for the insurance year beginning October 1, 2014.

District will continue to pay 75% in accordance with collective bargaining.

FUND SOURCE: All Funds with Payroll

AMOUNT: Varies by Type of Coverage

PREPARED BY: Amy Howell

POSITION: Insurance Committee Chairman

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 8d _____

DATE OF SCHOOL BOARD MEETING: June 24, 2014

TITLE OF AGENDA ITEMS: New Optional Employee Benefits

DIVISION: Finance Department

PURPOSE AND SUMMARY OF ITEMS: Board approval to offer the District's employees two new products that the employee can select from during open enrollment or their new hire status. One product is a whole life insurance option with a guarantee issue for the first year and the other product offers an additional tax sheltered annuity to employees from our current 403 (b) vendor.

FUND SOURCE: Not applicable – cost is bore by the employee

AMOUNT: Information for employee selection amounts is include in the attached vendor.

PREPARED BY: Kim Ferree

POSITION: Assistant Superintendent for Business Services

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

_____ **Number of ORIGINAL SIGNATURES NEEDED by preparer.**

SUPERINTENDENT'S SIGNATURE: page(s) numbered _____

CHAIRMANS'S SIGNATURE: page(s) numbered _____

Be sure that the Comptroller has signed the budget page.



GADSDEN COUNTY SCHOOL DISTRICT

Your voluntary benefits proposal

Presented by: Alfred Lawson, Jr
Address: One Urban Centre
4830 West Kennedy Blvd, Suite 900
Tampa, FL
33609-9802
Telephone: (813) 207-2600
Fax: (813) 207-2692
Sales Team: Matthew Lane Arnold, Large Case Account Executive
Myra C Young, Sr. Sales Coordinator

Future-ready benefit solutions from Unum

Today's top trends — from the stalled economy to health care reform — are having a strong impact on business. Offering Unum voluntary benefits can help you address these important challenges, while doing what's best for your employees and your bottom line. It's a winning strategy for today and the future.

Why include Unum voluntary benefits in your plan?

Partnering with Unum can help you balance the need to manage costs and provide financial protection for your employees. Our voluntary benefits include easy implementation, effective education and responsive customer service.

At the foundation of the Unum offering is a full range of competitive benefits solutions that appeal to a diverse workforce:

- Accident insurance
- Critical illness insurance
- Disability insurance
- Life insurance

At a time when most employees have little or no savings to fall back on if they face an illness or injury — and a record low number of Americans have no life insurance at all — these coverages make perfect sense.

Voluntary benefits are budget neutral for the company and affordable for today's employees — a refreshing twist for employers who are looking to add more coverage.

Reform-friendly solutions

Many employers are concerned about the 40% "Cadillac" excise tax that will help fund health care reform.

Unum's voluntary benefits are HIPAA-excepted* plans, so they are not subject to the Cadillac tax.

While they give employees more financial protection, they do not increase the actuarial value of your health plan under the current law.

In 2010, Unum's voluntary sales were up 16%.

Since 2001, our voluntary benefits sales have tripled.

Why Unum?

Why choose Unum for your voluntary coverage? Our customers recommend us highly.¹ In fact, they give us the highest possible ranking for being "easy to do business with."

Unum is a Fortune 500 company, and we are ranked as one of America's Most Reputable Companies.²

Our company is built on a heritage of more than a century in the benefits business — evolving with business and employee needs — and we are a leading provider of voluntary coverage in the U.S.

Support for your company
and your employees

At Unum, our goal is to make sure you and your employees have the best benefits experience possible. So we offer expert service and support at every stage of the process — from pre-enrollment through claims.

We provide:

Effective education and enrollment capabilities, so employees appreciate the value of their benefits and make informed benefits decisions to best meet their financial protection needs.

Comprehensive administration services — Our people and technology help make it easier for you to manage your employee benefits.

A responsive claims process — Our team responds to claims submissions within four days, delivering fair, objective and thorough assistance during challenging times.

We are in the business of developing benefits solutions to help you build a stronger workforce, and ultimately, a stronger business.

Proven customer satisfaction

98% say they are likely to recommend Unum to others

98% say they are likely to continue using Unum benefits

94% gave Unum positive ratings for overall value

Benefits Summary: Whole Life

GADSDEN COUNTY SCHOOL DISTRICT

For Broker Use Only*

Whole Life Insurance

Unum's Whole Life insurance offers protection beyond an individual's working years, potentially for your lifetime. With a guaranteed death benefit that will never decrease, level premiums that will never increase, cash value accumulation, living benefits and other options, Whole Life goes beyond typical term life insurance.

Proposed coverage effective date: July 1, 2014
Number of eligible employees: 750
Eligibility class descriptions: Class 1: All Employees

<u>Plan Description</u>	<u>Class 1</u>
Family Coverage Options	Employee, Spouse and Child
Purchase Option Type	Volume Purchase
Purchase Option Type Child	Volume Purchase
Paid Up Option	Payable to Age 120, with option for Paid Up at Age 70 Paid Up at Age 70 Issue Ages 15-50 *Child always Paid Up at Age 70
Benefit Amounts	Employee - \$2,000 - \$200,000 in increments of \$1,000 Spouse - \$2,000 - \$50,000 in increments of \$1,000 Child - \$5,000 - \$50,000 in increments of \$1,000 *All Policies issued are subject to minimum premium limits
Issue Ages	15-80 - Employee and Spouse 14 days to 26 years - Juvenile
Rates	Employee and Spouse - Age last birthday, unisex, tobacco distinct Juvenile - Unisex
Coverage Effective Date	The first day of the month in which payroll deductions begin
Minimum Number of Applications Required for Policy to Issue	2% of approved adult applications based on total eligible employees
Participation Basis	Guaranteed Issue: GI is available from application one. Should participation at the initial enrollment event not meet the expected participation level, the Underwriting Offer may be changed for future enrollments.
Evidence of Insurability (Health Questions)	See grid below for details
Guaranteed Renewable	To age 120 - as long as the required premiums are paid
<u>Employee Elected Options</u>	
- Employee Term Rider	50% of the employee face amount *Issue Ages 15-60
- Accidental Death Benefit (ADB)	Coverage is equal to the face amount up to a maximum of \$150,000.
Enrollment Frequency	All Scheduled
Primary Enrollment Method	Face to Face

Benefits Summary: Whole Life

GADSDEN COUNTY SCHOOL DISTRICT

For Broker Use Only*

New Employee Waiting Period	30 days*	*For new employees who complete their waiting period on or after the plan effective date, coverage will begin on the first of the month following the date they are approved by Unum which is the first of the month payroll deductions begin.
Present Employee Waiting Period	0 days*	*This is the period of time that current employees must be actively employed before they are eligible for coverage.
Minimum Hours for Eligibility	20 hours per week	

States where enrollment will take place: FL
(Actual enrollment states will depend on product availability.)

Class 1

Evidence of Insurability (Health Questions)

Tier I Amounts	Tier II Amounts
Employee ages 15-50 (Volume Purchase) Health questions are not required for amounts up to \$100,000 benefit amount.	Employee ages 15-50 (Volume Purchase) Tier I and Tier II health questions are required for amounts over \$100,000 benefit amount, up to \$200,000 benefit amount.
Employee ages 51-80 (Volume Purchase) Health questions are not required for amounts up to \$100,000 benefit amount.	Employee ages 51-80 (Volume Purchase) Tier I and Tier II health questions are required for amounts over \$100,000 benefit amount, up to \$200,000 benefit amount.
Spouse ages 15-50 (Volume Purchase) One qualifying question is always required. Spouse may receive up to \$25,000 benefit amount Conditional Guaranteed Issue.	Spouse ages 15-50 (Volume Purchase) Tier II health questions are required for amounts over \$25,000 benefit amount, up to \$50,000 benefit amount.
Spouse ages 51-80 (Volume Purchase) One qualifying question is always required. Spouse may receive up to \$10,000 benefit amount Conditional Guaranteed Issue.	Spouse ages 51-80 (Volume Purchase) Tier II health questions are required for amounts over \$10,000 benefit amount, up to \$50,000 benefit amount.
Child (Volume Purchase) Health questions are not required for amounts up to \$25,000 benefit amount.	Child (Volume Purchase) Not Applicable

Rates and Cost Information

See Rate Sheets section below

Rates and Cost Information: Whole Life

GADSDEN COUNTY SCHOOL DISTRICT

For Broker Use Only*

Rates and Cost Information

Whole Life

Some rates and costs listed below may be applicable only to certain quotes and/or classes. Please see the "Plan Description" section of your Benefits Summary for specific plan details.

Premium illustrates base product premium only; optional rider premium is in addition to base premium.

The guaranteed interest rate is 4.5%. Surrender value will be reduced by any outstanding loans.

Employee and Spouse Volume Purchase				
Paid Up Age 120 Cash Value at 65				
Weekly premiums based on a volume purchase of \$10,000				
Issue Age	Premium	Cash Value	Premium	Cash Value
15	N/A	N/A	N/A	N/A
20	N/A	N/A	N/A	N/A
25	N/A	N/A	N/A	N/A
30	N/A	N/A	N/A	N/A
35	N/A	N/A	\$3.40	\$4,274
40	\$3.31	\$3,245	\$4.25	\$4,009
45	\$4.32	\$2,856	\$5.52	\$3,660
50	\$5.83	\$2,340	\$7.32	\$3,197
55	\$8.25	\$1,645	\$9.65	\$2,587
60	\$11.50	\$1,963	\$13.75	\$1,776
			\$18.72	\$2,024
Weekly premiums based on a volume purchase of \$25,000				
Issue Age	Premium	Cash Value	Premium	Cash Value
15	\$3.23	\$10,432	\$5.30	\$11,896
20	\$3.58	\$10,170	\$6.22	\$11,578
25	\$4.19	\$9,840	\$7.30	\$11,186
30	\$5.14	\$9,412	\$8.50	\$10,685
35	\$6.44	\$8,850	\$10.61	\$10,023
40	\$8.27	\$8,114	\$13.80	\$9,149
45	\$10.80	\$7,140	\$18.29	\$7,993
50	\$14.56	\$5,850	\$24.11	\$6,467
55	\$20.61	\$4,114	\$34.38	\$4,440
60	\$28.75	\$4,907	\$46.78	\$5,060
Weekly premiums based on a volume purchase of \$75,000				
Issue Age	Premium	Cash Value	Premium	Cash Value
15	\$9.70	\$31,295	\$15.88	\$35,687
20	\$10.72	\$30,512	\$18.65	\$34,734
25	\$12.57	\$29,518	\$21.90	\$33,557
30	\$15.42	\$28,237	\$25.50	\$32,054
35	\$19.32	\$26,552	\$31.82	\$30,068
40	\$24.80	\$24,340	\$41.40	\$27,446
45	\$32.38	\$21,421	\$54.87	\$23,978
50	\$43.66	\$17,549	\$72.32	\$19,401
55	\$61.82	\$12,340	\$103.13	\$13,321
60	\$86.25	\$14,720	\$140.34	\$15,181
Weekly premiums based on a volume purchase of \$100,000				
Issue Age	Premium	Cash Value	Premium	Cash Value
15	\$12.93	\$41,727	\$21.18	\$47,582
20	\$14.29	\$40,682	\$24.87	\$46,312

Rates and Cost Information: Whole Life

GADSDEN COUNTY SCHOOL DISTRICT

For Broker Use Only*

Weekly premiums based on a volume purchase of \$100,000

Issue Age	Premium	Cash Value	Premium	Cash Value
25	\$16.75	\$39,358	\$29.20	\$44,743
30	\$20.56	\$37,649	\$34.00	\$42,739
35	\$25.75	\$35,402	\$42.43	\$40,091
40	\$33.06	\$32,454	\$55.20	\$36,595
45	\$43.18	\$28,561	\$73.16	\$31,971
50	\$58.22	\$23,399	\$96.43	\$25,868
55	\$82.43	\$16,454	\$137.50	\$17,761
60	\$115.00	\$19,627	\$187.12	\$20,241

Weekly premiums based on a volume purchase of \$200,000

Issue Age	Premium	Cash Value	Premium	Cash Value
15	\$25.85	\$83,454	\$42.35	\$95,164
20	\$28.58	\$81,364	\$49.73	\$92,624
25	\$33.50	\$78,716	\$58.39	\$89,486
30	\$41.12	\$75,298	\$68.00	\$85,478
35	\$51.50	\$70,804	\$84.85	\$80,182
40	\$66.12	\$64,908	\$110.39	\$73,190
45	\$86.35	\$57,122	\$146.31	\$63,942
50	\$116.43	\$46,798	\$192.85	\$51,736
55	\$164.85	\$32,908	\$275.00	\$35,522
60	\$230.00	\$39,254	\$374.23	\$40,482

**Employee and Spouse Volume Purchase
Paid Up Age 70
Cash Value at 85**

Weekly premiums based on a volume purchase of \$10,000

Issue Age	Premium	Cash Value	Premium	Cash Value
15	N/A	N/A	N/A	N/A
20	N/A	N/A	N/A	N/A
25	N/A	N/A	N/A	N/A
30	N/A	N/A	\$3.30	\$4,972
35	\$3.11	\$4,227	\$3.87	\$4,881
40	\$4.10	\$4,088	\$4.89	\$4,757
45	\$5.57	\$3,886	\$6.51	\$4,583
50	\$7.92	\$3,578	\$8.88	\$4,334
55	N/A	N/A	\$12.17	\$3,962
60	N/A	N/A	N/A	N/A

Weekly premiums based on a volume purchase of \$25,000

Issue Age	Premium	Cash Value	Premium	Cash Value
15	\$3.75	\$11,235	\$5.93	\$12,742
20	\$4.14	\$11,131	\$6.97	\$12,604
25	\$4.92	\$10,996	\$8.24	\$12,431
30	\$6.09	\$10,815	\$9.68	\$12,203
35	\$7.76	\$10,567	\$12.23	\$11,892
40	\$10.25	\$10,219	\$16.27	\$11,458
45	\$13.93	\$9,716	\$22.21	\$10,836
50	\$19.80	\$8,946	\$30.42	\$9,904
55	N/A	N/A	N/A	N/A
60	N/A	N/A	N/A	N/A

Rates and Cost Information: Whole Life

GADSDEN COUNTY SCHOOL DISTRICT

For Broker Use Only*

Weekly premiums based on a volume purchase of \$75,000				
Issue Age	Premium	Cash Value	Premium	Cash Value
15	\$11.25	\$33,706	\$17.79	\$38,225
20	\$12.42	\$33,394	\$20.89	\$37,813
25	\$14.74	\$32,988	\$24.71	\$37,292
30	\$18.26	\$32,446	\$29.02	\$36,610
35	\$23.28	\$31,700	\$36.68	\$35,675
40	\$30.75	\$30,658	\$48.81	\$34,373
45	\$41.77	\$29,147	\$66.61	\$32,507
50	\$59.38	\$26,838	\$91.26	\$29,712
55	N/A	N/A	N/A	N/A
60	N/A	N/A	N/A	N/A

Weekly premiums based on a volume purchase of \$100,000				
Issue Age	Premium	Cash Value	Premium	Cash Value
15	\$15.00	\$44,941	\$23.72	\$50,966
20	\$16.56	\$44,525	\$27.85	\$50,417
25	\$19.66	\$43,984	\$32.95	\$49,723
30	\$24.35	\$43,261	\$38.70	\$48,813
35	\$31.04	\$42,267	\$48.91	\$47,566
40	\$41.00	\$40,877	\$65.08	\$45,830
45	\$55.70	\$38,863	\$88.81	\$43,343
50	\$79.18	\$35,784	\$121.68	\$39,616
55	N/A	N/A	N/A	N/A
60	N/A	N/A	N/A	N/A

Weekly premiums based on a volume purchase of \$200,000				
Issue Age	Premium	Cash Value	Premium	Cash Value
15	\$30.00	\$89,882	\$47.43	\$101,932
20	\$33.12	\$89,050	\$55.70	\$100,834
25	\$39.31	\$87,968	\$65.89	\$99,446
30	\$48.70	\$86,522	\$77.39	\$97,626
35	\$62.08	\$84,534	\$97.81	\$95,132
40	\$82.00	\$81,754	\$130.16	\$91,660
45	\$111.39	\$77,726	\$177.62	\$86,686
50	\$158.35	\$71,568	\$243.35	\$79,232
55	N/A	N/A	N/A	N/A
60	N/A	N/A	N/A	N/A

Child Volume Purchase
 Child Maximum Amount is \$7,000 in Washington
 Paid Up Age 70
 Cash Value at 65

Child weekly premiums based on a volume purchase of \$5,000		
Issue Age	Premium	Cash Value
0	N/A	N/A
1	N/A	N/A
2	N/A	N/A
3	N/A	N/A
4	N/A	N/A
5	N/A	N/A
10	N/A	N/A
15	N/A	N/A
26	\$1.29	\$2,220

Rates and Cost Information: Whole Life

GADSDEN COUNTY SCHOOL DISTRICT

For Broker Use Only*

Child weekly premiums based on a volume purchase of \$10,000

Issue Age	Premium	Cash Value
0	\$1.34	\$4,637
1	\$1.35	\$4,634
2	\$1.35	\$4,630
3	\$1.37	\$4,626
4	\$1.39	\$4,621
5	\$1.42	\$4,616
10	\$1.62	\$4,588
15	\$1.90	\$4,552
26	\$2.57	\$4,439

Child weekly premiums based on a volume purchase of \$25,000

Issue Age	Premium	Cash Value
0	\$3.35	\$11,593
1	\$3.36	\$11,584
2	\$3.37	\$11,575
3	\$3.41	\$11,564
4	\$3.46	\$11,552
5	\$3.53	\$11,540
10	\$4.04	\$11,469
15	\$4.74	\$11,379
26	\$6.42	\$11,098

Child weekly premiums based on a volume purchase of \$50,000

Issue Age	Premium	Cash Value
0	\$6.71	\$23,186
1	\$6.72	\$23,169
2	\$6.73	\$23,150
3	\$6.81	\$23,128
4	\$6.92	\$23,105
5	\$7.06	\$23,080
10	\$8.07	\$22,938
15	\$9.48	\$22,758
26	\$12.84	\$22,196

Employee Term Rider weekly premiums based on a volume purchase of \$5,000

Issue Age	Term Premium	Term Premium
15	N/A	N/A
20	N/A	N/A
25	N/A	N/A
30	N/A	N/A
35	N/A	\$0.48
40	\$0.56	\$0.62
45	\$0.75	\$0.80
50	\$0.99	\$1.06
55	\$1.43	\$1.40
60	\$1.99	\$2.00
		\$2.72

Employee Term Rider weekly premiums based on a volume purchase of \$12,500

Issue Age	Term Premium	Term Premium
15	\$0.50	\$0.74
20	\$0.52	\$0.80

Rates and Cost Information: Whole Life

GADSDEN COUNTY SCHOOL DISTRICT

For Broker Use Only*

Employee Term Rider weekly premiums based on a volume purchase of \$12,500		
Issue Age	Term Premium	Term Premium
25	\$0.65	\$0.98
30	\$0.81	\$1.21
35	\$1.06	\$1.54
40	\$1.39	\$2.01
45	\$1.87	\$2.66
50	\$2.49	\$3.51
55	\$3.57	\$5.00
60	\$4.98	\$6.80

Employee Term Rider weekly premiums based on a volume purchase of \$37,500		
Issue Age	Term Premium	Term Premium
15	\$1.49	\$2.21
20	\$1.57	\$2.39
25	\$1.94	\$2.95
30	\$2.44	\$3.63
35	\$3.17	\$4.63
40	\$4.18	\$6.02
45	\$5.62	\$7.98
50	\$7.46	\$10.52
55	\$10.70	\$15.00
60	\$14.94	\$20.41

Employee Term Rider weekly premiums based on a volume purchase of \$50,000		
Issue Age	Term Premium	Term Premium
15	\$1.98	\$2.94
20	\$2.10	\$3.18
25	\$2.59	\$3.93
30	\$3.25	\$4.84
35	\$4.23	\$6.17
40	\$5.58	\$8.03
45	\$7.49	\$10.64
50	\$9.94	\$14.02
55	\$14.27	\$20.00
60	\$19.91	\$27.21

Employee Term Rider weekly premiums based on a volume purchase of \$100,000		
Issue Age	Term Premium	Term Premium
15	\$3.96	\$5.89
20	\$4.19	\$6.37
25	\$5.17	\$7.87
30	\$6.50	\$9.67
35	\$8.46	\$12.35
40	\$11.15	\$16.06
45	\$14.98	\$21.27
50	\$19.89	\$28.04
55	\$28.54	\$40.00
60	\$39.83	\$54.42

Rates and Cost Information: Whole Life

GADSDEN COUNTY SCHOOL DISTRICT

For Broker Use Only*

Employee Term Rider Paid Up Age 70 for Base - 20 Year Term for Rider		
Employee Term Rider weekly premiums based on a volume purchase of \$5,000		
Issue Age	Term Premium	Term Premium
15	N/A	N/A
20	N/A	N/A
25	N/A	N/A
30	N/A	\$0.39
35	N/A	\$0.48
40	\$0.42	\$0.62
45	\$0.56	\$0.80
50	\$0.75	\$1.06
55	\$0.99	\$1.40
60	N/A	N/A
Employee Term Rider weekly premiums based on a volume purchase of \$12,500		
Issue Age	Term Premium	Term Premium
15	\$0.50	\$0.74
20	\$0.52	\$0.80
25	\$0.65	\$0.98
30	\$0.81	\$1.21
35	\$1.06	\$1.54
40	\$1.39	\$2.01
45	\$1.87	\$2.66
50	\$2.49	\$3.51
55	N/A	N/A
60	N/A	N/A
Employee Term Rider weekly premiums based on a volume purchase of \$37,500		
Issue Age	Term Premium	Term Premium
15	\$1.49	\$2.21
20	\$1.57	\$2.39
25	\$1.94	\$2.95
30	\$2.44	\$3.63
35	\$3.17	\$4.63
40	\$4.18	\$6.02
45	\$5.62	\$7.98
50	\$7.46	\$10.52
55	N/A	N/A
60	N/A	N/A
Employee Term Rider weekly premiums based on a volume purchase of \$50,000		
Issue Age	Term Premium	Term Premium
15	\$1.98	\$2.94
20	\$2.10	\$3.18
25	\$2.59	\$3.93
30	\$3.25	\$4.84
35	\$4.23	\$6.17
40	\$5.58	\$8.03
45	\$7.49	\$10.64
50	\$9.94	\$14.02
55	N/A	N/A
60	N/A	N/A

Rates and Cost Information: Whole Life

GADSDEN COUNTY SCHOOL DISTRICT

For Broker Use Only*

Employee Term Rider weekly premiums based on a volume purchase of \$100,000

Issue Age	Term Premium	Term Premium
15	\$3.96	\$5.89
20	\$4.19	\$6.37
25	\$5.17	\$7.87
30	\$6.50	\$9.67
35	\$8.46	\$12.35
40	\$11.15	\$16.06
45	\$14.98	\$21.27
50	\$19.89	\$28.04
55	N/A	N/A
60	N/A	N/A

Accidental Death Benefit (ADB) Rider
Paid Up Age 120

Weekly premiums based on a volume purchase of \$10,000

Issue Age	ADB	ADB
15	N/A	N/A
20	N/A	N/A
25	N/A	N/A
30	N/A	N/A
35	N/A	\$0.19
40	\$0.19	\$0.19
45	\$0.19	\$0.19
50	\$0.19	\$0.19
55	\$0.19	\$0.19
60	\$0.19	\$0.19

Weekly premiums based on a volume purchase of \$25,000

Issue Age	ADB	ADB
15	\$0.46	\$0.46
20	\$0.46	\$0.46
25	\$0.46	\$0.46
30	\$0.46	\$0.46
35	\$0.46	\$0.46
40	\$0.46	\$0.46
45	\$0.46	\$0.46
50	\$0.46	\$0.46
55	\$0.46	\$0.46
60	\$0.46	\$0.46

Weekly premiums based on a volume purchase of \$75,000

Issue Age	ADB	ADB
15	\$1.39	\$1.39
20	\$1.39	\$1.39
25	\$1.39	\$1.39
30	\$1.39	\$1.39
35	\$1.39	\$1.39
40	\$1.39	\$1.39
45	\$1.39	\$1.39
50	\$1.39	\$1.39
55	\$1.39	\$1.39
60	\$1.39	\$1.39

Rates and Cost Information: Whole Life

GADSDEN COUNTY SCHOOL DISTRICT

For Broker Use Only*

Weekly premiums based on a volume purchase of \$100,000		
Issue Age	ADB	ADB
15	\$1.85	\$1.85
20	\$1.85	\$1.85
25	\$1.85	\$1.85
30	\$1.85	\$1.85
35	\$1.85	\$1.85
40	\$1.85	\$1.85
45	\$1.85	\$1.85
50	\$1.85	\$1.85
55	\$1.85	\$1.85
60	\$1.85	\$1.85
Weekly premiums based on a volume purchase of \$200,000		
Issue Age	ADB	ADB
15	\$2.77	\$2.77
20	\$2.77	\$2.77
25	\$2.77	\$2.77
30	\$2.77	\$2.77
35	\$2.77	\$2.77
40	\$2.77	\$2.77
45	\$2.77	\$2.77
50	\$2.77	\$2.77
55	\$2.77	\$2.77
60	\$2.77	\$2.77
Accidental Death Benefit (ADB) Rider Paid Up Age 70		
Weekly premiums based on a volume purchase of \$10,000		
Issue Age	ADB	ADB
15	N/A	N/A
20	N/A	N/A
25	N/A	N/A
30	N/A	\$0.19
35	N/A	\$0.19
40	\$0.19	\$0.19
45	\$0.19	\$0.19
50	\$0.19	\$0.19
55	N/A	\$0.19
60	N/A	N/A
Weekly premiums based on a volume purchase of \$25,000		
Issue Age	ADB	ADB
15	\$0.46	\$0.46
20	\$0.46	\$0.46
25	\$0.46	\$0.46
30	\$0.46	\$0.46
35	\$0.46	\$0.46
40	\$0.46	\$0.46
45	\$0.46	\$0.46
50	\$0.46	\$0.46
55	N/A	\$0.46
60	N/A	N/A

Rates and Cost Information: Whole Life

GADSDEN COUNTY SCHOOL DISTRICT

For Broker Use Only*

Weekly premiums based on a volume purchase of \$75,000		
Issue Age	ADB	ADB
15	\$1.39	\$1.39
20	\$1.39	\$1.39
25	\$1.39	\$1.39
30	\$1.39	\$1.39
35	\$1.39	\$1.39
40	\$1.39	\$1.39
45	\$1.39	\$1.39
50	\$1.39	\$1.39
55	N/A	N/A
60	N/A	N/A
Weekly premiums based on a volume purchase of \$100,000		
Issue Age	ADB	ADB
15	\$1.85	\$1.85
20	\$1.85	\$1.85
25	\$1.85	\$1.85
30	\$1.85	\$1.85
35	\$1.85	\$1.85
40	\$1.85	\$1.85
45	\$1.85	\$1.85
50	\$1.85	\$1.85
55	N/A	N/A
60	N/A	N/A
Weekly premiums based on a volume purchase of \$200,000		
Issue Age	ADB	ADB
15	\$2.77	\$2.77
20	\$2.77	\$2.77
25	\$2.77	\$2.77
30	\$2.77	\$2.77
35	\$2.77	\$2.77
40	\$2.77	\$2.77
45	\$2.77	\$2.77
50	\$2.77	\$2.77
55	N/A	N/A
60	N/A	N/A

*Unless accompanied by the full proposal (Benefits Summary, Product Highlights and Proposal Conditions), the Rates and Cost information is not a complete description of the Unum products or services. Agreement to the terms of the full proposal is required before any coverage will take effect. Contact your Unum Representative for more details. **This quote will remain open until June 29, 2014 after which time it will automatically expire without notice or further action.**

Underwritten by the following subsidiary of Unum Group:

Provident Life and Accident Insurance Company
1 Fountain Square, Chattanooga, TN 37402

In New York, coverage is underwritten by:

First Unum Life Insurance Company
666 3rd Avenue, Suite 301, New York, NY 10017

Customer Acknowledgement of Proposal
GADSDEN COUNTY SCHOOL DISTRICT

Customer Acknowledgement of Proposal:

I acknowledge the terms, conditions, and plan design(s) outlined in this proposal.

.....
Employer Signature

.....
Position and Title
(type or print clearly)

.....
Date

1302481/235701



Allen, Mooney & Barnes
INVESTMENT ADVISORS

Mary Kathryn (Kate) Clark

Mrs. Clark is a Financial Advisor for Allen, Mooney & Barnes Investment Advisors, LLC. She is also a General Securities Representative, a Registered Investment Advisor Representative, and holds insurance licenses for Variable Life, Variable Annuities, Fixed Life, Fixed Annuities, Health and Disability Insurance.

She has been a guest Lecturer for the Retirement Planning Today Series taught at Florida State University as part of the Financial Educators Network. In 2011, she was personally endorsed by Dave Ramsey who is a nationally acclaimed financial author, radio host, television personality, and motivational speaker.

Mrs. Clark is an active member of the community, serving on the Corporate Board of Directors for the Gadsden Arts Center, a Past President of Business Networking International (BNI) – Capitol Action, member of the Tallahassee and Gadsden Chambers of Commerce, Access Tallahassee, Gadsden County Farm Bureau, and The Florida Cattlemen's Association.

4103(B) Approved Vendor

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Securities Offered Through Allen, Mooney & Barnes Brokerage Services, LLC. Member FINRA and SIPC

Product [ASpire 403(b) FundSource]

freedom to choose....

provide your 403(b) plan participants with the flexibility and choice to meet their retirement goals.

With the challenges of the new 403(b) regulations comes the opportunity to improve your employees' retirement future. As you prepare for your expanded duties you can count on our service, technology, and experience to assist you with the stewardship of the plan. We understand the frustration many employees are facing with not being able to continue contributions to their previous vendor of choice. In many cases, ASpire can provide the gateway to make deferrals to their current investment choices with our 403(b) FundSource Open Investment Platform. We are pleased to have the opportunity to present you with a service proposal for your 403(b) retirement plan.

THE PLATFORM OF INDEPENDENCE

Whether you want a Plan administration provider or have the internal staff to handle the details in-house, managing all the challenges of managing all of the roles and responsibilities of your Plan under the new regulations just got easier.

Sharing the common objectives of improving the retirement benefit for participants and simplifying the administration of the Plan, the ASpire online gateway structure enables access to centralized information and constructive communication from all parties involved with the Plan.

Customize Investment List

Recognizing the diverse investment needs of your participants, we offer access to thousands of no-load, no transaction fee funds available through our 403(b) FundSource program. Plan Sponsors may elect to customize the 403(b) FundSource program for their Plan by limiting the fund availability options at their discretion or by working with a "governing" investment advisor to develop fund benchmark criteria that will limit the fund options. At any time you may request to add (or delete) funds to your Plan based on availability at the 403(b) FundSource custodian.

THE ETFx SOLUTION

Exchange traded funds or ETFs are becoming an increasingly popular option in retirement plans. Unlike other defined contribution programs that offer ETFs, the ASpire offering has several key distinctions. With ASpire's innovative technology and the new 403(b) FundSource account, you can have both ETF and Mutual Fund options in the same account. ETFs are available to plans and accounts, of all sizes.

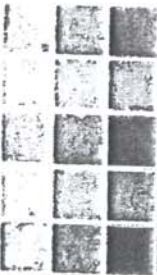
ASpire offers a true ETF product for 403(b) plans, not just a portfolio with underlying ETFs. With ASpire's 403(b) FundSource, ETFs are directly traded, allowing participants to own actual shares of the ETFs. ASpire's trade platform also aggregates and nets trades before going to market providing an innovative and cost effective solution.

DUE DILIGENCE

Vendor Compliance Questionnaire

We have completed the following frequently asked due diligence questions for your review. If requested, we will complete any RFI proposal document or provide additional information.

1. Does every 403(b) contract or account your organization would offer under the plan contain the required provisions governing deferral and contribution limitations, distribution restrictions and requirements nontransferability rules, and direct rollover requirements?
 Yes - We are capable of meeting all regulatory provisions that may be required under the plan.
2. Is your 403(b) account available to any employee who is otherwise eligible to participate?
 Yes - We have no minimum annual contribution restrictions.
3. Are contribution limits monitored by your organization on a periodic basis (including at least upon initial contribution, non-automatic changes, and upon request) for each employee who participates in your 403(b) contract or account, and does such monitoring include catch-ups for employees with at least 15 years of service with the Employer, and catch-ups for individuals age 50 and older?
 Yes - Complete contribution monitoring is built into the recordkeeping system.
4. If you learn that contributions are made in excess of contribution limits, will your organization correct the excess in accordance with the requirements of the regulations and notify the employee and Employer as appropriate?
 Yes - Current administrative procedures have notifications of excess contributions sent to the employee, participant, employer plan sponsor, and any designated third party administrator.
5. Are after-tax Roth contributions permitted under your 403(b) account, are they separately accounted for, and combined with pretax deferrals, monitored for compliance with deferral limitations?
 Yes - The recordkeeping system can accommodate a defined contribution source of the Plan. All applicable Plan contribution sources are tracked and monitored for limitations.



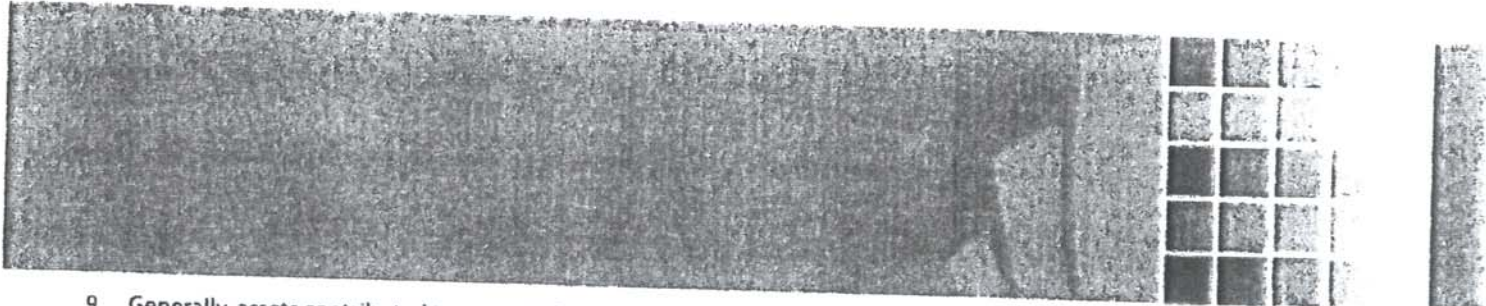
Creating a 403(b) plan
that works for everyone

- 1) compliant
- 1) flexible
- 1) coordinated
- 1) comprehensive
- 1) affordable

6. Does your contract permit transfers from other 403(b) plans and/or contracts and rollovers to or from other plan types (i.e. governmental 457(b), 401(k), etc.); and if so, are incoming rollovers separately accounted for to the extent required by the Code or for the Plan?
 Yes - The recordkeeping system will allow approved rollover types and are tracked in accordance with applicable governing Code and plan provisions.
7. Are loans permitted under an employee's 403(b) account?
 Yes - The recordkeeping system supports loans if permitted under the Plan. If loans are NOT permitted, the employee participant does not see the loan request module in the recordkeeping system

8. If loans are permitted, are they subject to applicable Code limitations including: (a) limitation of the amounts of the loan consistent with the 50%/\$50,000 limitations; (b) tax reported as a deemed distribution upon default consistent with applicable tax regulations; and (c) limited to repayment by payroll deduction if a participant maintains a defaulted loan balance?

Yes - All applicable Code and Plan limitations are adhered to within the recordkeeping system and administrative procedures. The recordkeeping system can accommodate loan repayments outside of the payroll deduction process - currently we require loan repayments to be made via payroll deduction.



9. Generally, assets contributed to your 403(b) program may not be distributed to an employee absent a distributable event such as death, disability, separation from service, attainment of age 59^{1/2}, or hardship (if the contract permits) or plan termination (beginning the earlier of the date the Employer adopts the Regulations or January 1, 2009). Will your organization monitor the distributions from contracts and/or accounts under the 403(b) program consistent with those restrictions, including (a) confirming an employee's severance of employment with the Employer, (b) obtaining sufficient documentation regarding hardship distributions as may be required under applicable regulations, and (c) coordinating with the Employer and/or other providers, as agreed between the Employer and providers, disclosing information necessary to comply with these requirements at the Plan level?



Yes - The recordkeeping system has built in safeguards regarding distributions. Furthermore, distribution monitoring procedures require notification and validation to ensure compliance with applicable regulations and Plan provisions. Cooperation with information sharing is expected.

10. In accordance with Section 401(a)(9) of the Internal Revenue Code, are participants required to take distributions beginning on the later of (i) the April 1st of the calendar year following the calendar year in which an employee attains the age of 70^{1/2}, or (ii) the April 1st of the calendar year following the calendar year in which the employee terminates employment, unless the employee is taking the required distributions from another qualifying 403(b) account? Are participants notified of these requirements upon reaching age 70^{1/2} and each year thereafter if applicable?

Yes - Employee participants are notified of Required Minimum Distributions (RMD). They may elect to receive distributions from the account or indicate via recorded correspondence that they are meeting the RMD from other applicable retirement accounts.

11. Does your platform permit distributions required by Qualified Domestic Relations Orders (QDROs)?

Yes - Documented and audited administrative procedures are in place regarding adhering to Qualified Domestic Relations Orders.

12. Will your organization agree to enter into a Provider Agreement and, as referenced in that Agreement, provide reasonable support to the Employer in the event of an IRS audit of the 403(b) plan?

Yes - We will enter into a Provider Agreement and provide support of any audit of the Plan.

13. Does your recordkeeping system include functions which can assist with compliance among multiple vendors [i.e., for purposes of monitoring contribution limits, loans (if applicable), and hardship withdrawals (if applicable)]?

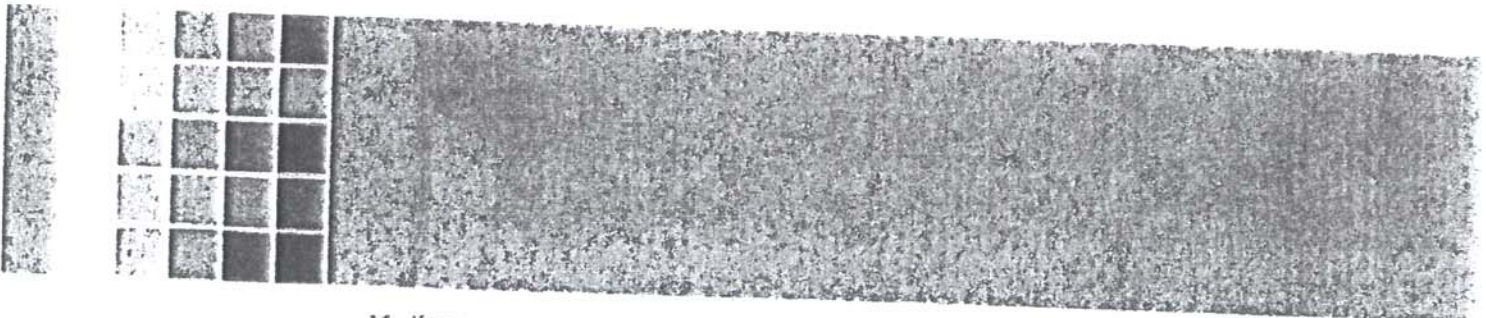
Yes - Complete online access to reports and archived transactional history regarding contributions, loans, and distributions is available to personnel and vendors approved by the Employer Plan Sponsor.

14. Is your organization willing to share information at the Plan Sponsor level to facilitate compliance with Section 403(b) of the Code and the regulations thereunder in a general file format?

Yes - The recordkeeping system includes preformatted reports and data extracts that facilitate the proper sharing of information with the regulations.

15. Is your organization willing to share information at the Plan Sponsor level pertaining to both active and inactive vendor data necessary to facilitate compliance with Section 403(b) of the Code and the regulations thereunder?

Yes - Yes, complete cooperation with information sharing at the Plan level is available to meet the compliance needs of the plan.



16. If your contract permits hardship withdrawals (please see question 9), is your program capable of reviewing and making determinations on hardship distributions, and making available information on such withdrawals to the Employer or another party?

Yes - Complete online access to reports and archived transactional history regarding distributions is available to personnel and vendors approved by the Employer Plan Sponsor.

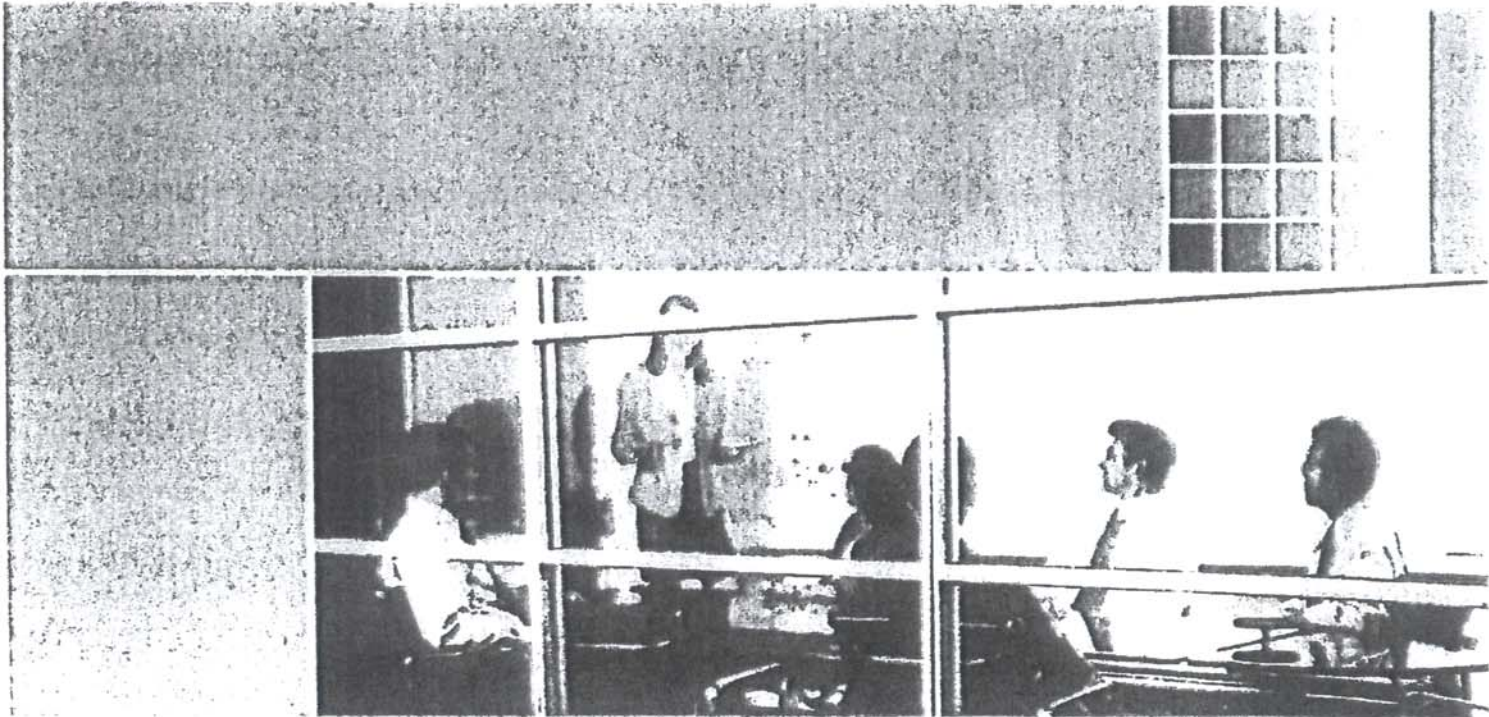
17. If the Plan permits hardship withdrawals (please see question 9), does your system facilitate cessation of deferrals for a period of six months for any employee who received a hardship distribution?

Yes - The recordkeeping system includes built-in safeguards regarding hardship distributions. If an employee participant's hardship distribution is approved, a "hardship basis date" is generated to prevent contributions for the regulatory six-month waiting period.

18. If the Plan permits hardship withdrawals (please see question 9), does your system assist the sponsor by facilitating recommencement of deferrals for any participant who received a hardship distribution upon the satisfaction of the six-month suspension period?

Yes - Once the "hardship basis date" is completed, the system will permit the recommencement of deferrals. Employee census reports reflect any participant "hardship basis date" - it is the responsibility of the payroll provider for recommencement of deferrals.

19. Are the sponsor organization's participant records maintained at the Employer Group level?
- Yes - Yes, complete cooperation with information sharing at the Plan level is available to meet the compliance needs of the Plan.
20. Is your organization able to provide plan level reports to the plan sponsor online, including information regarding loans, hardship withdrawals, and other withdrawals?
- Yes - Yes, the Plan Sponsor Gateway provides plan level reports on demand, including information regarding loans, hardship withdrawals and other withdrawals.
21. Does your organization have a policy in place to protect the confidentiality of any information that is shared by your organization with the Plan Sponsor and/or the Plan Sponsor's assignees or designees?
- Yes - Yes, complete information in regard to data security and confidentiality of information is available through our Provider Agreement
22. Can your organization provide remittance data in a general file format via FTP or remote Web site download and fund the remittance file via Federal funds wire or credit ACH?
- Yes - Yes, ASPIre can provide remittance data in multiple formats, and can remit via wire transfers and ACH.
23. Do you maintain Errors and Omissions or similar insurance covering the services proposed in your responses above? If so, will you provide documentation of such coverage upon request?
- Yes - Yes, ASPIre maintains E&O insurance as required, and will provide documentation of such coverage upon request.



About [ASpire Financial Services, LLC]

Our goal is to provide the most advanced, cost-effective recordkeeping and communication platform solution. We aim to provide these services at a superior quality to a diverse client base. As our business grows, we will maintain superior client service with the highest degree of excellence in every contact. We strive to build solid relationships with third party administrators, advisors, sponsors and participants by demonstrating our extensive industry knowledge and experience. We have solutions to support all the retirement benefits of all participants.

ACCREDITED SERVICE PROVIDER

Setting a high standard for the service of your plan.

ASpire developed one of the most advanced recordkeeping technologies that has positioned the company as an industry leader, bringing together world-class products and services. The Company operates with the utmost integrity, with full fee transparency to all of its clients.

ASpire strives to deliver the industry's highest service levels. This continuous commitment to excellence is evident by a number of self-imposed audits, accreditations and continuing education for all professional staff members.

ASpire undergoes a SSAE 16 1 audit of its processes and procedures each year and, in recognition of its adherence to the industry's best practices, ASpire has received the prestigious CeFex Certification for Recordkeepers. ASpire also maintains membership in industry associations, such as the American Society for Pension Professionals and Actuaries (ASPPA), to stay current with the changing landscape of retirement plan rules and regulations.



SERVICE

ASpire maintains a professionally trained Retirement Call Center to continue its commitment to serving clients for all their retirement plan needs.

ACTIVITY

Our platform was designed for the Internet - not adapted to it. ASpire's technologies provides a comprehensive online user experience that blends communication, collaboration and transparency.

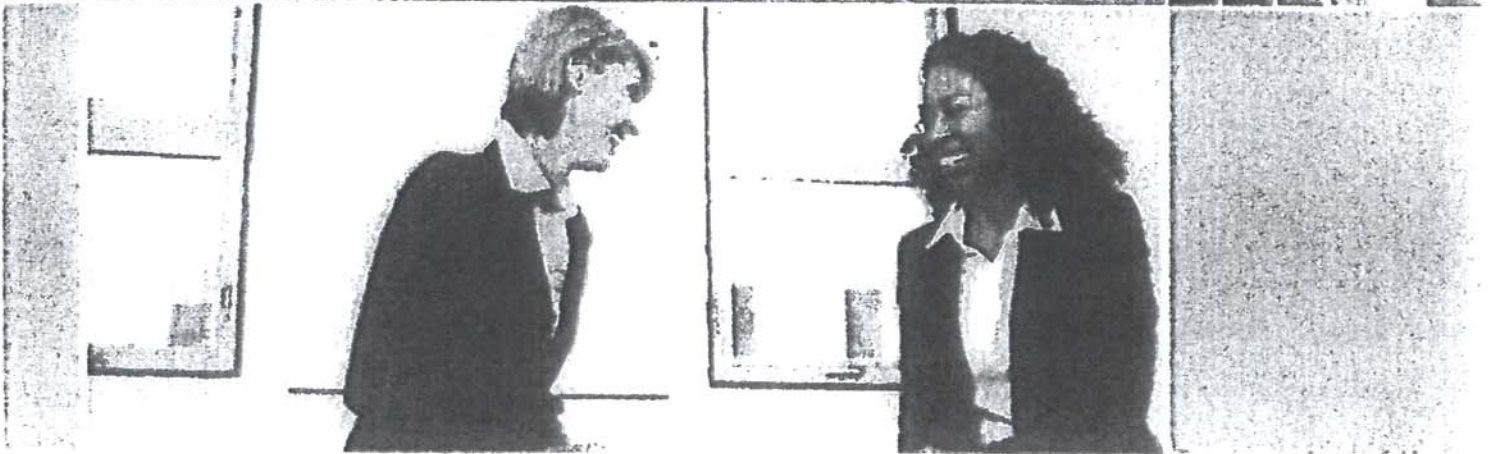
EXPERIENCE

Formed in 2002, ASpire represents decades of experience in plan administration, product development, information technology and the servicing of retirement products. With the 2011 acquisition of InvestLink Technologies, ASpire now services over 275,000 participants with more than \$10 billion in recordkeeping assets.

Services [Investments]

Investment offerings for your benefit only...

OBJECTIVE | FLEXIBLE | TRANSPARENT



THE PLATFORM OF OPTIONS

Meet the diverse investing needs of your Plan Participants.

Participants generally want to continue to work with the same, familiar, trusted service providers. The ASpire platform maintains that freedom with Open Architecture. Open Architecture enables our clients to configure the investment offering suited to their clients' needs. It allows us to serve as an objective service provider, offering funds without the potential for the conflicts of interest that many other firms encounter. We have an open investment platform with thousands of no-load, no-transaction fee funds. This open investment platform is what sets us apart from many of our competitors.

The centerpiece of Open Architecture is the freedom to select any available investments offered by the custodian, which allows access to thousands of brand name investments and Fixed Annuity products.

The recent addition of Fixed Annuity products provides an added investment strategy for you and your employees. These are fixed return annuity products which trade on the NSCC, giving your participants benefits such as:

- No additional annuity paperwork for participants - just select the Daily Value Fixed fund on the enrollment form.
- Simple plan level agreement for the sponsor to add the product to available investments for the plan.
- Unrestrictive - participants have the ability to move to other plan options without any surrender charge penalties.
- Annuity income options - participants may be able to convert their balance to an immediate annuity upon retirement providing them with a variety of payout options, including income they can't outlive to help provide peace of mind and financial security.

Features [Plan Sponsor]

As part of our offering:

Plan sponsors can take advantage of the Plan Sponsor Gateway website. The Plan Sponsor Gateway gives you the flexibility to streamline administrative processes, thus reducing the paperwork and manual processing associated with retirement plans.



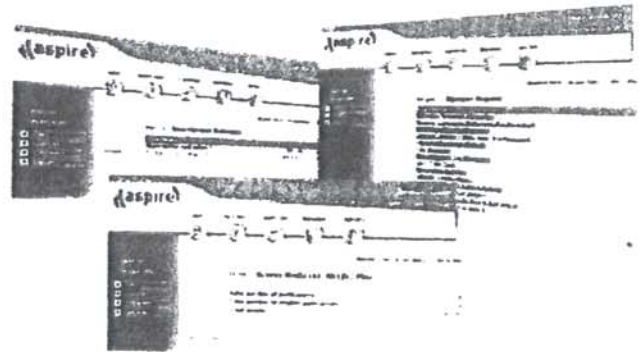
PLAN PROFILE

Plan Investments + Balances

Plan sponsors are able to view a summary of all approved investment options and the overall balances. For easy reference the available plan investments have built in informational links to the funds.

Employee Census

The Participant Module allows the plan sponsor to add or modify data relating to a company's employee profile including contact information, division or department, plan status, eligibility, loan balances, and any account activity.



TRANSACTION PROCESSING

Contributions

The platform allows authorized users to process regular as well as special contributions, such as exchanges, transfers and rollovers. Contribution payroll information can be uploaded directly into the system, or users can key data into the contribution processing grid. The system will perform automatic validation and initiate an Electronic Funds Transfer (EFT).

Loans + Distributions

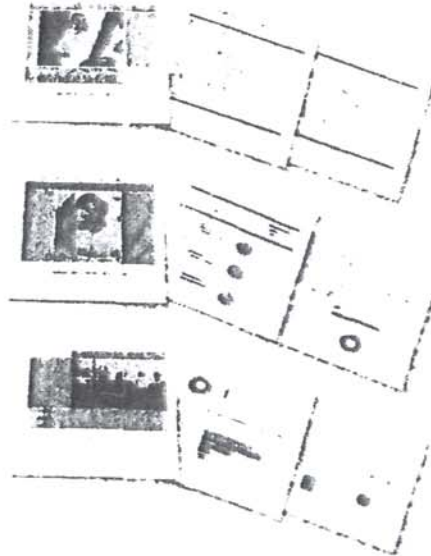
The online Participant Gateway allows participants to request loans and distributions from their account based on the plan provisions. The system dynamically generates customized signature-ready PDF documents for the participant to print, sign, and submit for processing. At the Plan Sponsor Gateway, the processing panel displays a list of pending loan and distribution requests submitted by plan participants which authorized plan administration user(s) can approve or deny online.

REPORTS + EXPORTS

Plan Reports

Comprehensive reporting is available online in the reports module of the Plan Sponsor Gateway. All reports are instantly created and available in multiple formats including PDF, EXCEL, Text, TIFF and HTML. All formats can be printed or archived. Reports include:

- Plan Statement
- Plan Investments
- Contribution Summary
- Deferral Changes Report
- Summary Participant Statements
- Participant Investment Elections
- Participant Balances by Source/Fund
- Plan Census
- Active Loans
- Delinquent Loans
- Required Minimum Distributions
- Fee Summary



Plan Exports

In addition to the defined reports, the platform allows you to export data in EXCEL and ASCII formats to import to other reporting engines. Exports include:

- Participant Census Data
- Participant Census & Source Activity
- Balance & Trade History

Some of the Plan Sponsor Gateway functions include:

- 1) Access Plan Investments
- 1) Edit and Configure Employee Data
- 1) Process Contributions
- 1) View/Approve Loans and Distributions
- 1) View Participant Activity
- 1) Access Forms and Reports

PLAN COMMUNICATIONS

Message System

The ASPIRE platform's built-in message system for plan sponsors allows for correspondence among all users defined within the plan, including TPAs, advisors, sponsors and participants.

The Message System enables two-way communication functionality between plan sponsors and participants. For example, plan sponsors can send bulletin messages to all participants to keep abreast with plan notices, and participants can request loans or distributions. Other features include the notification system which signal when, for example, a participant changes a deferral rate or uses the Help Desk. These participant activities trigger the system to generate an email to the designated users of the Plan Sponsor Gateway.

Plan Library

Operational forms and important plan documents can be archived in the Library section of the plan. The plan sponsor is able to restrict which documents are posted and available for participants to view and download in the Participant Gateway. The Library is a convenient and effective system for managing and accessing all of the plan's documentation, as well as providing verification of document availability.

Features [Plan Participant]

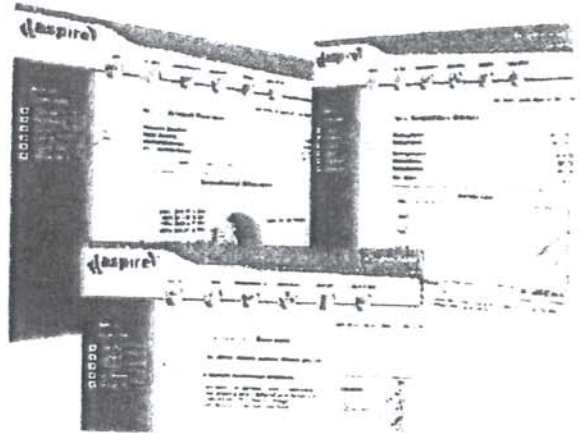
Saving, Planning and Investing...



ACCOUNT PROFILE

Plan Investments + Balances

Plan Participants are able to view a summary of all plan-approved investment options. For easy reference, the available plan investments have built-in informational links to the funds. Account balances by investment and by source are displayed in user-friendly graphical charts and tables listing investment name, shares and allocation percentages.



Personal Rate of Return

To find out how their account is doing, participants can select a start and end date range to have the system calculate a rate of return for their investment portfolio. This is very helpful in charting participant progress, developing an effective investment structure, and encouraging participant engagement.

ACCOUNT MANAGEMENT

Investments

With just a few quick clicks of the mouse, participants can manage the direction of their investments, including elections for ongoing contributions, exchanges between investment options, realignment of current portfolio allocations and rebalancing of the account.

Loans + Distributions Processing

The online Participant Gateway allows participants to request loans and distributions from their account based on the allowable plan provisions. The system dynamically generates customized, signature-ready PDF documents for the participant to print, sign and submit for processing.

STATEMENTS + ACTIVITY

Statements

Participants can easily generate an account statement with variable date ranges on demand. In addition, ASPire will automatically send a quarterly statement to each participant's address on record.

Account History

Knowing the transactional history of their account is an important right of any participant. Within the reports module of the Participant Gateway, the history function provides access to all transactions by date, investment, contribution source and transaction type (e.g., contributions, distributions, earnings, etc.). The ASPire system does not purge transactional history of participants' accounts.



The online Participant Gateway gives employees powerful access to manage their retirement accounts, including:

- 1) Enrolling in the plan
- 1) Viewing account balances
- 1) Researching investment options
- 1) Directing investment elections
- 1) Retirement and investment education
- 1) Loan and distribution requests
- 1) Personal rate of return reports
- 1) Viewing and printing statements

EDUCATION CENTER

To meet the ongoing educational needs of participants, the Participant Gateway has a built-in Education Center to help participants with investing and saving for their retirement. The Education Center contains:

- Articles on the fundamentals of investing
- Guides to understanding retirement accounts
- Market and fund research quotes and charts
- Suite of interactive calculators
- FAQs and Glossary of terms
- Videos

COMMUNICATIONS

Plan Library

Operational forms and important plan documents can be archived in the Library section of the plan. Participants have quick and easy access to view and download any relevant plan forms, notices, disclosures and application forms from any of the approved investment service providers within the plan.

Help Desk

Participants seeking assistance with the website, administrative or investment related questions can access the help desk feature in the Plan Services Module. The help desk utilizes the built-in message system that sends an email to the administration personnel for the plan or the authorized agent on their account.

Fees + Next Steps

Keeping it affordable...

Along with the employer/plan sponsor, ASpire serves as an advocate to the participant. As such, ASpire is mindful of the expense incurred with the operation of retirement plan benefits and shares the concerns of Plan Sponsors regarding costs that reduce the benefits available for each participant at retirement.

FEES

EMPLOYER

NO PLAN SET-UP FEE

NO ANNUAL PLAN MAINTENANCE FEES

EMPLOYEE 403(b)(7) Custodial Account

ANNUAL PARTICIPANT FEES

Account Maintenance:

Custody Administration:

TRANSACTION FEES:

Distribution:

Loan originations:



NEXT STEPS

If you're ready to take the stress out of managing your retirement plan and provide an environment to meet the diverse needs of your employees' retirement, just follow these steps.

1

Send us your Information Sharing Agreement and TPA Services Agreement. Also include any other applicable vendor agreements. We will sign the Information Sharing Agreement and keep your TPA and vendor agreements on file as a reference for plan provisions.

2

Execute a Plan Establishment Guide (PEG) to set up your ASpire retirement plan. You can download this document using the "Plan Search" option at www.403bplan.info or contact our Plan Establishment Department for questions. Send us the completed PEG and Summary Plan Description if available.

3

Direct your employees to our website for Account Applications. Employees can download the 403(b)(7) Account Application from www.aspire403b.com. Once a completed Account Application is received in good order, we will establish each employees' respective account under your plan on the platform.

Additional questions? Please contact us.

p 866.634.5873 | sales@aspireonline.com
 ASpire Financial Services | 4010 Boy Scout Blvd | Suite 500 | Tampa, FL 33607

The comments in this brochure reflect ASpire's understanding of the current tax laws or regulations relating to retirement plans. Neither ASpire nor its agents are authorized to give legal or tax advice and this brochure should not be construed as such advice. Please consult a tax advisor or the IRS or DOL websites for answers to tax or compliance questions.

R. Smith

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 8e

DATE OF SCHOOL BOARD MEETING: June 24, 2014

TITLE OF AGENDA ITEM: Rate Increase for NEOLA

DIVISION:

____ This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM:

Addendum B and Addendum C were effective April 1, 2013. The semi-annual regular updates increased from \$1,250 to \$1,450. The reimbursable rates for meals associated with visits also were increased. The hourly rate for additional consulting was, in effect reduced from \$350 per hour if 2 associates were present or \$175.00 per hour if only one associate was present to \$265 per hour for 2 associates and \$150 per hour for one.

FUND SOURCE: General Revenue

AMOUNT: as invoiced

PREPARED BY: *RWS* Rosalyn W. Smith

POSITION: Deputy Superintendent

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

____ Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered _____

CHAIRMAN'S SIGNATURE: page(s) numbered _____

REVIEWED BY: _____

Addendum C: Charge for Additional Consulting

The NEOLA Associates who will work with the District during implementation are Ms. Amanda Clapp, Esq., Mr. Tom Wittmer, Esq. Mr. Tom Young, Esq., and/or Dr. Richard Clapp.

As set forth in Addendums A and C, at least two (2) NEOLA Associates will be present during each drafting session required to complete the procedures in accordance with numbers 2 in Addendum A (pages 12-17).

When the District begins to draft the administrative procedures, the District will be billed for the time spent by Associates designated in this addendum, in quarter hour increments, at the hourly rate of \$265.00 per hour. If only one (1) of the designated NEOLA Associates is present at these additional drafting sessions, the District will be billed for the time spent by that Associate, in quarter hour increments, at the hourly rate of \$150.00 per hour.

With regard to the continuing update service as described in Section V of the License Agreement (pages 2-4), it is understood that at least two (2) NEOLA Associates will be present during each session for each regular update, unless there are extenuating circumstances that prevent the two (2) designated associates from attending or unless the District and NEOLA agree that only one (1) of the designated associates will make the visits related to an update. It is also understood that, if more than two and one-half (2.5) hours are required for an update session, the District will be invoiced for the additional time spent by the Associates designated in this addendum, in quarter hour increments, at the hourly rate of \$265.00 per hour. If only one (1) of the designated NEOLA Associates is present at an update session, the District will be billed for the additional time spent by that Associate, in quarter hour increments, at the hourly rate of \$150.00 per hour.

Further, the District agrees to pay, when invoiced, for the hourly charges for additional consulting time as described above, and for the designated Associates' expenses for all meetings scheduled to complete the work for which this additional time is required, including mileage at the current IRS rate, meals at the rate set forth in Addendum B, tolls, parking, lodging and airfare (if required) at the actual cost incurred. The District also agrees to pay, when invoiced, for the expenses of Dr. Richard Clapp, Mr. Patrick Corbett, and/or Ms. Amanda Clapp for all meetings they attend, including mileage at the current IRS rate, meals at the rate set forth in Addendum B, tolls, parking, lodging and airfare (if required) at the actual cost incurred.

Addendum B: Schedule of Additional Charges

The charges for NEOLA's additional products and services are as follows:

A.	Subscription to Update Service	\$1,450.00 per update
B.	Hourly rate for consultation in excess of the time provided in conjunction with the Bylaws and Policy Development Service, Administrative Procedures Development Service, and/or the Update Subscription	(see Addendum C)
C.	Hourly rate for any additional processing as required during the Bylaws and Policy Development Service, Administrative Procedures Development Service, and/or in conjunction with the Update Subscription	\$ 40.00 per hour
D.	Hourly rate for posting documents to the District's NEOLA Policy website that are not in conjunction with the Update Subscription	\$ 85.00 per hour
E.	Per draft cost for additional copies of any draft or Finalized Edition of the Bylaws and Policies, Administrative Procedures, and/or Update Templates in excess of the number provided pursuant to this Agreement and any Addendums thereto	\$ 35.00 per manual
F.	Per book cost for additional copies of Board Approved Editions of the Bylaws and Policies or District Approved Editions of the Administrative Procedures in excess of the number provided pursuant to this Agreement and any Addendums thereto	\$ 35.00 per manual
G.	Additional per unit cost for D or E above if provided in a notebook with tabs	\$ 15.00 per manual
H.	Per page cost for copying any excess materials requested by the District	\$ 0.05 per page
I.	Shipping and handling, per shipment	\$ 6.00 plus actual UPS charges
J.	Annual maintenance fee for electronic publishing	\$ 750.00 per year
K.	Mileage	@ current IRS rate
L.	Archival copy of an updated version of the Board Approved Edition of the Bylaws and Policies & District Approved Edition of the Administrative Procedures	\$ 250.00 per copy plus shipping and handling per H above
M.	Expenses – Breakfast (if required to leave before 6:00 a.m.)	\$ 10.00 per person
	Lunch	\$ 15.00 per person
	Dinner (if travel extends beyond 8:00 p.m.)	\$ 35.00 per person

NEOLA reserves all rights to modify any of the scheduled prices above.

These prices are effective as of April 1, 2013.

Submitter

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 8f

DATE OF SCHOOL BOARD MEETING: June 24, 2014

TITLE OF AGENDA ITEM: Letter of Agreement between GCCTA and GESPA and
GCSB

DIVISION:

 This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM:

This Letter of Agreement establishes a pay schedule for after school and summer school programs for 21st Century and rates of pay for professional development activities for this grant.

FUND SOURCE: N/A

AMOUNT: N/A

PREPARED BY: Rocky Pace 

POSITION: Chief Negotiator for Collective Bargaining _____

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

 Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered _____

CHAIRMAN'S SIGNATURE: page(s) numbered _____

REVIEWED BY: _____

LETTER OF AGREEMENT

The Gadsden County Classroom Teachers Association and
The Gadsden Educational Staff Professional Association and
The Gadsden County School District

The Gadsden County Classroom Teachers Association (GCCTA), the Gadsden Educational Staff Professional Association (GESPA), and the Gadsden County School District (GCSD) hereby tentatively agree to the provisions set out below.

Summer School and After School Salaries

All eligible highly qualified/certified teachers and highly qualified instructional paraprofessionals hired during the after school and summer school program(s) for 21st Century Community Learning Centers (CCLC) and Title I will be paid on the following schedule. The schedule is the same as it has been approved by the Department of Education in the specific grant application budgets for Gadsden County for at least the past five years. The schedule is at the same rate of pay that teachers and paraprofessionals have agreed to and are paid during the regular school year for after school programs. It is also a practice that has been recurring since 2009 for the federally funded after school and summer programs. Per the most recent Board Approved Miscellaneous Salary Schedule, instructional employees who participate in special duty and workshops funded by special grants beyond their normal work day and year "...may be paid up to but not to exceed their normal hourly salary rate, as called for in the specific grant." Rates proposed to be paid for summer school and after school grant activities are below:

Professional Status	Hourly rate of Pay
Certified Highly Qualified Teachers	\$20.00 per hour plus applicable benefits
Instructional Paraprofessionals	\$12.00 per hour plus applicable benefits
Custodial Staff	\$10.00 per hour plus applicable benefits
Transportation Staff (bus drivers)	\$15.00 per hour plus applicable benefits

Professional Development Activities

In an effort to provide every school administrator, teacher, paraprofessional, behavior specialist, and counselor with the broadest opportunity to participate in professional development (in-service) activities during the summer and hours beyond the regular school day, and to help them earn continuing education credits to sustain and/or enhance their professional credentials, Gadsden County Federal Title Programs will be offering several optional opportunities for professional development. In accordance with Article IX General Employment Practices subsection C of the GCCTA contract. "In-service activities are designed to improve the professional growth of all teachers. In-service attendance shall be voluntary..." The rates in the schedule below reflect the same rates paid in reimbursement for mandatory attendance of teachers and administrators at Florida Department of Education (FDOE) trainings for Differentiated Accountability and other School Improvement activities. The rates are also aligned with what was previously approved under a Letter of Agreement with the Bargaining Units for Common Core Professional Development during Summer 2014. Compensation for attending these optional in-service trainings is proposed to be paid according to the following schedule based on the number of hours of attendance:

Teachers; Administrators (beyond existing contractual salary for 11 or 12 months of service); School Counselors; and Behavior Specialists	Rate(s) of Pay
Single hour trainings/workshops (defined as no less than one hour and no more than two hours)	\$20.00 per hour plus applicable benefits

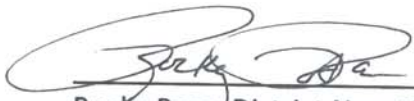
Half day of training/workshops (defined as more than two hours and no more than three and one-half hours)	\$50.00 flat rate plus applicable benefits
Full day of training/workshops (defined as more than four hours and no more than six hours)	\$100.00 flat rate plus applicable benefits
Paraprofessionals	Rate of Pay
Single hour trainings/workshops (defined as no less than one hour and no more than two hours)	\$12.00 per hour plus applicable benefits
Half day of training/workshops (defined as more than two hours and no more than three and one-half hours)	\$35.00 flat rate plus applicable benefits
Full day of training/workshops (defined as more than four hours and no more than six hours)	\$70.00 flat rate plus applicable benefits

This Letter of Agreement shall expire July 30, 2015.

Gadsden County School District

Roger Milton, Chairperson Date

Reginald C. James, Superintendent Date



Rocky Pace, District Negotiator 6/10/14 Date

Roger Milton, Chairperson Date

Reginald C. James, Superintendent Date


Rocky Pace, District Negotiator 6/10/14 Date

Gadsden County Classroom Teachers Association


GCCTA President 6/10/14 Date

GCCTA Chief Negotiator Date


Michael Monroe, Director BBSU 6/10/14 Date

Gadsden Educational Staff Professional Association

GESPA President Date

GESPA Chief Negotiator Date


Michael Monroe, Director BBSU 6/10/14 Date

SUMMARY SHEET

R. W. Smith
GADSDEN SCHOOL BOARD
OFFICE OF ASSISTANT
SUPERINTENDENT
2014 JUN 17 PM 5:37

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 8g

DATE OF SCHOOL BOARD MEETING: JUNE 24, 2014

TITLE OF AGENDA ITEM: Agreement between Cumberland Therapy Services, LLC, and Gadsden County School Board

DIVISION: EXCEPTIONAL STUDENT EDUCATION

YES This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM :(Type and Double Space)

This contract will provide psychological services (including, but not limited to assessments, evaluations, counseling, consulting, collaboration, intervention services, and support to families, school staff and administrators).

SOURCE: IDEA

AMOUNT: \$61.00 per hour

PREPARED BY: *SB*
Sharon B. Thomas

POSITION: Director of Exceptional Student Education

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

2 Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered 2

CHAIRMAN'S SIGNATURE: page(s) numbered _____

SCHOOL BOARD ATTORNEY: page(s) numbered _____

This form is to be uplicated on light blue paper.

PROOF READ BY: *Margaret D Brunson*



AGREEMENT

This Agreement is made and entered by and between Cumberland Therapy Services, LLC, 3701 North Ravenswood, Suite 248, Chicago, IL 60613, hereinafter referred to as "Contractor" and Gadsden County School District, 35 Martin Luther King Jr. Boulevard, Quincy, FL 32351 hereinafter referred to as "School District" on May 20, 2014.

It is hereby agreed as follows:

FEES: Contractor agrees to provide the following services to School District and School District agrees to pay the following hourly rates for those Services:

School Psychologist **\$61.00 per hour**

School District agrees to be billed (except during holidays or school closures) for 8 hours per day of services for 213 school days during the 2014/15 School Year and Extended School Year, except during absence of Contractor's employee(s) due to illness or other personal time off. School District agrees and understands that School District is billed on actual hours of service provided by the Contractor's staff, based on the total hours listed on a bi-weekly timesheet and verified and authorized for invoicing by the signature of the specific individual authorized by School District to verify and sign Contractor's timesheets. Contractor's employee(s) will not work above 40 hours per week.

School District will not be billed during school closures and school holidays.

MILEAGE: Travel between schools will not be considered billable.

PAYMENT TERMS: School District will be billed every two weeks and agrees to pay all outstanding invoices within 30 days of receipt.

EMPLOYEE BENEFITS AND INSURANCES: Contractor will be responsible for providing all employee benefits and insurances including Workers' Compensation coverage.

CONFIDENTIALITY: School District agrees not to provide the content information of this Agreement to any individual or an entity that may be considered a competitor of the Contractor. School District further agrees not to discuss or disclose any information pertaining to the contents of this Agreement including but not limited to fees/costs, duration and terms, etc. to the Contractor's staff assigned to provide services to the School District. Disclosure of such information to the Contractor's staff will be considered a breach of this Agreement.

TERMINATION: This Agreement will end on the final day of the School District's 2014/15 Extended School Year and may continue beyond this period by mutual consent. School District agrees not to terminate the Agreement until the end of the term unless Contractor's staff is deficient in performance or involved in professional or ethical misconduct. School District agrees to notify Contractor of any deficiencies in services or possible ethical or professional conduct as soon as School District becomes aware of such deficiencies or conduct.



JURISDICTION: This agreement shall be governed by, construed, and is enforceable in accordance with the laws of the State of Illinois. Any action or proceeding relating to or arising out of this Agreement shall be commenced and heard in the State or Federal Court sitting in Chicago, Illinois. Both parties hereby consent to the jurisdiction and venue of such courts.

Signed for Contractor:

Signed for School District:

EM

Signature

Signature

Erin Corcoran

Name

Name

President

Title

Title

5/20/14

Date

Date

Signed for School District:

Signature

Name

Title

Date

Cumberland Therapy Services, LLC
3701 North Ravenswood, Suite 248
Chicago, IL 60613
Phone: (800) 337-5965

Gadsden County School District
35 Martin Luther King, Jr. Boulevard
Quincy, FL 32351
Phone: (850) 327-9651

Submitter

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 8h

Date of School Board Meeting: June 24, 2014

TITLE OF AGENDA ITEM: Contracted Services with Speech/Language Pathologist Joy Scharein & The Gadsden County School Board

DIVISION: EXCEPTIONAL STUDENT EDUCATION

YES This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM :
(Type and Double Space)

Contract services with Joy Scharein to provide Speech/Language services to students at Havana Elementary School and Havana Middle School on an average basis of (37.5) THIRTY-Seven and a half hours per week.

FUND SOURCE: **FEEP dollars**
AMOUNT: **\$50.00 per hour**
PREPARED BY: Sharon B. Thomas *SB*
POSITION: Director, Exceptional Student Education

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

2 Number of ORIGINAL SIGNATURES NEEDED by preparer.
SUPERINTENDENT'S SIGNATURE: page(s) numbered 4
CHAIRMAN'S SIGNATURE: page(s) numbered 4

**Be sure that the COMPTROLLER has signed the budget page.
This form is to be duplicated on light blue paper.**

summary.for
revised 0591

Proof read by: Margaret D Bronson

GADSDEN COUNTY SCHOOL DISTRICT
STUDENT SERVICES/EXCEPTIONAL EDUCATION
CONTRACT WITH INDEPENDENT CONTRACTOR
2014-2015 Fiscal Year

Contract made June 24, 2014, BETWEEN the School Board of Gadsden County, Florida, a corporation organized and existing under the laws of the State of Florida, with its principal place of business at 35 Martin Luther King, Jr. Blvd., City of Quincy, County of Gadsden, State of Florida, herein referred to as the Board, and Joy Scharein, Speech Pathologist of 10041 Neamathla Trail, City of TALLAHASSEE County of LEON, State of FLORIDA herein referred to as contractor.

- 1. The Board is in the business of providing educational and other services to the students enrolled in its institutions or programs, and in the conduct of such business, desires to have the following services, as a contractor, to be performed by contractor: Speech/Language Therapy.*
- 2. Contractor agrees to perform these services for the Board under the terms and conditions set forth in this contract.*

NATURE OF WORK

Contractor will provide speech/language therapy services on behalf of the Board with respect to all matters relating to or affecting the provision of speech/language therapy to the preschool and school age population as identified by the Board and are approved by the Director of Exceptional Student Education. The contractor will render such services according to her professional qualifications, which together with appropriate registration, licensure and/or permit, shall be maintained throughout the terms of this agreement. Contractor shall have sole control of the manner and means of performing this contract provided the same is implemented under the direction of the students Individual Education Plan. The contractor shall provide the following services: See Attachment A.

PLACE OF WORK

BOARD will provide adequate space and equipment for contractor to carry out objectives outlined in the individual education plan for speech/language therapy. It is understood that these services will be rendered in Gadsden County Schools. Services will be provided mainly at Havana Elementary School and Havana Middle School, City of Havana, County of Gadsden State of Florida, as designated by the Director of Exceptional Student Education.

TIME DEVOTED TO WORK

In the performance of the services, the services and the hours contractor is to work on any given day will be entirely within contractors control and the Board will rely upon contractor to put in such number of hours on a daily basis that is reasonably necessary to fulfill the spirit and purpose of this contract. However, the contractor will provide services for no less than fifteen (15) hours and no more than thirty-seven and a half (37.5) hours per school week. The contractor may provide up to twenty (20) additional hours per school year for additional activities as scheduled and approved by the Director of Exceptional Student Education.

PAYMENT

The Board will pay contractor for all work actually performed by contractor, on completion of the same, at the rate of \$50.00 per unit of service. Payment shall be made by the Board within thirty (30) days after a statement for professional services rendered is received. Such statements shall be presented monthly (along with Medicaid Billing; See Attachment A). The contractor will not be reimbursed for traveling.

DURATION AND TERMINATION

The parties hereto contemplate that this contract will run for (1) fiscal school year August 1, 2014 thru June 30, 2015. Any party wishing to terminate this contract prior to its expiration date shall provide the other party with sixty (60) days written notice.

STATUS OF CONTRACTOR

This contract calls for the performance of the services of the contractor as an independent contractor and contractor will not be considered an employee of the Board for any purpose.

PAYMENT OF TAXES AND ASSESSMENTS

This contractor assumes full responsibility for the payment of all assessments, payroll taxes, or contributions, whether state or federal, as to his/her services under this contract and as to all individuals employed by the contractor to perform services under this contract. Contractor shall furnish to the Board, upon the request of the Board, a certificate or other evidence of compliance with all state or federal laws concerning contributions, taxes, and payroll assessments. Contractor agrees to maintain, at contractors expense, workers compensation insurance, as required by law, to fully protect both contractor and any individual employed by contractor in providing services under this contract.

CONFIDENTIALITY

Inasmuch as contractor will acquire or have access to information which is highly confidential, it is expected that contractor will not disclose such information unless such disclosure is required by law or with the authorization by the Director of Exceptional Student Education.

SERVICES BY OTHERS

In the event that the contractor shall at any time be unable to provide the services under this contract, the contractor may employ and temporarily furnish as a substitute to perform such services, another duly qualified and licensed person. Contractor shall be responsible for compensation of individuals employed by her as substitutes.

MISCELLANEOUS

Contractor shall, through insurance and otherwise, hold harmless the Board, its officers, and employees from any claim of liability resulting from any actions or negligence of the contractor or her substitutes or employees, if any, relating to the care and treatment of students, the operation of motor vehicles, or other actions required to provide services pursuant to this contract.

AMENDMENTS

This agreement and any signed attachments make up the entire agreement between the parties. Said agreement can only be modified or amended in writing, signed by both parties. If any provision of this agreement is found or determined to be unenforceable, all other provisions shall remain enforceable.

In witness their hands and seals, the parties have executed this agreement on the dates hereinafter indicated.

Joy Scharein, Speech Pathologist

Date

*Sharon B. Thomas, Director
Exceptional Student Education*

Date

THE SCHOOL BOARD OF GADSDEN COUNTY, FLORIDA

BY: _____
Roger P. Milton, CHAIRMAN

Date

ATTEST: _____
Reginald C. James, SUPERINTENDENT

Date

Notice to Vendor/Contractor: By acceptance of a contract/order in excess of \$10,000 and involving Federal Funds, the Vendor/Contractor agrees to comply with Title 34, Section 80.36(i) Code of Federal Regulations. Termination for cause and for convenience by the grantee or sub-grantee including the manner by which it will be effected and the basis for settlement will be decided by the Gadsden County School Board.

ATTACHMENT A

SPEECH PATHOLOGIST SERVICES PROVIDED:

1. *Conduct evaluations and screenings for scheduled grades and referrals using tests accepted by Gadsden County Schools. Students are recommended for enrollment based on the criteria adopted by Gadsden County Schools.*
2. *Complete paperwork required for IEP, progress reports and data recording according to Gadsden County Schools requirements.*
3. *Attendance at staffings, Annual Reviews, Three-Year evaluation and Dismissal Meetings to explain testing results and plan of treatment/carry-over for each child.*
4. *Conduct hearing screenings by grade or referral.*
5. *Refer children to community resources if indicated (if he/she fails hearing screenings or voice screening).*
6. *Conduct speech and/or language therapy sessions, usually in groups of children with similar problems. Conduct individual or classroom based therapy as indicated.*
7. *Maintain log of student attendance for therapy and lesson plans for each group.*
8. *Maintain documentation and records according to county guidelines.*
9. *Develop communication boards and other alternative systems as needed by individual students. Consult with classroom teachers to demonstrate the use of these alternative communication systems.*
10. *Maintain appropriate logs and records and complete Medicaid Billing.*

Rubmita

GADSDEN SCHOOL BOARD
OFFICE OF ASSISTANT
SUPERINTENDENT

AGENDA ITEM NO. 8i

Date of School Board Meeting: JUNE 24, 2014

2014 JUN 17 PM 5: 37

TITLE OF AGENDA ITEM: The School Board of Gadsden County, Contract with Independent Contractor Janice M. Gilchrist

DIVISION: EXCEPTIONAL STUDENT EDUCATION

This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM:
(Type and Double Space)

The purpose of this contract is to provide additional counseling and clinical services to students with behavioral, emotional and/or academic problems in Gadsden County Schools. These services will be provided mainly at Stewart Street Elementary School and other schools/assignments as needed (as designated by the Director of Exceptional Student Education).

FUND SOURCE: IDEA dollars
AMOUNT: \$40.00 (per hour for actual hours worked)
PREPARED BY: Sharon B. Thomas *SBS*
POSITION: Director, Exceptional Student Education

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

2 Number of ORIGINAL SIGNATURES NEEDED by preparer.
SUPERINTENDENT'S SIGNATURE: page(s) numbered 3
CHAIRMAN'S SIGNATURE: page(s) numbered _____

Be sure that the COMPTROLLER has signed the budget page.

This form is to be duplicated on light blue paper.

summary for
revised 0591

Proof read by: Margaret D. Bronser

Gadsden County School District
Exceptional Student Education
Contract with Independent Contractor
2014-2015 Fiscal Year

THIS CLINICAL SERVICES MASTER AGREEMENT ("Contract") is entered into as of this 9th day of June, 2014 by and between The Gadsden County School Board, a Florida corporation organized and existing under the law of the State of Florida, with its principal place of business at 35 Martin Luther King Jr. Blvd., City of Quincy, County of Gadsden, State of Florida, herein referred to as the Board, and Janice M. Gilchrist of Midway, County of Gadsden, State of Florida herein referred to as contractor.

1. The Board is in the business of providing educational and other services to the students enrolled in its institutions or programs, and in the conduct of such business, desires to have the following services, as a contractor, to be performed by Janice M. Gilchrist: Clinical Psychological Services.
2. Janice M. Gilchrist agrees to perform services for the Board under the terms and conditions set forth in this contract and in this listed manner.

RESPONSIBILITY OF CONTRACTOR

The contractor will provide clinical psychological services on behalf of the Board with respect to all matters relating to or affecting the provision of clinical psychology to the preschool and school age population as identified by the Board and for who such services are prescribed for by a duly licensed or licensed eligible psychologist in the State of Florida. And that are approved by the Director of Exceptional Student Education. The contractor will render such service according to her professional qualifications, and shall be maintained throughout the terms of this agreement. Janice M. Gilchrist shall provide the following services: **A.** Counseling **B.** Class wide behavioral plans **C.** Individual behavioral modification plans **D.** Consultation for clinical and/or behavioral modification plans **E.** Clinical observations for Response to Intervention **F.** Target group sessions **G.** Collaboration with student Study Team **H.** Participation with the Multi-tiered Systems of Support /Response to Intervention/Problem-Solving teams to suggest and/or provide interventions to students. You are paying me only for those services listed above and no others. It is unlawful for me to make any guarantee or promise to you unless it is written in this contract and unless I have a factual basis for making the guarantee or promise.

STATUS OF THE CONTRACTOR

These services shall be provided by the contractor as an independent agent free from obligation of employment terms not thereupon agreed in the contract.

DESIGNATED WORK AREA

The School Board will provide adequate space and materials and time for the contractor to carry out treatment goals and objectives outlined in the individual education plan and treatment plan for clinical psychological services. It is understood that these services will be rendered in Gadsden County Schools, State of Florida, or other locations approved by the Director of Exceptional Student Education.

TIME ALLOTMENT FOR AGREED DUTIES

The Contractor will provide services for 5 days per school week (7.5 hours per day). As approved by the Director of Exceptional Student Education, the contractor may provide up to an additional (5) hours per school week for activities such as home visits, emergency assessments, crisis management training. The allotted workflow shall also incorporate administrative duties required for accurate reporting of contracted services.

PAYMENT ARRANGMENT

The School Board will pay Janice M. Gilchrist for all work performed by contractor, on completion of the same, at the rate of \$40.00 per unit of services (\$40.00 per hour). I will provide you a statement itemizing all services rendered and the balance owed, each time a payment is due.

Payment shall be made by the Board within (30) calendar days after statements for professional services are received. Such statements shall be presented monthly.

PAYMENT OF TAXES AND ASSESSMENTS

This contractor assumes full responsibility for the payment of all assessments, payroll taxes, or contributions, whether state or federal, as to her services under this contract and as to all individuals employed by the contractor to perform services under this contract. Janice M. Gilchrist shall furnish to the Board, upon request of the Board, a certificate or other evidence of compliance with all state or federal laws concerning contribution, taxes, and payroll assessments.

The contractor agrees to maintain, at contractor's expense, workers compensation insurance, as required by law, to fully protect contractor and any individual employed by contractor in providing services under this contract. All other assumptions are thereupon understood to be in the care and authority of the Board.

CONFIDENTIALITY

Inasmuch as the contractor will acquire or have access to information which is highly confidential, it is expected that contractor will not disclose such information unless such disclosure is required by law by the ethical guidelines/statutes of the Florida Board of Licensed Psychologist and with approval of the Director of Exceptional Student Education.

DURATION AND TERMINATION

The parties hereto contemplate that this contract will run for one (1) fiscal school year from August 20, 2014 to May 31, 2015. Any party wishing to terminate this contract prior to its expiration date shall provide that other party with sixty day (60) written notice.

AMENDMENTS

This agreement and any signed attachment make up the entire agreement between the parties. Said agreement can only be modified or amended in writing, signed by both parties. If any provision of this agreement is found or determined to be unenforceable, all other provisions shall remain enforceable.

In witness of their hands and seals, the parties have executed this agreement on the dates hereinafter indicated.

Janice M. Gilchrist

Date

**Sharon B. Thomas, Director
Exceptional Student Education**

Date

THE SCHOOL BOARD OF GADSDEN COUNTY, FLORIDA

BY: _____

ATTEST: _____
Reginald C. James Superintendent

Date

Notice to Vendor/Contractor: By acceptance of a contract/order in excess of \$10,000 and involving Federal Funds, the Vendor/Contractor agrees to comply with title 34, Section 80.36(i) code of Federal Regulation. Termination for cause and for convenience by the grantee of sub-grantee including the manner by which it will be effected and the basis for the settlement will be decided by the Gadsden County School Board.

R. Smith

GADSDEN SCHOOL BOARD
OFFICE OF ASSISTANT
SUPERINTENDENT

2014 JUN 17 PM 5:37

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 8j

Date of School Board Meeting: JUNE 24, 2014

TITLE OF AGENDA ITEM: Agreement between the Gadsden County Public Schools and Milestones Occupational Therapy Services, LLC; Makesha Bush, OTR/L

DIVISION: EXCEPTIONAL STUDENT EDUCATION

YES This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM:
(Type and Double Space)

This contract will provide Occupational Therapy Services to Exceptional Students in Gadsden County Schools. This therapist will provide needed services in positions not filled by the Gadsden County School Board.

FUND SOURCE: FEFP Dollars

AMOUNT: \$58.00 (per hour for actual hours worked)

PREPARED BY: Sharon B. Thomas *SBT*
POSITION: Director, Exceptional Student Education

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

2 Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered 4

CHAIRMAN'S SIGNATURE: page(s) numbered _____

Be sure that the COMPTROLLER has signed the budget page.
This form is to be uplicated on light blue paper.

summary.for
revised 0591

Proof read by: Margaret D Burson

COOPERATIVE AGREEMENT FOR OCCUPATIONAL THERAPY SERVICES

Subject: Cooperative agreement for Occupational Therapy Services

1. Scope of Services

Between: Gadsden County School Board, Quincy, FL hereinafter referred to as "Agency" and, Milestones Occupational Therapy Services, LLC; Makesha Bush, OTR/L, P.O. Box 513 Gretna, FL 32332 hereinafter referred to as "Contractor".

- The Agency is in the business of providing childhood services to children with special needs enrolled in its program, and in the conduct of such business, desires to have the following services, as a contractor, to be performed by contractor for occupational therapy services.
- Contractor agrees to perform these services for the Agency under the terms and conditions set forth in this contract.

2. Duration and Termination

The parties hereto contemplate that this contract will begin August 18, 2014 and continue through May 29, 2015. Any party wishing to terminate this contract prior to its expiration date shall provide the other party with thirty days written notice. Said notice shall be delivered by certified mail or in person.

3. Authorized Parties

The School Board Chairman and Sharon Thomas ESE director are designated representatives authorized to represent the Agency. Milestones Occupational Therapy Services LLC, Makesha Bush is the designated Contractor.

4. Nature of Work

Contractor shall provide occupational therapy services with respect to all matters relating or affecting the provision of occupational therapy to the Agency. Contractor shall render services according to their professional qualifications, which together with appropriate registration, licensure and/or permit, shall be maintained throughout the terms of this agreement.

The contractor will:

- Supply testing materials needed, and will provide evaluative, direct & consultative Occupational Therapy services consistent with goals in students' education/support plan
- Attend IEP meetings; if unable to attend IEP meetings, provide required information to Agency prior to meeting
- Maintain documentation of services per funding source requirements/guidelines

4. Nature of Work (continued)

The Agency will:

- Provide appropriate workspace for diagnostic, intervention, and consultation services and access to copy machine, fax machine, and telephone
- Provide supplies as needed for contractor to carry out objectives outlined in the individual education plan for occupational therapy
- Provide contractor with a schedule of IEP meetings, parent conferences, and family support meetings to provide adequate time for contractor to prepare for meetings

6. Status of Contractor

This contract calls for the performance of the services of the contractor as an independent contractor and contractor will not be considered an employee of the Agency for any purpose.

7. Place of Work

It is understood that these services will be rendered at schools within the Gadsden County Public School System.

8. Time Devoted to Work

In the performance of the services, the services and the hours the Contractor is to work on any given day will be entirely within Contractor's control, and the Agency will rely upon Contractor to put in such number of hours on a daily basis that is reasonably necessary to fulfill the spirit and purpose of this contract. Contractor will provide services for 7.5 hours per school day; 4 days/week. It is understood that the contractor is free to contract similar services for other agencies, while under contract, provided that such services do not negatively interfere with contract and provision of services between the Agency and contractor.

9. Payment

The Agency will pay contractor for all work actually performed by Contractor, on completion of the same, a daily rate of \$435/day (\$58.00 x 7.5 hrs/day). Contractor agrees to submit properly prepared invoices on a bi-weekly basis. The Board shall process invoices and make payments on a bi-weekly basis.

10. Insurance Liability

Contractor agrees to maintain, at contractor's expense, professional liability insurance. Contractor agrees to provide proof of current State of Florida licensure, proof of Professional Liability Insurance, & proof of required health & background screenings as requested.

11. Confidentiality

Inasmuch as contractor will acquire or have access to information that is highly confidential, contractor will not disclose such information unless disclosure is required by law or with authorization of the Agency. Records will not be removed from the school through which services are being provided.

12. Miscellaneous

Contractor shall, through insurance and otherwise, hold harmless the Agency, its officers, and employees from any claim of liability resulting from any actions or negligence of the contractor, if any, relating to the care and treatment of students or other actions required to provide services pursuant to this contract.

13. Non Compete Clause

The contractor understands and agrees that all clients served under this agreement will remain clients of the agency upon termination of this agreement.

14. Waiver of Breach

No waiver or any breach by any party of terms of this Agreement shall be deemed a waiver of any subsequent breach.

15. Governing Law

Florida Law shall govern this instrument in reference to interpretation and performance.

16. Communications

Any official communication between parties will be sent by certified mail to the following addresses:

For the Agency:

Sharon Thomas, Director of
Martin Luther King Blvd
Quincy, FL 32351

For the Contractor:

Milestones Occupational Therapy Services, LLC
Makesha Bush, Occupational Therapist
P.O. Box 513
Gretna, FL 32332

17. Amendments

This agreement makes up the entire agreement between the parties. The said agreement can only be modified or amended in writing, signed by both parties. If any provision of this agreement is found or determined to be enforceable, all other provisions shall remain enforceable.

18. Representations

The parties represent to each other:

- (a) Each party fully understands the provisions of this agreement and each is signing this Agreement freely and voluntarily intending to be bound by item terms.
- (b) Each party understands and agrees that this agreement constitutes the contract of the parties. There are not warranties or other than those set forth herein.

IN WITNESS WHEREOF, the parties have caused this agreement to be duly executed on the dates hereinafter indicated.

Milestones Occupational Therapy Services, LLC
Makesha Bush, OTR/L Occupational Therapist
Independent Contractor

Date

GADSDEN COUNTY SCHOOL BOARD

Director of ESE

Date

Chairperson

Date

Superintendent

Date

R. Smith
GADSDEN SCHOOL BOARD
OFFICE OF ASSISTANT
SUPERINTENDENT
2014 JUN 17 PM 5:37

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 8k

Date of School Board Meeting: JUNE 24, 2014

TITLE OF AGENDA ITEM: COOPERATIVE AGREEMENT FOR INTER-COUNTY TRANSFER OF EXCEPTIONAL STUDENTS BETWEEN LEON COUNTY SCHOOL BOARD AND GADSDEN COUNTY SCHOOL BOARD

DIVISION: EXCEPTIONAL STUDENT EDUCATION

YES This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM:
(Type and Double Space)

This is an Annual Review of Contractual Agreement for Inter-County Transfer of Exceptional Students by the School Board of Leon County and the School Board of Gadsden County. The School Board of Leon County provides and operates special programs for properly identified special education students from Gadsden County. The special program contract is for Hearing Impaired, and other students specifically identified by individual contract. Students are placed at the following school sites: W.T. Moore Elementary School, Swift Creek Middle School, Lincoln High School, and Gretchen Everhart Special Day School.

FUND SOURCE: STATE FTE FUNDS

AMOUNT: (determined by formula)
PREPARED BY: Sharon B. Thomas *SBT*
POSITION: Director, Exceptional Student Education

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

- 4 Number of ORIGINAL SIGNATURES NEEDED by preparer. (2 AGREEMENTS: 1 for an individual student Requires 2 signatures of Superintendent
1 for Inner County transfer of Students
Requires 2 signatures of Board's Chairman)

SUPERINTENDENT'S SIGNATURE: page(s) numbered 2
CHAIRMAN'S SIGNATURE: page(s) numbered 4

Be sure that the COMPTROLLER has signed the budget page.
This form is to be duplicated on light blue paper.

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revised 0591

Proof read by: *Margaret D Brown*

BOARD CHAIR
Forrest Van Camp

BOARD VICE CHAIR
Maggie B. Lewis-Butler



BOARD MEMBERS
Georgia "Joy" Bowen
Dee Crumpler
DeeDee Rasmussen

SUPERINTENDENT
Jackie Pons

**CONTRACTUAL AGREEMENT
FOR INTER-COUNTY
TRANSFER OF EXCEPTIONAL STUDENTS**

This agreement entered into the eighteenth day of August, 2014, by the School Board of Leon County and the School Board of Gadsden County is for the purpose of defining the responsibilities of each as it relates to exceptional students who reside in one county and attend schools in the other, and delineating the conditions under which the contract shall be executed.

I. The School Board of Leon County agrees to make available exceptional student education services in certain exceptional education programs and assignments within certain grade levels at specific sites in the district. Those programs, assignments, grade levels and sites are as follows:

<u>PROGRAM</u>	<u>ASSIGNMENT</u>	<u>GRADE LEVEL</u>	<u>SITE</u>
Hearing Impaired	Special Day School	PK-12	Everhart
	Resource/Special Class	PK-5	Moore
	Resource Class	6-8	Swift Creek
	Resource/Special Class	9-12	Lincoln

The School Board of Gadsden County and the parents will develop an individual educational plan (IEP) for exceptional students in conjunction with the School Board of Leon County. As determined by the IEP, those exceptional students in need of programs, assignments, grade levels and at sites included herein may be served by the School Board of Leon County. Only if programs, facilities and personnel are available will students be considered.

2757 West Pensacola Street • Tallahassee, Florida 32304-2998 • Phone (850) 487-7110 • Fax (850) 414-5194 •

2757 West Pensacola Street • Tallahassee, Florida 32304-2998 • Phone (850) 487-7110 • Fax (850) 414-5194 •

www.leonschools.net

"The Leon County School District does not discriminate against any person on the basis of gender, marital status, sexual orientation, race, religion, national origin, age, color or disability."

Building the Future Together

II. In providing these Special Education Programs, the School Board of Leon County shall be responsible for:

- A. Provision and maintenance of adequate and appropriate facilities to house the program(s);
- B. Provision of sufficient certified instructional and qualified non-instructional personnel, necessary for a quality program, including teacher, therapists, and a supervisor or coordinator;
- C. Notifying and obtaining the agreement of the participating district in any decision regarding the assignment of instructional staff in excess of the approved staffing ratio of the School Board of Leon County in order to provide appropriate instruction for a student from the participating district;
- D. Provision of necessary equipment, materials and supplies for each student;
- E. Provision of all other direct and indirect services necessary to conduct a quality program, except those responsibilities specifically designated in this agreement as the responsibility of the participating county;
- F. Provision of dismissal or reevaluation information for students from the School Board of **Gadsden County**.

III. As a participating school district, the School Board of **Gadsden County** shall be responsible for:

- A. Provision of transportation for those students from its county who are enrolled in the program. The transportation schedule shall enable students to participate in the total program for at least the minimum number of hours required for the age or grade group;
- B. Provision of the evaluation information and eligibility process conducted in accordance with Florida State Board of Education Administrative Rules 6A-6.0331, FAC, 6A-6.03011, FAC and 6A-6.03013, FAC;
- C. Provision of the assignment and dismissal process in accordance with 6A-6.03028, FAC, 6A-6.0311, FAC and 6A-6.0331, FAC;
- D. Initiating and conducting an Individual Education Plan meeting in accordance with 6A-6.0331, FAC and in conjunction with the School Board of Leon County;
- E. Legal costs incurred through the due process procedure as a result of a student's assignment;
- F. The salary of personnel required to instruct students from the participating district in excess of the approved staffing ratio of the School Board of Leon County;
- G. Adhering to the school calendar and hours designated by the School Board of Leon County.

IV. Funding for exceptional student programs shall follow the procedure specified within this section:

A. The School Board of Leon County shall:

1. Provide the 2014-2015 formula calculation for the Regional Funding Fee;
2. Provide an invoice after the February FTE period to June 1 based on a formula using discretionary tax dollars in the general fund (FEFP calculation) projected total weighted FTE for contracted students multiplied by the Regional Funding Fee; and the salary of any teacher, classroom aide, interpreter or classroom support personnel required for individualized instruction as a result of the behavior and/or communication needs of a **Gadsden County** student;
3. Submit or receive funds as an adjustment to the "Regional Funding Fee" following the June FTE and end-of-year close out. That is, provided the actual end of year formula factors creates an under or over payment of \$100 or more for the current fiscal year.

B. The School Board of **Gadsden County** shall:

1. Receive all FTE funds generated from Transportation of their students to Leon County;
2. Submit payment to the School Board of Leon County based on the statement of account described under IV A of this section. This payment shall arrive no later than June 30, 2015;
3. Submit or receive funds as an adjustment to the Regional Funding Fee payment projections and actual salary reimbursement for any teacher, classroom aide, interpreter or classroom support personnel required for instruction as a result of the behavior and/or communication needs of a **Gadsden County** student, if actual weighted FTE creates an under or over payment of \$100 or more. This adjustment will be made following the June FTE and prior to October 1, 2015.

This Agreement shall take effect August 18, 2014 and continue until May 29, 2015. This contract supersedes any previous agreements. The School Board of Leon County and the School Board of Gadsden County shall abide by Section 1001.42(4)(d)(3.), Florida Statutes, for Settlement of Disagreements, which states "In the event an agreement cannot be reached relating to any phase of the project or activity, the matter may be referred jointly by the cooperating school boards, or by any individual school board of the cooperating districts, to the Department of Education for decision under regulations of the state board, and its decision shall be binding on all school boards of the cooperating districts".

The agreement executed the day and year first written above.

Extended School Year Services (ESY)

V. Services for Extended School Year (ESY) will be contracted on an individual basis.

- A. The School Board of Leon County agrees to make available extended school year exceptional student education services in certain exceptional education programs and assignments within certain grade levels at specific sites in the district. Extended school year programs are provided four days per week, Monday through Thursday and follow the adopted Leon County School Board Calendar. All provisions agreed upon in the yearly contractual agreement are extended for extended school year services, i.e., among other things, **Gadsden County** will be required to pay for all costs associated with the employment of one-on-one aides during ESY.
- B. Funding: extended school year services will be provided by Leon County for **Gadsden County** students for a cost of five hundred dollars per student for the five weeks of Extended School Year.

THE SCHOOL BOARD OF GADSDEN COUNTY, FLORIDA

BY: _____ DATE: _____
Board Chairperson

THE SCHOOL BOARD OF LEON COUNTY, FLORIDA

BY: _____ DATE: _____
Board Chairperson

DATE: _____

Jackie Pons
Superintendent, Leon County Schools

Submit

GADSDEN SCHOOL BOARD
OFFICE OF ASSISTANT
SUPERINTENDENT

2014 JUN 17 PM 5:37

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 81

Date of School Board Meeting: JUNE 24, 2014

TITLE OF AGENDA ITEM: Agreement between The School Board of Gadsden County Public Schools and INVO HealthCare Associates, Inc.

DIVISION: EXCEPTIONAL STUDENT EDUCATION

YES This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM:
(Type and Double Space)

This contract will provide Occupational Therapy, Physical Therapy and Speech/Language Services to Exceptional Students in Gadsden Schools. These therapists will provide needed services in positions not filled by the Gadsden County School Board.

FUND SOURCE: FEFP Dollars

AMOUNT: \$58.00 (per hour for actual hours worked)

PREPARED BY: Sharon B. Thomas *SBT*
POSITION: Director, Exceptional Student Education

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

2 Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered 4 & 5

CHAIRMAN'S SIGNATURE: page(s) numbered _____

Be sure that the COMPTROLLER has signed the budget page.
This form is to be duplicated on light blue paper.

summary.for
revised 0591

Proof read by: Margaret D Bruner

Agreement

THIS AGREEMENT is made on this 23rd day of May, 2014 (the "*Effective Date*") by and between *Invo HealthCare Associates*, 1780 Kendarbren Drive, Jamison, PA 18929 (hereinafter referred to as "*IHC*") and **Gadsden County Public Schools, 35 Martin Luther King Jr. Blvd., Quincy, FL 32351** (hereinafter referred to as "*Agency*").

THIS AGREEMENT contains the following:

- (A) Agency services individuals requiring specialized related services.
- (B) Both parties wish to enter into an AGREEMENT in which *IHC* will contract with occupational therapist(s), physical therapist(s) and speech and language pathologist(s) (hereinafter referred to as "**Service Provider(s)**"), who will provide therapy services to the individuals of the Agency.

THE PARTIES agree to the following:

1. Services:

Both parties agree that the scope of *IHC*'s responsibility, as set forth in the AGREEMENT, is limited to contracting with service provider(s) who will provide the following services for the clients of the Agency located in the state of Florida:

- (a) Occupational Therapy: approximately thirty-seven and a half (37.5) hours per week
- (b) Physical Therapy: approximately thirty-seven and a half (37.5) hours per week
- (c) Speech and Language Pathology: approximately thirty-seven and a half (37.5) hours per week

2. Duties of Service Provider(s):

(a) The services provided by the service provider(s) under this AGREEMENT will be consistent with the available facilities, the service provider(s)'s professional judgment and the standards established in the Agency's community.

(b) The service provider(s) shall maintain adequate and current records, in the manner required by the Agency, for individuals who are provided with service.

(c) The service provider(s) will furnish a professional liability insurance policy to cover herself/himself. This policy must be effective on or before the service provider(s)'s first day of work.

(d) The Agency understands and agrees that **IHC** and the service provider(s) are acting and performing as independent contractors at all times. The professional duties of the service provider(s) will be directed by the Agency. The Agency and the service provider(s) must fully comply with all applicable provisions of law and other rules and regulations of any and all governmental authorities relating to licensure and the regulation of the service provider(s) and the Agency.

(e) The service provider(s), under their contract, must comply with policies, rules, and regulations of the Agency.

3. Term:

This AGREEMENT shall be for an eleven (11) month term beginning on or about August 1, 2014 and extending until June 30, 2015. The AGREEMENT will continue for an additional one (1) year term unless either party gives written notice of cancellation sixty (60) days prior to the next one year term. However, if **IHC** does not present a qualified candidate for interview within thirty (30) days from the date on which this AGREEMENT is signed, then the Agency will have the option to terminate the AGREEMENT. Notice of termination will be delivered to **IHC** by Certified Mail with a return receipt.

4. Fees:

(a) **IHC** shall be compensated for services rendered.

(b) Since **IHC** incurs daily expenses, **IHC** will receive from the Agency a guaranteed income approved by the Agency of:

(b.1) fifty-eight (\$58.00) dollars per hour for every hour of contracted occupational therapist services.

(b.2) fifty-eight (\$58.00) dollars per hour for every hour of contracted physical therapist services.

(b.3) fifty-eight (\$58.00) dollars per hour for every hour of contracted speech and language pathologist services.

In the event that service provider(s) must travel between locations after arriving for work on a given date, billable hours will include transportation time from one location to another.

The Agency shall make payment within thirty (30) days of receipt of a properly prepared and submitted invoice. If the payment is not postmarked from the Agency within thirty (30) days of the receipt of the invoice, the Agency agrees to pay an additional 1.5% interest per month on amounts not paid, such interest being calculated beginning day thirty-one (31) from receipt of invoice. Interest should be calculated in accordance with standard accounting procedures. **IHC** shall bill the Agency for the interest.

Failure by the Agency to pay appropriately submitted invoice within sixty (60) days of receipt may be considered a breach of contract.

For each subsequent contract renewal, the compensation for service provider(s)'s services will be negotiated approximately one month prior to the initiation of the next contract period.

5. Duties of Agency:

(a) The Agency will provide the service provider(s) with adequate work areas and equipment, as deemed necessary by the Agency, for the service provider(s) to perform her/his job.

(b) Agency will provide support services as needed.

6. Service of Notices:

Notices served on the Agency will be served by Certified Mail with a return receipt, to the **Gadsden County Public Schools, 35 Martin Luther King Jr. Blvd., Quincy, FL 32351**. Notices served on *IHC* will be served by Certified Mail with a return receipt, to *Invo HealthCare Associates*, 1780 Kendarbren Drive, Jamison, PA 18929.

7. Law of State to Govern:

The validity, enforceability and interpretation of any of the clauses of this AGREEMENT will be determined and governed by the substantive and procedural laws of the commonwealth of Pennsylvania.

8. Scope of AGREEMENT:

This AGREEMENT constitutes the final, complete and entire contract between the parties and supersedes all prior and contemporaneous agreements, understandings, negotiations and discussions of the parties, whether written or oral. There are no representations or other agreements included. No supplemental modification or waiver of this AGREEMENT will be binding unless executed in writing by the parties to be bound thereby.

9. Amendments:

This AGREEMENT may be amended at any time by mutual agreement of the parties. However, before any amendment will be operative or valid, it must be reduced to writing and signed by both the Agency and *IHC*.

10. Non-Interference, Non-Solicitation, and Restrictive Covenant:

Agency agrees that it may not during the term of this Agreement and for two (2) years after the expiration or termination of this agreement, directly or indirectly, either as agent, partner, owner,

investor, adviser or consultant or in any other capacity, employ or otherwise contract for services with the following:

(a) any service provider(s) that any **IHC**'s staff introduces to Agency, arranges for interview with Agency, or who has provided Services to Agency by or through **IHC**;

(b) any business entity (*i.e.* corporation, company partnership, association) that wishes to use any of **IHC** staff that has been introduced to Agency, had an arranged interview with Agency, or who has provided Services to Agency by or through **IHC**; and/or

(c) any current or former service provider(s) of **IHC** who has provided Services to Agency under the terms of this Agreement and who is associated with an independent business entity as an employee, officer, agent, partner, owner, investor, lender, director, adviser or consultant or in any other capacity.

11. Default:

The Agency will be in default if any of the following happens:

(a) The Agency fails to make any payment when due.

(b) The Agency breaks a promise it has made to **IHC**, or the Agency fails to perform promptly at the time and in the specified manner provided in this contract.

(c) The Agency makes any representation or statement to **IHC** that is false or misleading in any material respect.

12. Confidential Information:

Both parties agree they will not at any time during or after termination of this AGREEMENT use or disclose any confidential information or methods to any person or entity for any purpose whatsoever without the prior written consent of the Agency and **IHC**.

13. Termination:

This AGREEMENT may be terminated (i) immediately upon written notice of breach of any party by the other party, or (ii) by either party upon sixty (60) days prior written notice. Notice will be delivered to the other party by Certified Mail with a return receipt.

The validity or unenforceability of any particular provision or part of this AGREEMENT will not affect any other provisions. If any provision of this contract is held to any extent invalid by any competent tribunal, that provision will be modified to make it enforceable.

THE PARTIES execute this AGREEMENT on the _____ day of _____, 2014.

Gadsden County Public Schools

By: _____

Title: _____

Invo HealthCare Associates

By: _____

Mary A.J. McClain, CEO

SUMMARY SHEET

2014 JUN 17 PM 5:37

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 8m

DATE OF SCHOOL BOARD MEETING: JUNE 24, 2014

TITLE OF AGENDA ITEM: **AGREEMENT BETWEEN THE SCHOOL BOARD OF GADSDEN COUNTY AND THE SCHOOL BOARD OF SEMINOLE COUNTY (MEDICAID ADMINISTRATIVE CLAIMING)**

DIVISION: EXCEPTIONAL STUDENT EDUCATION

YES This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM:
(Type and Double Space)

This is an agreement with SCSB (Seminole County School Board) – a consortium that acts as data manager/processor for Medicaid billing.

FUND SOURCE: **MEDICAID**

AMOUNT: **\$9.00 PER RANDOM SAMPLING FORM**

PREPARED BY: Sharon B. Thomas *SBT*
POSITION: Director of Exceptional Student Education

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

2 Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered 7

CHAIRMAN'S SIGNATURE: page(s) numbered 7

SCHOOL BOARD ATTORNEY: page(s) numbered 7

This form is to be duplicated on light blue paper.

PROOF READ BY: Margaret D Bronson

AGREEMENT

THIS AGREEMENT is made and entered into as of this 1st day of July, 2014, by and between

THE SCHOOL BOARD OF GADSDEN COUNTY, FLORIDA

(hereinafter referred to as SBGC),

a body corporate and political subdivision of the State of Florida,

whose principal place of business is

35 MLK Jr. Boulevard, Quincy, Florida 32351.

and

THE SCHOOL BOARD OF SEMINOLE COUNTY, FLORIDA

(hereinafter referred to as SBSC),

whose principal place of business is

400 East Lake Mary Boulevard, Sanford, Florida, 32773.

WHEREAS, both School Boards have a common and concurrent interest in providing data and sharing statistics for the purpose of being reimbursed for Medicaid Administrative Claiming activities.

NOW, THEREFORE, in consideration of the premises and of the mutual covenants contained herein and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the Parties hereby agree to establish and maintain a process to determine statistically valid time sample results with approved staff as a function of the Medicaid Administrative Claiming reimbursement process. Both School Boards shall be subject to the following terms:

ARTICLE 1 - RECITALS

1.01 **Recitals**. The Parties agree that the foregoing recitals are true and correct and that such recitals are incorporated herein by reference.

ARTICLE 2 – SPECIAL CONDITIONS

2.01 **Term of Agreement**. The term of this Agreement shall commence on July 1, 2014 and conclude on June 30, 2015, unless terminated as provided herein.

2.02 **Responsibilities of SBGC.**

- 2.02.1 Provide a pool of employee names who are eligible to be sampled based upon selected job codes whose incumbents have the potential to engage in Administrative Claiming Activities. Only certain staff positions are to be included in the time study process upon mutual concurrence among all parties participating in this agreement and upon the review and approval of AHCA.
- 2.02.2 Distribute and collect random moment sample forms, as provided by SBSC during four fiscal quarters in the school year.
- 2.02.3 Code the status of each observation form to effectively and accurately record the performance of school district personnel activities as delineated in the Medicaid School District Administrative Claiming Guide.
- 2.02.4 Provide periodic training to SBGC employees who will be responsible for coding the quarterly activities of district personnel delineated on the sample forms. Only trained district coders will be authorized to participate in the program.
- 2.02.5 Send quarterly sample forms to SBSC for activity calculations
- 2.02.6 Pay the SBSC prorated actual and reasonable costs among all districts participating based upon the percent of ESE FTE appropriated during the 2010-2011 school year. Your charge for the 2014-2015 fiscal year will be \$ 442.30 which will include the cost of office operations and the cost for clerical and administrative processing, consultation and technical assistance during the contract period. The above reference amount may be payable in equal quarterly installments or in one annual payment. This cost will be reviewed annually.
- 2.02.7 SBGC shall maintain and be able to produce requested records and materials for Agency for Health Care Administration audits.
- 2.02.8 Any recoupment of funds due to an audit exception, deferral or denial deemed appropriate by the Agency for Health Care Administration (AHCA) will be the responsibility of the SBGC, even after withdrawal from the program.

2.03 **Responsibilities of SBSC**

- 2.03.1 Pursuant to this agreement, SBSC will be acting solely as a data manager and data processor for SBGC.
- 2.03.2 Annually collect school district calendars and scheduled work hours from SBGC.
- 2.03.3 Quarterly collect personnel rosters from SBGC and perform data entry relative to creating a sample pool of individuals.
- 2.03.4 Quarterly generate, package and mail the prorated share of random moment sample forms to SBGC.

2.03.5 Quarterly review all returned sample forms for completion. One hundred percent of all forms will be reviewed for the purposes of quality control. In instances where there is a disagreement on the coding of a particular sample form by the district coder, AHCA will be contacted to ensure the consistency of activity selection.

2.03.6 Quarterly calculate all the data generated from scanning and return the statistics to all participating districts for individual claim generation.

2.04 Mutual Agreements

Independent contractors: SBSC and SBGC are independent contractors. Nothing contained herein shall constitute or designate either party's employees or agents as agents or employees of the other party. Each party remains solely responsible for its own cost report and claim that will be submitted to the Agency for Health Care Administration (AHCA).

2.05 Indemnification. Each party agrees to be fully responsible for its acts of negligence, or its agent's acts of negligence when acting within the scope of their employment and agrees to be liable for any damages resulting from said negligence.

ARTICLE 3 – GENERAL CONDITIONS

3.01 No Waiver of Sovereign Immunity. Nothing contained in this Agreement is intended to serve as a waiver of sovereign immunity by any agency to which sovereign immunity may be applicable.

3.02 No Third Party Beneficiaries. The parties expressly acknowledge that it is not their intent to create or confer any rights or obligations in or upon any third person or entity under this Agreement. None of the parties intend to directly or substantially benefit a third party by this Agreement. The parties agree that there are no third party beneficiaries to this Agreement and that no third party shall be entitled to assert a claim against any of the parties based upon this Agreement. Nothing herein shall be construed as consent by an agency or political subdivision of the State of Florida to be sued by third parties in any matter arising out of any contract.

3.03 Non-Discrimination. The parties shall not discriminate against any employee or participant in the performance of the duties, responsibilities and obligations under this Agreement because of race, age, religion, color, gender, national origin, marital status, or disability.

3.04 Termination. This Agreement may be canceled with or without cause by SBGC during the term hereof one-quarter's prior written notice to the other parties of its desire to terminate this Agreement.

3.05 **Records.** Each party shall maintain its own respective records and documents associated with this Agreement in accordance with the records retention requirements applicable to public records. Each party shall be responsible for compliance with any public documents request served upon it pursuant to Section 119.07, Florida Statutes, and any resultant award of attorney's fees for non-compliance with that law.

3.06 **Entire Agreement.** This document incorporates and includes all prior negotiations, correspondence, conversations, agreements and understandings applicable to the matters contained herein and the parties agree that there are no commitments, agreements or understandings concerning the subject matter of this Agreement that are not contained in this document. Accordingly, the parties agree that no deviation from the terms hereof shall be predicated upon any prior representations or agreements, whether oral or written.

3.07 **Amendments.** No modification, amendment, or alteration in the terms or conditions contained herein shall be effective unless contained in a written document prepared with the same or similar formality as this Agreement and executed by each party hereto.

3.08 **Preparation of Agreement.** The parties acknowledge that they have sought and obtained whatever competent advice and counsel as was necessary for them to form a full and complete understanding of all rights and obligations herein and that the preparation of this Agreement has been their joint effort. The language agreed to herein expresses their mutual intent and the resulting document shall not, solely as a matter of judicial construction, be construed more severely against one of the parties than the other.

3.09 **Waiver.** The parties agree that each requirement, duty and obligation set forth herein is substantial and important to the formation of this Agreement and, therefore, is a material term hereof. Any party's failure to enforce any provision of this Agreement shall not be deemed a waiver of such provision or modification of this Agreement. A waiver of any breach of a provision of this Agreement shall not be deemed a waiver of any subsequent breach and shall not be construed to be a modification of the terms of this Agreement.

3.10 **Compliance with Laws.** Each party shall comply with all applicable federal and state laws, codes, rules and regulations in performing its duties, responsibilities and obligations pursuant to this Agreement.

3.11 **Governing Law.** This Agreement shall be interpreted and construed in accordance with and governed by the laws of the State of Florida. Any controversies or legal problems arising out of this Agreement and any action involving the enforcement or interpretation of any rights hereunder shall be submitted to the jurisdiction of the State courts of the Second Judicial Circuit of Gadsden County, Florida.

3.12 **Binding Effect.** This Agreement shall be binding upon and inure to the benefit of the parties hereto and their respective successors and assigns.

3.13 **Assignment.** Neither this Agreement nor any interest herein may be assigned, transferred or encumbered by any party without the prior written consent of the other party. There shall be no partial assignments of this Agreement including, without limitation, the partial assignment of any right to receive payments from SBGC.

3.14 **Force Majeure.** Neither party shall be obligated to perform any duty, requirement or obligation under this Agreement if such performance is prevented by fire, hurricane, earthquake, explosion, wars, sabotage, accident, flood, acts of God, strikes, or other labor disputes, riot or civil commotions, or by reason of any other matter or condition beyond the control of either party, and which cannot be overcome by reasonable diligence and without unusual expense (“Force Majeure”). In no event shall a lack of funds on the part of either party be deemed Force Majeure.

3.15 **Place of Performance.** All obligations of SBGC under the terms of this Agreement are reasonably susceptible of being performed in Gadsden County, Florida and shall be payable and performable in Gadsden County, Florida.

3.16 **Severability.** In case any one or more of the provisions contained in this Agreement shall for any reason be held to be invalid, illegal, unlawful, unenforceable or void in any respect, the invalidity, illegality, unenforceability or unlawful or void nature of that provision shall not effect any other provision and this Agreement shall be considered as if such invalid, illegal, unlawful, unenforceable or void provision had never been included herein.

3.17 **Notice.** When any of the parties desire to give notice to the other, such notice must be in writing, sent by U.S. Mail, postage prepaid, addressed to the party for whom it is intended at the place last specified; the place for giving notice shall remain such until it is changed by written notice in compliance with the provisions of this paragraph. For the present, the Parties designate the following as the respective places for giving notice:

To SBGC: Superintendent of Schools
The School Board of Gadsden County, Florida
35 MLK Jr. Boulevard
Quincy, Florida 32351

With a Copy to: Sharon Thomas, ESE Director
The School Board of Gadsden County, Florida
35 MLK Jr. Boulevard
Quincy, Florida 32351

To SBSC Superintendent of Schools
The School Board of Seminole County, Florida
400 East Lake Mary Boulevard
Sanford, Florida 32773

With a Copy to: Ida Mazar
The School Board of Seminole County, Florida
400 East Lake Mary Boulevard
Sanford, Florida 32773

IN WITNESS WHEREOF, the Parties hereto have made and executed this Agreement on the date first above written.

FOR SBGC

(Corporate Seal)

**THE SCHOOL BOARD OF GADSDEN
COUNTY, FLORIDA**

ATTEST:

By _____
School Board Chair

Superintendent of Schools

Approved as to Form:

School Board Attorney

FOR SBSC


(Corporate Seal)

**THE SCHOOL BOARD OF SEMINOLE
COUNTY, FLORIDA**

ATTEST:



Walt Griffin, Ed.D., Superintendent

By


Karen Almond, Chairman



Witness


Witness

SUMMARY SHEET

Rubright

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

GADSDEN SCHOOL BOARD
OFFICE OF ASSISTANT
SUPERINTENDENT

AGENDA ITEM NO. 8n

2014 JUN 17 PM 5: 37

DATE OF SCHOOL BOARD MEETING: June 24, 2014

TITLE OF AGENDA ITEM: Agreement between State of Florida Department of Education, Division of Vocational Rehabilitation(DOE/DVR) and Gadsden County School District

DIVISION: EXCEPTIONAL STUDENT EDUCATION

YES This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM :(Type and Double Space)

The purpose of this contract is to create and/or expand Community Based Work Experience (CBWE) and career exploration activities for students with the most significant disabilities through braided funding from the Department of Education (DOE). Division of Vocational Rehabilitation (DVR) and the Gadsden County School District. Competitive employment is the first and preferred outcome for transitioning youth with disabilities, including youth with complex and significant disabilities.

SOURCE: DOE/DVR/General funds

AMOUNT: \$62,960.00 (not to exceed)

PREPARED BY: Sharon B. Thomas *SBT*

POSITION: Director of Exceptional Student Education

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

2 Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered 3 & 26

CHAIRMAN'S SIGNATURE: page(s) numbered _____

SCHOOL BOARD ATTORNEY: page(s) numbered _____

This form is to be duplicated on light blue paper.

PROOF READ BY: *Margaret D Bronson*

**STATE OF FLORIDA DEPARTMENT OF EDUCATION
DIVISION OF VOCATIONAL REHABILITATION
CONTRACT
#15-110**

THIS CONTRACT is entered into between the State of Florida, **DEPARTMENT OF EDUCATION, DIVISION OF VOCATIONAL REHABILITATION (DOE/DVR)**, whose address is 4070 Esplanade Way, Tallahassee, Florida 32399-7016, hereinafter referred to as the "DVR", and **Gadsden County School District**, whose address is 35 Martin Luther King, Jr. Boulevard, Quincy, Florida 32351, hereinafter referred to as the "School District", to provide services that enable eligible persons with disabilities to prepare for, obtain, maintain, or regain employment; to expand transition services with Non-paid and Paid Community Based Work Experiences (CBWE) to Vocational Rehabilitation (VR) Transition Students with an implemented Individualized Plan for Employment (IPE) through Arrangements requiring match using non-federal funds with Florida School Districts.

I. Overview:

A. Background

The Florida Vocational Rehabilitation Program is operated by the Department of Education's Division of Vocational Rehabilitation. All program activities are conducted in accordance with the regulations found in 34CFR Part 361 and Florida Statute Chapter 413, Part II. Services are provided statewide through a combination of in-house and privatized staff. DVR and contracted providers work as partners in interdependent relationships to provide quality vocational rehabilitation services to persons with disabilities in Florida.

Third Party Cooperative Arrangements (TPCA) provide an innovative approach to creating and/or expanding Community Based Work Experiences (CBWE) and career exploration activities through cost sharing between DVR and Florida a Local Education Agency (LEA) for Full-Time-Equivalent School District Employment Specialists (ES). These positions provide work experiences for VR Transition Students with IPE's who needed guidance in developing appropriate work skills, attitudes, and behaviors required to plan for and achieve successful postsecondary employment.

Prior to implementing TPCA in October 2006, DVR primarily received applications from Transitioning Students during their last year of high school. TPCA provide a means for Vocational Rehabilitation (VR) staff to work more collaboratively with Local Education Agencies and engage students with disabilities earlier, thereby allowing a seamless transition from high school to postsecondary education, training, or employment. Early referral, application, and the provision of work experiences through a TPCA were intended to allow VR counselors the opportunity to establish effective counseling relationships and rapport with students, families and educators. In addition, TPCA offered a means for DVR to utilize General Revenue funds, as provided by a LEA, to meet federal match requirements in order to draw down all available federal monies for VR client services.

B. Purpose

The purpose of this contract is to create and/or expand Community Based Work Experience (CBWE) and career exploration activities for students with the most significant disabilities through braided funding from the Department of Education (DOE), Division of Vocational Rehabilitation (DVR) and the School District. Competitive employment is the first and preferred outcome for transitioning youth with disabilities, including youth with complex and significant disabilities. Paid CBWE is being emphasized in these arrangements as an evidence-based indicator for student success in postsecondary employment and independent living. DVR funding will be for deliverable services provided by up to two (2) Full-Time-Equivalent (FTE) School District Employment Specialist (ES) positions that will provide Supported Employment (SE) services to VR Transition Students with an implemented SE Individualized Plan for Employment (IPE). Students shall receive assistance in developing appropriate work skills, attitudes, behaviors, and work tolerance needed to plan for and achieve successful post high school employment.

This Arrangement allows DVR to supplement services provided by the School District to students who are applicants for VR services or students eligible for VR SE services and not on a waiting list as a result of Order of Selection (OOS) or students with an implemented SE IPE. The School District shall not use DVR funding support to supplant the current level of services provided to the students. Each ES shall provide at least six (6) VR Transition Students, with an implemented SE IPE, with a CBWE by the end of the school year. In addition, each ES shall assist VR Applicants and VR Eligible students by referring them to the local One-Stop for comparable services and benefits that are commensurate to the services that the student would otherwise receive from VR.

II. Contract Documents

The documents establishing and constituting the contractual relationship between the Department and the Contractor, referred to collectively as the "Contract", supersede all prior agreements and understandings, written or oral. This Contract and its attachments, as referenced below, contain all the terms and conditions agreed upon by the Parties:

1. Attachment A: Scope of Services (12 Pages)
2. Attachment C: Standard Terms and Conditions (9 Pages)

III. Contract Management

The DVR and the Contractor hereby designate their respective representatives identified below for coordination, communication, and management of this Contract:

For the DVR:

Myron Cobbs, Contract Manager
Division of Vocational Rehabilitation
4070 Esplanade Way, Suite 260K
Tallahassee, FL 32399
Phone: 850-245-3348
Email: myron.cobbs@vr.fldoe.org

For the Contractor:

Sharon Thomas, Director of ESE
Gadsden County School District
35 Martin Luther King, Jr. Blvd.
Quincy, FL 32351
Phone: 850-627-9651 Ext. 1239
Email: thomass@gcpsmail.com

All matters shall be directed to the Contract Managers named above for appropriate action or disposition. A change in Contract Manager by either Party shall be reduced to writing through an amendment or minor modification to this Contract.

IV. Contract Term

- A. This Contract shall begin upon execution by both Parties on August 1, 2014, (whichever is later) and end on June 30, 2015, inclusive.
- B. In accordance with Section 287.057(13), Florida Statutes, this Contract may be renewed for 3 one (1) year periods or the term of the original Contract, whichever period is longer. Renewal of the Contract shall be in writing and subject to the same terms and conditions set forth in the initial contract and any written amendment signed by both parties. Renewals are contingent upon satisfactory performance evaluations by the Department, are subject to the availability of funds, and optional to the Department.

V. Approval and Execution

IN WITNESS THEREOF, the Parties hereto have caused this twenty-five (25) page Contract, which includes any referenced attachments, to be executed by their undersigned officials as duly authorized. This Contract is not valid until signed and dated by both Parties.

CONTRACTOR/RECIPIENT NAME

DEPARTMENT OF EDUCATION

SIGNED BY: _____
NAME: _____
TITLE: _____
DATE: _____

SIGNED BY: _____
NAME: Pam Stewart
TITLE: Commissioner of Education
DATE: _____

SIGNED BY: _____
NAME: Cathy McEachron
TITLE: For the Director
Division of Vocational Rehabilitation
DATE: _____

**Approval of Department's Office of General Counsel
as to form and legality:**

SIGNED BY: _____

NAME: _____

TITLE: _____

DATE: _____

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ATTACHMENT A SCOPE OF SERVICES

A. Overview and Purpose:

The Third Party Cooperative Arrangements will create and/or expand Community Based Work Experience (CBWE) and career exploration activities for students with the most significant disabilities through braided funding from the Department of Education (DOE), Division of Vocational Rehabilitation (DVR) and the School District. Competitive employment is the first and preferred outcome for transitioning youth with disabilities, including youth with complex and significant disabilities. Paid CBWE is being emphasized in these arrangements as an evidence-based indicator for student success in postsecondary employment and independent living. DVR funding will be for deliverable services provided by up to two (2) Full-Time-Equivalent (FTE) School District Employment Specialist (ES) positions that will provide Supported Employment (SE) services to VR Transition Students with an implemented SE Individualized Plan for Employment (IPE). Students shall receive assistance in developing appropriate work skills, attitudes, behaviors, and work tolerance needed to plan for and achieve successful post high school employment.

This Arrangement allows DVR to supplement services provided by the School District to students who are applicants for VR services or students eligible for VR SE services and not on a waiting list as a result of Order of Selection (OOS) or students with an implemented SE IPE. The School District shall not use DVR funding support to supplant the current level of services provided to the students. Each ES shall provide at least six (6) VR Transition Students, with an implemented SE IPE, with a CBWE by the end of the school year. In addition, each ES shall assist VR SE IPE students by referring them to the local One-Stop for comparable services and benefits that are commensurate to the services that the student would otherwise receive from VR.

B. Definitions:

1. Community Based Work Experience (CBWE) – May be paid or unpaid, where the student learns firsthand the necessary work skills, attitudes and behaviors at an integrated worksite.
2. Competitive Employment- Fully integrated in the community workforce, where an individual is paid by an employer at minimum wage or greater or receives earnings through one's self-employment business; including supported employment, customized employment, and self-employment.
3. Discovery – A time-intensive, comprehensive, person-centered assessment that determines where and when students perform at their best. Information is gathered through a series of interviews, activities, and observations. Interviews are conducted with the students, family, friends, teachers, neighbors, and others. The focus is on learning about the students' strengths, interests, talents, goals, and conditions for success. This information is assimilated and summarized into profiles that are useful in students' employment planning and establishing employment goals.
4. DVR Counselor – Provides vocational rehabilitation services to disabled individuals in order to facilitate their employment and/or reemployment. The DVR Counselor interviews and evaluates

applicants, and confers with medical and professional personnel to determine type and degree of disability, eligibility for service, and feasibility of vocational rehabilitation.

5. Employment Specialist (ES) – School District personnel who provides TPCA services to students with disabilities to facilitate their employment and/or reemployment. The ES is responsible for providing each referral student with a CBWE by using assessment information about the student seeking a work experience to target the types of work experiences available from potential employers in the local labor market.
6. Individual Educational Plan (IEP) – Plan which defines the individualized objectives of a student who has been determined to have a disability and requires special education services to reach his/her educational goals.
7. Individualized Plan for Employment (IPE) – Plan which identifies the chosen employment goal, services needed to obtain that goal, service providers, service payers, and the amount of financial participation, if any.
8. One Stop – Florida's One-Stop Center network was established to bring workforce and welfare transition programs together under one physical or "virtual" roof to simplify and improve access for employers seeking qualified workers or training programs for their existing employees and job seekers. There are nearly 100 One-Stop Centers across Florida managed at the local level by regional workforce boards. Some are full-service centers providing direct access to a comprehensive array of programs at a single location, while others are satellite facilities capable of providing referrals or electronic access.
9. REBA TPCA – Rehabilitation Electronic Billing Application for TPCA is a web-based application for service providers, contract managers, and school district point of contacts. The application provides a centralized portal for managing referrals, reports and invoices.
10. Supported Employment (SE) – An employment model that provides services for individuals with the most significant disabilities who require ongoing support services to succeed in competitive employment. Intense job training is provided initially and then long-term supports are provided once the person has stabilized on the job.

C. **Manner of Service(s) Provision:**

Each ES shall provide at least six (6) VR Transition Students, with an implemented SE IPE, a CBWE by the end of the school year. The ES shall assist VR SE IPE students by referring them to the local One-Stop for comparable services and benefits that are commensurate to the services that the student would otherwise receive from DVR.

1. *DVR's Responsibilities*

- a) DVR will designate a representative to act for VR in all matters pertaining to this Arrangement.

- b) DVR will use the Operational Policies and Procedures for Counselors as the primary reference and source of information for VR Counselors and VR Technicians providing transition services to youth with disabilities in high school.
- c) DVR will provide a copy of the IPE and each IPE amendment to the School District.
- d) DVR will coordinate the IEP and IPE, with associated documentation and data collection.
- e) DVR will maintain copies of all CBWE reports in the VR case record.
- f) DVR will accept and approve deliverables, invoices, and authorizations for services where appropriate for all matters pertaining to this Arrangement.
- g) DVR will reimburse the school district at a fixed price of \$31,480.00 for each ES that will be providing service under this Arrangement. DVR will provide the School District with all DVR approved training and forms needed for invoicing and the reporting of deliverables under this Arrangement.
- h) DVR will research and respond to all School District requests for technical assistance in writing within five (5) business days.
- i) DVR will cooperate on all matters requiring concurrence or approval so that the School District will not be delayed in performance of all terms and conditions of this Arrangement.
- j) DVR will provide administrative supervision in regard to decision-making and oversight of programmatic activities in accordance with federal regulations at 34 CFR 361.28.

2. *School District Responsibilities*

- a) The School District shall employ a maximum of two (2) Employment Specialists to provide services under this Arrangement. Each ES shall spend 100% of their time providing employment services described in this Arrangement to VR SE IPE students. The services provided by the ES shall not be those typical or customary services provided by the school district but must be new or expanded services made possible under this Arrangement. All services shall be based on the individual needs of the student and provided by the ES pursuant to the student's needs.
- b) The School District shall designate a representative to act for the School District in all matters pertaining to this Arrangement.
- c) The School District shall request and obtain written approval from DVR before allowing the ES to provide CBWE services.
- d) The School District shall verify/provide documentation the ES is an employee of the School District.

- e) The School District shall submit the School District personnel action form (from the Human Resource Department), with the ES name, hire date, actual salary and terms of employment to the DVR Representative (Contract Manager).
- f) The School District shall provide a copy of the student's current Individual Educational Plan (IEP) and each IEP thereafter while participating in a VR IPE to the VR Counselor.
- g) The School District shall provide non-federal match requirement to DVR in the amount of \$8,520.00 for each ES that will be providing service under this Arrangement.
- h) The School District shall process and submit all reports, invoices and supporting documentation using the Rehabilitation Electronic Billing Application TPCA (REBA TPCA), unless given written authorization by DVR to use an alternative method of approval for TPCA services.
- i) The School District shall make all requests for technical assistance in writing to the DVR Contract Manager listed in Section III.
- j) The School District shall maintain documents to support deliverables in a safe and secure location to provide for the integrity of the records, the student's safety and confidentiality. These records and their location are subject to inspection and must be made available for review upon request.

3. *Services Provided by the Employment Specialist*

- a) **Community Based Work Experience development and the Provision of Work Experience.** This is done by using assessment information about the student seeking a work experience to target the types of work experiences available from potential employers in the local labor market and includes:
 - i. Contacting employers and building networks to develop and/or identify work experiences;
 - ii. Assisting the student with identifying worksites and ensuring the student has transportation to worksite. (If the student needs transportation the School District shall arrange or provide.);
 - iii. Referring students to worksites for potential work experiences;
 - iv. Providing VR SE IPE students with work experiences, as appropriate;
 - v. Ensuring that the work site is an individual work experience and not be part of an enclave or mobile work crew based upon the U.S. Department of Labor definitions as follows:
 - (1) Enclave is a small group of people with disabilities (generally 5 - 8) trained and supervised among employees who are not disabled at the host company's work site.
 - (2) Mobile Work Crew is a small crew of persons with disabilities (up to 6) working as a distinct unit and operates as a self-contained business that generates

employment for their crew members by selling a service. The crew works at several locations within the community;

- vi. Conducting job analysis, to include, as appropriate:
 - A systematic investigation of the discrete tasks, working conditions, and requisite knowledge, skills, and aptitudes needed to perform a job.
 - Identifying the essential functions of a job. The essential job functions are those job duties which must be completed, with or without accommodation.
 - Use of the job analysis to match individuals to positions that best meet their needs and the needs of an employer. A job analysis is also useful in identifying and developing potential accommodations needed for individuals with disabilities to perform certain task.
 - vii. Conducting "Discovery" activities, to include, as appropriate:
 - Identifying an individual's skills, talents, contributions, and interests in multiple settings to determine where they are at their best and their ideal conditions for employment.
 - Use of various activities to obtain this information, including meetings with families and others familiar with the individual, paid/unpaid work experiences, and observations of performance at home, school or in the community. and
 - viii. Connecting the student with the local One-Stop.
- b) **Job Retention Support.** This is ongoing job support services that are employment-related, and needed to promote retention in the worksite. Job Retention Support services may consist of:
- i. Routine follow-up with the employer and the student to promote CBWE success;
 - ii. Support services to address issues such as a decrease in productivity of the student receiving services;
 - iii. Providing worksite consultation to identify barriers to employment, when appropriate; and
 - iv. Negotiating CBWE worksite accommodations.
- c) **Job Coaching.** This is the use of structured intervention techniques to help the employee learn to perform job tasks and develop the interpersonal skills necessary to be accepted as a worker at the job site. Job Coaching services may consist of:
- i. One-on-one job duty instruction as a service to VR Transition Students who have a goal of supported employment. These are students who require individual assistance in learning job tasks, often requiring a job coach that understands a specific learning style by which the student learns best and how to break tasks down into discrete steps to teach the necessary job tasks. Some students may initially require coaching for a particular job, but may not require coaching throughout their work life. Most would require ongoing supports through an identified service provider or other means.
 - ii. Assist a service provider with understanding all factors impacting the student's employment during a VR Transition Student's shift to long-term follow-along services

including such as any specific training issues or concerns, co-worker and employer expectations, family concerns, mode of transportation, etc. This assures the process goes smoothly and that the service provider has a complete understanding of the student's specific long-term needs.

- iii. Use structured intervention techniques including conducting situational assessments, possibly using Discovery to ensure the student is well-matched to a particular job that he or she desires and has the potential to learn; conducting job site and environmental analysis to further ensure the job is a good match for the student; developing and implementing task analysis, with prompting and building in self-management strategies if needed to teach the discrete steps of the job and enhance the student's capacity to perform independently; to help the VR Transition Student learn to perform job tasks to the employer's specifications and to learn the interpersonal skills necessary to be successful in their employment and within the community.

4. *Deliverables & Minimum Service Levels*

Contract deliverables, including associated tasks and performance standards, are described in Table 1 – *Deliverables*.

TABLE 1 – Deliverables			
<i>No.</i>	<i>Deliverable</i>	<i>Tasks</i>	<i>Performance Standard(s)</i>
1.	The School District shall provide each referral student with a CBWE by using assessment information about the student seeking a work experience to target the types of work experiences available from potential employers in the local labor market.	<p>The School District shall:</p> <ul style="list-style-type: none"> ▪ routinely communicate with VR Counselors regarding student referrals and student progress; ▪ contact and network with potential employers and build, develop and/or identify work experiences; ▪ conduct Discovery activities to identify the student's abilities and interests in multiple settings to determine their ideal conditions for employment and conduct Job Analysis to determine the working conditions, essential functions and necessary skills needed for job performance and identify individuals who may benefit from that 	<p>The School District shall provide a monthly report of Services provided to the VR Transition student by the Employment Specialist directly related to the Scope of Work. The report must include the number of students served during the report period; the level of progression per student; and a current listing of all students the school district plans to serve under the TPCA during school year 2014/2015.</p> <p>These services must be documented electronically in REBA TPCA in the form of a Student Progress Report and a CBWE Rating Form and submitted to the VR Counselor for approval at the end of each month.</p>

TABLE 1 – Deliverables

		<p>CBWE; and</p> <ul style="list-style-type: none"> ▪ assist the student with identifying worksites and ensure student has transportation to the worksite. ▪ refer student to the local One-Stop for comparable services and benefits that are commensurate to the services that the student would otherwise receive from VR. 	
2.	<p>The School District shall provide each referral student with ongoing job retention support services that are employment-related and needed to promote retention in the worksite.</p>	<p>The School District shall provide worksite consultation to identify barriers to employment and negotiate CBWE worksite accommodations.</p> <p>The School District shall conduct routine follow-up with the employer and student to assess job performance and/or job deficiencies; and.</p> <p>The ES shall have the CBWE employer evaluate the performance of each student using the CBWE Rating Form; submitted starting at the end of the first full month of SPR reporting.</p>	<p>The School District shall provide a monthly report of Services provided to the VR Transition student by the Employment Specialist directly related to the Scope of Work. The report must include the number of students served during the report period; the level of progression per student; and a current listing of all students the school district plans to serve under the TPCA during school year 2014/2015.</p> <p>These services must be documented electronically in REBA TPCA in the form of a Student Progress Report and a CBWE Rating Form and submitted to the VR Counselor for approval at the end of each month.</p>
3.	<p>The School District shall provide job coaching by using specific intervention techniques, appropriate to the student's needs, to help the</p>	<p>The School District shall provide one-on-one job duty instruction as a service to VR Transition Students who have a goal of supported</p>	<p>The School District shall provide a monthly report of Services provided to the VR Transition student by the Employment Specialist directly</p>

TABLE 1 – Deliverables		
<p>student learn to perform job tasks and develop interpersonal skills necessary to be accepted as an employee at the job site.</p>	<p>employment.</p> <p>The School District shall conduct job site and environmental analysis to further ensure the job is a good match for the student.</p> <p>The School District shall develop and implement task analysis, to teach the discrete steps of the job and enhance the student's capacity to perform independently, learn to perform job tasks to the employer's specifications and to learn the interpersonal skills necessary to be successful in their employment and within the community.</p> <p>The ES shall have the CBWE employer evaluate the performance of each student using the CBWE rating form.</p>	<p>related to the Scope of Work. The report must include the number of students served during the report period; the level of progression per student; and a current listing of all students the school district plans to serve under the TPCA during school year 2014/2015.</p> <p>These services must be documented electronically in REBA TPCA in the form of a Student Progress Report and a CBWE Rating Form and submitted to the VR Counselor for approval at the end of each month.</p>

TABLE 2 - Minimum Service Levels	
1.	The School District shall provide a minimum of six (6) VR Transition Students with an implemented SE IPE a CBWE by the end of the school year.
2.	Each ES shall spend 100% of their time providing employment services to TPCA approved VR Transition Students as evidenced by a signed monthly Time Certification document and other reports on activities, to be completed by the School District in the REBA TPCA system.

5. *Reporting*

- a) The School District shall provide a monthly report of all Deliverables (ES student services provided and CBWE performance activity and evaluation as described in Table 1 - Deliverables) not later than 30 days following the end of the month for which services were provided.

- b) The School District shall provide a Student Progress Report (SPR) at the end of each month in the REBA TPCA system.
- c) The School District shall provide a CBWE Rating Form, per student, upon the first complete month of SPR reporting in the REBA TPCA system.

6. *Monitoring*

- a) The provision of services will be monitored through a review of the monthly reports (SPR and CBWE Rating form) and the monthly invoice with ES time certification received from the School District.
- b) The Contract Manager may conduct periodic monitoring visits during the Contract period to verify School District compliance.

D. **Method of Payment:**

1. This is a Fixed Price Contract not to exceed \$62,960.00 for the 2014 - 15 school year.
2. The School District shall provide non-federal funds to VR in the amount of \$8,520.00 for each ES that will be providing service under this Arrangement. The non-federal funds used must be funds that have not been used as Match in any other federally or state assisted project.
3. Upon receipt of a properly submitted invoice, DVR will reimburse \$3,148.00, or in proportion to the months in the school year (whichever is lesser), per month, for each Employment Specialist.
4. DVR will not make payment until the School District has fulfilled their non-federal match requirement.
5. Invoicing
 - a) Use of REBA TPCA (Rehabilitation Electronic Billing Application – TPCA) website is a condition of this contract. This includes the electronic signing of documents through submission in the REBA TPCA system.
 - b) The School District shall submit a properly completed invoice on a monthly basis, including all supporting documentation, to the Contract Manager no later than thirty (30) days after the close of monthly business.
 - c) The invoice shall include, at a minimum:
 - i. A completed, signed DVR Source of Funding Certification & Invoice Itemization form that verifies the source of non-federal funds used for match amounts reported for services by the School District have not been used in any other federally assisted project or program; and certifies that the ES for which payment is being requested,

devoted 100% of time worked to specific programs/activities outlined under this arrangement for the period reported;

- ii. A list of students that have received or are receiving services during the invoiced period;
 - iii. Other documentation that may be requested by the Contract Manager.
- c) The school district shall retain documentation in an auditable format sufficient for proper pre and post audit requirements and at one location as they relate to each invoice submitted to the DVR and provide to the DVR upon request.

E. Financial Consequences:

If the School District fails to comply with the activities and deliverables established in the Contract or make appropriate progress on activities and/or towards deliverables, DVR may terminate the Contract, refuse to pay an invoice until all work is properly completed, assess liquidated damages as provided herein, and/or implement a Corrective Action Plan (CAP) as described below.

1. Corrective Action Plan (CAP)

- a) If DVR determines that the School District is out of compliance with any of the provisions of this Contract, DVR may require the School District to submit a Corrective Action Plan (CAP) within a specified timeframe. The CAP shall provide an opportunity for the School District to resolve deficiencies without DVR invoking more serious remedies, up to and including Contract termination.
- b) In the event DVR identifies a violation of this Contract, or other non-compliance with this Contract, DVR will notify the School District of the occurrence in writing. DVR will provide the School District with a timeframe for corrections to be made.
- c) The School District shall respond by providing a CAP to DVR within the specified timeframe.
- d) The School District shall implement the CAP only if DVR approves the use of a CAP and the terms of the CAP.
- e) If the School District does not meet the standards established in the CAP within the agreed upon timeframe, the School District shall be in violation of the provisions of this Contract and shall be subject to liquidated damages, if applicable, and/or termination.

2. Liquidated Damages

Accurate and timely delivery is imperative and, as a result, the Contract includes liquidated damages for failure to perform as indicated below. The parties agree that the School District's

failure to perform as indicated below will result in substantial injury to the Department but the amount of damages resulting from such injury cannot be calculated with certainty. Therefore, for each such failure the School District shall compensate the Department, but not as a penalty, as indicated below. The Department may reduce the corresponding invoice, or next immediate invoice, by the amount of such liquidated damages.

- a) The total DVR portion for the school year will be reduced by one-sixth (1/6) for each student who has not engaged in a paid or non-paid CBWE per ES unless the reason for not meeting the outcome goal is due to the lack of VR students with an implemented IPE due to the Order of Selection.
- b) Upon DVR confirmation of an ES spending less than the required 100% of the time providing TPCA service, the School District will be assessed the full amount of the FTE payments made on behalf of the ES when services were provided at less than the 100% stipulated in the contract.
- c) Final Invoice (Withholding Payment) - The School District shall submit the final invoice for payment no more than sixty (60) days after the Arrangement ends or is terminated. If the final invoice cannot be submitted within the required sixty (60) day period, the School District must submit a written request for extension to the DVR Contract Manager for approval prior to the sixty (60) day deadline. The request must include a description of the circumstances that resulted in a need for additional time for the submission of the invoice. The DVR Contract Manager will respond to the request within ten (10) working days after receipt of the request. The DVR will not honor any requests submitted after the aforesaid time period unless a written request for extension is received prior to the sixty (60) day deadline. If the School District fails to do so, all rights to payment are forfeited.

Payments due under the terms of this Arrangement may be withheld pending the receipt and approval by DVR of all SPR's, CBWE Rating forms and invoices, with supporting documentation requested from the School District

Invoice payment requirements do not start until the DVR receives a properly completed invoice and approves deliverables.

F. Special Provision(s):

1. TPCA Staffing

- a) The school district is responsible for the proficiency of ES positions, assuring that each ES has the required experiences and skills to provide tasks identified in (Table 1 – Deliverables) of the contract.

2. Applicable Laws

- a) This Contract is governed by the following State and Federal regulations:

Federal and State: The Rehabilitation Act of 1973 as amended, Florida Statutes, Chapter 413 (Part II), Public Law 93-112 as amended by Public laws 93-516, 98-221, 99-506, 100-

630, 102-569, 103-073, and 105-220. Other applicable regulations include OMB Circulars A-87, the Education Department of General Administrative Regulations (EDGAR), the DOE/DVR State Plan and the State Program Regulations in the Code of Federal Regulations, Part 361.

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**STATE OF FLORIDA, DEPARTMENT OF EDUCATION
DIVISION OF VOCATIONAL REHABILITATION
ATTACHMENT C – STANDARD TERMS AND CONDITIONS**

I. Composition of Contract; Entire Contract; No Modifications Except in Writing. The agreement between the Department of Education/Division of Vocational Rehabilitation (DOE/DVR) and Contractor concerning the subject matter hereof consists of the Contract, this Attachment and all other attachments and exhibits referenced herein or in the Contract. In the event there is any inconsistency between the provisions of the Contract and the provisions of this Attachment or any other attachment or exhibit, the provisions of the Contract shall govern and control. The Contract, this Attachment and all other attachments and exhibits referenced herein or in the Contract may be referred to collectively as the "Contract." The Contract represents the total and complete agreement of DOE/DVR and Contractor relating to the subject matter of the Contract. The Contract supersedes any prior or contemporaneous written or oral agreements or representations relating to the subject matter of the Contract. No purported modification of the Contract shall be valid or binding on either party unless such modification is contained in a document executed by both parties.

II. The Contractor Agrees:

A. To comply with all applicable laws, statutes and regulations of the State of Florida and the United States, and to complete any forms required under such laws, statutes and regulations, whether or not such forms are referenced in this Contract.

B. Audits and Records.

1. To maintain (in accordance with generally accepted accounting procedures) and retain, during and for five (5) years after termination of this Contract, books, records and all other documents relating to this Contract. Such will sufficiently and properly reflect all expenditures of funds provided by DOE/DVR under this Contract (collectively, the "Records"). If an audit has been initiated and audit findings have not been resolved at the end of such five (5) year period, Contractor shall retain the Records until resolution of the audit findings.
2. To assure that state personnel, federal personnel and personnel authorized by the DOE/DVR shall have full access to the Records during the time Contractor is obligated to retain same.
3. To provide access to and, at the request of DOE/DVR, to furnish whatever information is deemed

necessary by DOE/DVR to be assured of satisfactory performance of the terms and conditions of the Contract. This includes access to financial reports, personnel and personnel work records. Any written comments from DOE/DVR to the Contractor regarding deficiencies in Contractor's performance must be responded to by the Contractor within the time specified in such comments. The Contractor shall either rectify such deficiencies or supply a reasonable written justification for not correcting such deficiencies.

4. The contractor agrees to permit onsite visits by designated DOE/DVR employees or agents to conduct audits to ensure compliance with Section 20.055, Florida Statutes. These audits may require department access to records and data, computers and communications devices and other materials whether owned or operated by the Contractor. Access may include, but is not limited to, user level and/or system level access to any computing or communications device; access to information (electronic, hardcopy, etc.) that may be produced, transmitted, or stored on the Contractor's equipment or premises; access to work areas; and access to interactively monitor and log traffic on the Contractor's networks.

5. To file with the DOE/DVR such Records as the DOE/DVR may require (in its sole discretion) within one (1) year after the completion of performance under this Contract.

6. To allow public access to all documents, papers, letters, or other materials made or received by Contractor in conjunction with this Contract, subject to the provisions of Chapter 119, Florida Statutes, §11 (F) below and other applicable law. DOE/DVR may unilaterally cancel this Contract if the Contractor refuses to allow access by members of the public to all documents, papers, letters and materials made or received in conjunction with the Contract that are subject to Chapter 119, Florida Statutes, and are not exempt from public inspection by Section 119.071 Florida Statute and other provisions of general or special law.

7. In accordance with the provisions of OMB Circular A-133, as revised, in the event that it expends equal to or in excess of the Federal thresholds for awards in its fiscal year and is otherwise subject to OMB Circular A-133, to have a single or program-specific audit conducted in accordance with the provisions of OMB

**STATE OF FLORIDA, DEPARTMENT OF EDUCATION
DIVISION OF VOCATIONAL REHABILITATION
ATTACHMENT C – STANDARD TERMS AND CONDITIONS**

Circular A-133, as revised. In determining the Federal awards, expended in its fiscal year, the Contractor shall consider all sources of Federal awards, including Federal funds received from DOE/DVR. The determination of amount of Federal awards expended should be in accordance with the guidelines established by OMB Circular A-133, as revised. An audit conducted by the Auditor General in accordance with the provisions of OMB Circular A-133, as revised, will meet the requirement of this part.

8. In connection with the audit requirements addressed above in Section II, Paragraph 7, to fulfill the requirements relative to auditee responsibilities as provided in Subpart c of OMB Circular A-133, as revised.

9. If it expends less than the Federal threshold for awards in its Fiscal year, an audit conducted in accordance with the provisions of OMB Circular A-133, as revised is not required. In the event that the Contractor expends less than the Federal threshold for awards in its fiscal year and elects to have an audit conducted in accordance with the provision of OMB Circular A-133, as revised, the cost of the audit must be paid from non-Federal funds (i.e., the cost of such an audit must be paid from funds obtained from other than Federal entities).

10. In accordance with 215.97, Florida Statutes, applicable rules of the Office of the Governor and the Comptroller, if it expends a total amount of State awards (i.e., State Financial assistance provided to the Contractor to carry out a State project) equal to or in excess of the State threshold in any fiscal year of such Contractor, and is otherwise subject to 215.97, Florida Statutes, to have a single State or project-specific audit for such fiscal year. In connection with the audit requirements addressed in paragraph 10, the Contractor shall ensure the audit complies with the requirements of 215.97(7) Florida Statutes. This includes submission of a reporting package as defined by 215.97(2)(d), Florida Statutes.

11. If it expends less than the State threshold for awards in its fiscal year, an audit conducted in accordance with the provisions of 215.97, Florida Statutes, is not required. In the event that the Contractor expends less than the State threshold for awards in its fiscal year and elects to have an audit conducted in accordance with the provision of 215.97, Florida Statutes, the cost of the audit must be paid

from non-State funds (i.e., the cost of such an audit must be paid from the funds obtained from other than State entities).

C. Monitoring by DOE/DVR.

1. To permit persons duly authorized by the DOE/DVR, state and federal auditors full access to and the right to examine any of said records and documents at all reasonable times during the period of this Contract, during said retention period or as long as records retained, which ever is later. Those persons authorized to do so shall be entitled to inspect any records, papers, documents, facilities, or services of the Contractor relevant to this Contract and may interview Contractors of services and employees of the Contractor to be assured of satisfactory performance of the terms and conditions of the Contract. Following such inspection DOE/DVR shall deliver to the Contractor a written report of the findings, including specifically any noted deficiencies concerning the manner in which services are being provided. The Contractor will correct all noted deficiencies identified by the DOE/DVR within the specified period set forth in the recommendations.

2. In addition to reviews of audits conducted in accordance with OMB Circular A-133, as revised, monitoring procedures may include, but not be limited to, on site visits by DOE/DVR, limited scope audits as defined by OMB Circular A-133, as revised, and/or other procedures. By entering into this Contract, the Contractor agrees to comply and cooperate with any monitoring procedures/process deemed appropriate by the DOE/DVR. In the event DOE/DVR determines that a limited scope audit of the Contractor is appropriate, the Contractor agrees to comply with any additional instructions provided by DOE/DVR regarding such audit. The Contractor further agrees to comply and cooperate with any inspections, reviews, investigations, or audits necessary by the Comptroller or the Auditor General or other authorized body.

D. Indemnification. To indemnify, defend, and hold harmless DOE/DVR, its attorneys, agents, and employees, to the full extent allowed by law, from all claims, suits, judgments, debts, or damages, arising out of Contractor's performance or failure to perform under this contract, the negligent acts, negligent omissions or willful conduct of the Contractor relating

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to this Contract. The indemnification shall include reasonable attorney's fees and costs incurred by the DOE/DVR, its attorneys, agents and employees in the defense of any such suits, claims, or causes of action, as aforesaid. Nothing in this Contract is intended to serve as a waiver of sovereign immunity, nor shall anything in this Contract be construed as consent by a state agency or political subdivision of the State of Florida to be sued by third parties in any matter arising out of any agreement.

E. Insurance. The Contractor must carry general liability insurance, which shall include errors and omissions coverage. The amount of coverage shall be a minimum of \$1,000,000 or the aggregate total of all contractual agreements between the Contractor and the agencies and political subdivisions of the State of Florida, whichever is greater. The Contractor shall add the Department as an additional insured on the general liability coverage. The insurance shall cover all of the Contractor's operations under this Contract and shall be effective throughout the Term of this Contract, as well as any renewals or extensions thereto. It is not the intent of this Contract to limit the types of insurance otherwise required by this Contract or that the Contractor may desire to obtain or be required to obtain by law. The Contractor must submit a Certificate of Insurance indicating coverage for general liability purposes and additional insured coverage, and shall maintain and pay for same throughout the Term of this Contract. A Certificate of Insurance indicating adequate coverage shall be submitted to the Department prior to the time the Contract is entered. Any and all insurance policies shall be through insurers qualified to do business in Florida.

F. Safeguarding Information.

1. Not to use or disclose any information concerning applicants or recipients of services under or incident to this Contract for any purpose not in conformity with state regulations and Federal law or regulations (45 CFR, Part 205.50, 34 CFR PART 361.38 and other applicable laws), except upon written consent of the applicant or recipient, or the responsible parent or guardian when authorized by law.
2. The Contractor is subject to all provisions of confidentiality of client records as set forth in § 413.341, Florida Statutes.

G. Return of Funds The Contractor agrees to return to DOE/DVR any overpayment due to unearned funds or funds disallowed pursuant to the terms of this Contract, the Vocational Rehabilitation Act of 1973, as amended, or appropriate state, federal regulations, rules and/or laws. In the event that the Contractor or its independent auditor discovers that an overpayment has been made, the Contractor shall repay said overpayment immediately together with an explanation of the funds returned. The return shall be due within forty-five (45) days following the expiration or early termination of this Contract, or within ten (10) days after the overpayment is discovered, whichever is sooner. If Contractor fails to timely repay such funds, the Contractor shall pay to DOE/DVR, in addition to such funds, interest at the rate set pursuant to Section 55.03, Florida Statutes. Interest shall immediately begin to accrue on the unpaid principal balance at the highest rate allowable by applicable laws, through the date on which such funds are fully repaid.

H. Unusual Incident Reporting. To report to DOE/DVR and the Florida Abuse Hotline knowledge of reasonable suspicion of abuse, neglect, or exploitation of a child, aged person, or disabled adult. The Florida Abuse Hotline's statewide toll-free telephone number is 1-800-962-2873. Such reporting to be done in a manner prescribed in Chapter 415, Florida Statutes. This is binding upon both the Contractor and its employees.

I. Transportation Disadvantaged. If customers will be transported under this Contract, to subcontract with the designated Community Coordinated Transportation Contractor, or otherwise comply with the provisions of Chapter 427, Florida Statutes.

J. Civil Rights Certification.

1. To comply with:
 - a. Title VI of the Civil Rights Act of 1964, as amended, which prohibits discrimination on the basis of race, color, or national origin in programs and activities receiving or benefiting from federal financial assistance.
 - b. Section 504 of the Rehabilitation Act of 1973, as amended, which prohibits discrimination on the basis of disability in programs and activities receiving or

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benefiting from federal financial assistance.

c. Title IX of the Education Amendments of 1972, as amended, which prohibits discrimination on the basis of gender in education programs and activities receiving or benefiting from federal financial assistance.

d. The Age Discrimination Act of 1975, as amended, which prohibits discrimination on the basis of age in programs or activities receiving or benefiting from federal financial assistance.

e. The Omnibus Budget Reconciliation Act of 1981, which prohibits discrimination on the basis of gender or religion in programs and activities receiving or benefiting from federal financial assistance.

f. Title VII of the Civil Rights Act of 1964, as amended, which prohibits discrimination with respect to employment, compensation, and terms and conditions of employment on the basis of race, color, religion, gender, or national origin.

g. Florida Human Relations Act, which prohibits discrimination on the basis of race, color, religion, gender, national origin, age, disability, or marital status.

h. Americans with Disabilities Act, which prohibits discrimination by public and private entities on the basis of disability in employment, public accommodations, transportation, state and local government services, and in telecommunications.

i. All other applicable laws, regulations and standards that prohibit discrimination on any basis on which discrimination is prohibited by any of the above-referenced laws.

K. Independent Capacity of the Contractor.

1. To be solely liable for the performance of all tasks contemplated by this Contract which are not the exclusive responsibilities of DOE/DVR.

2. To act in the capacity of an independent contractor and not as an officer, employee or agent of the State of Florida. The Contractor shall not represent to others that it has the authority to bind DOE/DVR unless specifically authorized in writing to do so. In addition to the Contractor, this is also applicable to its officers, agents, employees, subcontractors, or assignees in performance of this Contract.

3. Neither the Contractor, its officers, agents, employees, subcontractors, nor assignees are entitled

to state retirement or state leave benefits, or to any other compensation of state employment as a result of performing the duties and obligations of this Contract.

4. The DOE/DVR will not furnish services or support (e. g., office space, office supplies, telephone service, secretarial or clerical support) to Contractor.

5. All deductions for social security, withholding taxes, income taxes, contributions to unemployment compensation funds and all necessary insurance for the Contractor, the Contractor's officers, employees, and agents shall be the responsibility of the Contractor.

L. Sponsorship. As required by Section 286.25, Florida Statutes, that all notices, informational pamphlets, press releases, advertisements, descriptions of sponsorship of the program research reports, and similar public notices prepared and released by the Contractor shall include the statement: "Sponsored by DOE/DVR and the State of Florida." If the sponsorship reference is in written material, the words "State of Florida, Department of Education/ Division of Vocational Rehabilitation" shall appear in the same size type and emphasis as the name of Contractor or other applicable organization.

M. Invoices

1. The Contractor shall submit properly completed monthly invoices in detail sufficient for a proper pre-audit and post-audit thereof and in a form acceptable to the DOE/DVR covering services rendered and/or goods provided under this Contract together with expenditure reports to support all requests for payment. The Contractor shall request payment on a monthly basis through the submission of properly completed invoices to the Contract Liaison within fifteen (15) days following the end of the month for services that were rendered. These invoices shall be on Contractor's letterhead and must state the total number of customers who received services, the date(s) the services were provided, together with the names of clients served during the payment period. Payments may be authorized only for services listed on the invoice, which are in accord with terms and conditions of this Contract. This requirement shall in no way affect the Final Invoice (Withholding Payment) requirements.

2. Final Invoice (Withholding Payment). The Contractor must submit the final invoice for payment to the

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DOE/DVR no more than sixty (60) days after the Contract ends or is terminated. If the Contractor fails to do so, all rights to payment is forfeited and the DOE/DVR will not honor any requests submitted after the aforesaid time period unless a written request for extension is received prior to the sixty (60) day deadline. The DOE/DVR Contract Liaison shall review all payment requests of the Contractor in a manner that will allow the Contractor to submit an invoice within sixty (60) days. If the final invoice cannot be submitted within the required sixty (60) days period, the Contractor must submit a written request for extension, to the Contract Manager, prior to the sixty (60) day deadline. The request must include a description of the circumstances beyond the Contractor's control that resulted in a need for additional time for the submission of the invoice. The DOE/DVR Contract Managers shall respond to these requests within ten (10) days after receipt of the request.

3. Any payment due under the terms of this Contract may be withheld until all reports due from the Contractor and necessary adjustments thereto, have been approved by the DOE/DVR. The DOE/DVR has final authority on any dispute on invoice payments.

4. The Contractor represents and agrees that information submitted in support of its requests for payment is the basis of payment and is true and accurate to the best of knowledge of the responsible signatory. A violation of this provision shall subject the violator to the provisions of s. 68.082, Florida Statutes, pertaining to false claims against the state and /or s. 837.06, Florida Statutes pertaining to false official statements.

N. Lobbying, Fund-raising and Program Income.

1. To comply with §216.347, Florida Statutes, which prohibits expenditure of contract funds for lobbying the Legislature or a state agency. Fund raising activities shall not be charged to, or reimbursed from, any DOE/DVR Contract proceeds.

2. Program income shall be used, at the direction of the DOE/DVR, to either reduce the Contract award or fund additional services eligible for State and Federal funding. For purposes of this Contract, "program income" shall mean gross income received by Contractor directly generated by a grant supported activity, or earned as a result of this Contract during

the term of this Contract. If any payment due under this Contract results directly from a budget line item submitted by Contractor and Contractor's actual costs or expenditures during the Contract term are less than the amount budgeted, the resulting excess payment shall be deemed, for purposes of this Contract, "program income."

O. ONE-STOPS. To inform DOE/DVR immediately if they are or become a party to any contract with any State of Florida Department ONE STOP, or any "one-stop partner" under the Workforce Investment Act of 1998.

P. Staff, Facilities and Equipment. To maintain sufficient staff, facilities and equipment to deliver the goods and services described in this Contract, and to immediately notify the DOE/DVR whenever Contractor is unable or is going to be unable to provide the required quality or quantity of goods or services. In addition, all facilities or other places of business used in the delivery of services must comply with the design and construction accessible to the physically handicapped per "Architectural Barriers Act of 1968" Section 504 of the Act and ADA.

Q. Authority of Person Executing Contract.

Contractor represents that the person executing this Contract (and any portion thereof) has the actual authority to so execute on behalf of Contractor and that all actions, corporate or otherwise, necessary to such authority have occurred.

R. Relationship of Customer to DOE/DVR.

If the Contractor is hiring or placing for employment any customer of DOE/DVR pursuant to the terms of this Contract, such customer is not an employee of DOE/DVR for any purpose, whatsoever, including without limitation the provision of workers' compensation benefits. Contractor shall notify the employer of this fact.

S. Certification regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion, and Acknowledgment and Representation regarding the Convicted Vendors List.

1. If the amount of federal funds received by Contractor hereunder exceeds \$25,000, the

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Contractor:

- a. Certifies, by signing this Contract, that neither the Contractor nor any of its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this Contract by any federal department or agency and, if the Contractor is unable to certify to any of the statements contained in this section, Contractor shall attach an explanation to this Contract;
 - b. Acknowledges and agrees this certification is a material representation of fact upon which reliance is placed when this Contract is entered into. If it is later determined that the signer or Contractor knowingly rendered an erroneous certification, the Federal Government may pursue available remedies, including suspension and/or debarment;
 - c. Agrees to provide immediate written notice to the Contract Manager at any time the Contractor learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances;
 - d. Acknowledges and agrees the terms "debarred," "suspended," "ineligible," "person," "principal," and "voluntarily excluded," as used in this certification, have the meanings set out in the Definitions and Coverage section of rules implementing Executive Order 1254, Debarment and Suspension, signed February 18, 1986. Contractor may contact the Contract Manager for assistance in obtaining a copy of these rules and regulation.
 - e. Agrees by submitting this certification that it shall not knowingly enter into any subcontract with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this Contract unless authorized by the Federal Government; and
 - f. Agrees it will require each person or entity subcontracted under this Contract receiving payment of \$25,000 or more in federal monies to submit a signed copy of this certification to DOE/DVR.
2. If the amount of federal funds received by Contractor hereunder exceeds \$100,000, the undersigned, on behalf of himself/herself and the Contractor, certifies to the best of his or her knowledge and belief that:
- a. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned or the Contractor, to any person for influencing or attempting to influence an officer or employee of any agency, 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 Federal appropriated funds, have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, in connection with this Federally funded agreement, the undersigned shall complete and submit Standard Form--LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions; and
- c. The undersigned shall require that the language of this certification be included in the award documents for all subawards (including subcontracts, subgrants and contracts under grants, loans and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

The undersigned and Contractor acknowledge THIS CERTIFICATION IS A MATERIAL REPRESENTATION OF FACT UPON WHICH RELIANCE WAS PLACED WHEN THIS CONTRACT WAS MADE OR ENTERED INTO. SUBMISSION OF THIS CERTIFICATION IS A PREREQUISITE TO MAKING OR ENTERING THIS CONTRACT IMPOSED BY SECTION 1352, TITLE 31, U.S. CODE. ANY PERSON WHO FAILS TO FILE THE REQUIRED CERTIFICATION SHALL BE SUBJECT TO A CIVIL PENALTY OF NOT LESS THAN \$10,000 AND NOT MORE THAN \$100,000 FOR EACH SUCH FAILURE.

3. If the amount of funds to be received by Contractor hereunder exceeds the threshold amount provided in Section 287.017, Florida Statutes, for CATEGORY TWO, the undersigned, on behalf of himself/herself, the Contractor, and any affiliate thereof, acknowledges and represents that, as defined and described in Section 287.133, Florida Statutes, persons or affiliates placed on the convicted vendor list—following a conviction for a public entity crime may not be awarded or perform the work under this Contract and that neither the undersigned, the Contractor, nor any affiliate thereof had been placed on the above-

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referenced convicted vendor list within thirty-six (36) months prior to the effective date of this Contract.

T. Vendor Certification. The DOE/DVR adopts the standards for vendor qualifications as those established by Florida Statutes, national certification boards and industries that are applicable. When a vendor is employed in an occupation for which national, state or industry standards have not been established, the DVR may adopt standards, as it deems appropriate, to ensure the provision of quality services to individuals with disabilities. An appeals process shall be developed to include the DVR as the final authority. (Adopted July 12, 2001.) The Contractor and any subcontractors shall comply with the DVR vendor certification standards applicable to the services for which it is contracting and shall maintain such-certification throughout the term of the contract.

U. My Florida Market Place All prospective vendors are required to register online with the My Florida marketplace (MFMP) E-procurement system in order to become certified with DVR. Vendor registration can be completed by visiting the MFMP website at <https://vendor.myfloridamarketpalce.com/>. For additional information or questions, the prospective vendor should contact the MFMP customer service help desk at 1-866-FLA-EPRO (1-866-352-3776) Registration must take place prior to completing the DVR Standard Vendor Application process.

III. THE DOE/DVR Agrees

A. Contract Amount.

1. To pay for contracted services in an amount not to exceed the Contract Amount as stated in the Contract, subject to the availability of funds.
2. The State of Florida's performance and obligation to pay under this Contract is contingent upon an annual appropriation by the Legislature.
3. Contractor shall not be paid under this Contract for any services for which it is paid under any other contract or from any other source.
4. Except as may otherwise be expressly stated in this Contract, DOE/DVR shall not be obligated to pay any amount for expenses, services rendered, or goods provided prior to the effective date of this Contract or for which an invoice for payment has not been

submitted consistent with III. B.

B. Contract Payment.

1. Pursuant to Section 215.422, Florida Statutes, and not later than twenty (20) days after the receipt of the invoice and receipt, inspection and approval of the services, to file with the State Comptroller the voucher authorizing payment of an invoice submitted to DOE/DVR. Submission is to be contingent upon inspection and approval of the goods or services, except that, in the case of a bona fide dispute, the voucher shall contain a statement of the dispute and authorize payment only in the amount not disputed. Such approval is for authorizing payments and does not constitute a final approval of services purchased under this Contract. The date on which an invoice is deemed received is the date on which a properly completed invoice is first received at the place designated by DOE/DVR. A payment is deemed to be issued on the first working day that payment is available for delivery or mailing to the Contractor.

2. If a warrant in payment of an invoice is not issued within forty (40) days after the receipt of the invoice and receipt, inspection, and approval of the services, DOE/DVR shall pay to the Contractor, in addition to the amount of the invoice, interest at the relevant rate authorized under Section 215.422, Florida Statutes, or pay the separate interest penalty set by the Comptroller pursuant to s. 55.03 Florida Statutes in addition to the invoice amount. The Contractor should contact DOE's Fiscal section at 850-245-0402 or Purchasing Office at 850-245-9170. Invoices returned to Contractor due to preparation errors will result in a payment delay. Invoice payment requirements do not start until a properly completed invoice is provided to DOE/DVR.

C. Comptroller's Hotline. Vendors who may be experiencing problems in obtaining timely payment(s) from a state agency may contact the Vendor Ombudsman at 1-866-515-3962 or the State Comptroller's Hotline at 1-800-451-4327. This paragraph is being provided for notice purposes only.

D. Website. DOE/DVR's website is <http://www.rehabworks.org>. Documents on this website are updated to reflect the most recent version(s) available.

IV. The Contractor and DOE/DVR Mutually Agree:

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A. Cancellation

1. Cancellation at Will. DOE/DVR with or without cause may cancel this Contract upon no less than thirty- (30) days notice.

2. Cancellation Because of Lack of Funds. In the event funds to meet DOE/DVR's obligations hereunder become unavailable, the DOE/DVR may, at its discretion, suspend or cancel the Contract upon no less than twenty-four (24) hours notice in writing to the Contractor. In the event the DOE/DVR chooses to exercise its cancellation option under this section, neither party hereto shall have any further rights or obligations hereunder. In the event the DOE/DVR suspends this Contract but does not reinstate it before the end of the Contract term; such suspension shall be considered an exercise of the DOE/DVR cancellation option.

3. Cancellation for Breach. The DOE/DVR may cancel this Contract for reasons of the Contractor's non-performance upon no less than thirty-(30) days notice in writing to the Contractor. If applicable, DOE/DVR may employ the default provisions in Chapter 60A1.006(3), Florida Administrative Code. Waiver of breach of any provisions of this Contract shall not be deemed a waiver of any modification of the term of this Contract. The provisions herein do not limit DOE/DVR's rights to remedies at law or in equity.

4. Failure to have performed any Contract obligation with DOE/DVR in a manner satisfactory to the DOE/DVR will be a sufficient cause for cancellation and termination of Contractor's status. To be terminated as a Contractor under this provision, the Contractor must 1) have previously failed to satisfactorily perform in a Contract with the DOE/DVR; 2) have been notified by DOE/DVR of unsatisfactory performance, and have failed to correct the unsatisfactory performance to the satisfaction of DOE/DVR; and 3) have had a contract terminated by DOE/DVR for cause.

5. Cancellation pursuant to Section II. C. 6. DOE/DVR may cancel for Contractor's refusal to allow access to public documents, etc. that are made or received in conjunction with the Contract that are subject to Chapter 119, Florida Statutes and not otherwise exempt from public inspection.

6. Cancellation for employment of unauthorized aliens. The employment of unauthorized aliens by any

Contractor is considered a violation of Section 274 (e) of the Immigration and Nationality Act. If the Contractor knowingly employs unauthorized aliens, such violation shall be cause for unilateral cancellation of the Contract.

B. Re-negotiation or Modification.

1. Modification of provisions of this Contract shall only be valid when they have been reduced to writing and duly signed by both parties. The Rate of Payment and the total dollar amount may be adjusted to reflect price level increases and changes in the Rate of Payment when these have been established through the appropriations process subsequently identified in DOE/DVR's budgets.

2. In the event that the Governor and Cabinet are required to impose a mandatory reserve on appropriations, the Department shall amend this Contract to place in reserve the amount determined by DOE/DVR to be necessary because of the mandatory reserve. Such amendments may provide for adjustments in the deliverable products and services as may be necessary.

C. Notice and Contact. All notices to DOE/DVR and invoices for payment should be directed to the attention of the Contract Liaison. All notices to Contractor and payments under this Contract shall be directed to Contractor's Contract Representative. In the event that a different Contract Liaison or Contractor's Contract Representative is designated after execution of this Contract, notice of the name and address of the new Liaison or Representative shall be sent in writing within thirty (30) days of such change. The Contractor shall keep DOE/DVR informed of its current telefax number at all times. Unless otherwise provided herein, any notice to be given hereunder shall be in writing and shall be sent by hand-delivery, overnight mail, by U.S. certified mail, postage prepaid, return receipt requested or by telefax. Any notice given by properly addressed and stamped U.S. certified mail, return receipt requested, shall be deemed to be given three (3) days following the date of mailing. Notice by overnight mail shall be deemed to be given one (1) day after such mailing. Notice by telefax shall be deemed to constitute notice by hand-delivery.

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D. Remedies of the DOE/DVR Cumulative. In addition to all remedies available to DOE/DVR hereunder, in the event Contractor breaches its obligations under this Contract, DOE/DVR shall be entitled to exercise any remedy available or provided under Florida law. All rights and remedies granted in this Contract to the DOE/DVR and available at law or equity shall be cumulative and not mutually exclusive.

representations, or Contracts, either verbal or written between the parties. If any terms or provisions of the Contract are found illegal or unenforceable, the remainder of the Contract shall remain in full force and effect and the terms of provisions shall be stricken.

E. Non-waiver of Defaults. Failure of DOE/DVR to declare any default immediately upon the occurrence thereof, or delay in taking any action in connection therewith, shall not waive such default. DOE/DVR shall have the right to declare any such default at any time and take such action as might be lawful or authorized hereunder, in law or in equity. No waiver of any term, provision, condition or covenant of this Contract by DOE/DVR shall be deemed to imply or constitute a further waiver by DOE/DVR of any other term, provision, condition or covenant of this Contract. No payment by DOE/DVR shall be deemed a waiver of any default hereunder.

F. Captions; Governing Law.

1. This Contract shall be governed by and construed in accordance with Florida law. Caption headings are inserted for convenience only and shall be ignored in interpreting the provisions of this Contract.
2. Venue for purposes of any action brought to enforce or construe the Contract shall lie in Leon County, Florida.

G. Mutual Drafting and Negotiation.

1. Both parties agree that, in the event of a dispute over this Contract, the provisions hereof shall be construed to give meaning to the intention of the parties.
2. The Contractor and DOE/DVR acknowledge that they have had their respective attorneys review and approve this Contract or that they have had the opportunity to do so.

H. All Terms and Conditions Included. This Contract and its attachments as referenced contain all the terms and conditions agreed upon by the parties. There are no provisions, terms, conditions, obligations other than those contained herein, and this Contract shall supersede all previous communications,

DISCLOSURE STATEMENT
State of Florida, Department of Education
Contract No. 15-110

Contractor represents and warrants as a material inducement to the State of Florida, Department of Education ("Department"), to enter the above referenced Contract that:

1. Neither Contractor, nor any officer, agent or employee of Contractor has now or ever has had any private business venture with the following individuals (hereinafter called "Agency Personnel"): Members of the State Board of Education, the Board of Governors, the Commissioner of Education, the Contract Manager named in the Contract, or the members of the Senior Management Service or Selected Exempt Service presently employed by Department or the State Board of Education; and

2. Neither Contractor, nor any officer, agent or employee of Contractor has given or offered to give money or anything else of value to any one or more of the Agency Personnel, or to any other person, in consideration for Contractor's selection as Contractor; and

3. Contractor knows of no fact or incidence of wrongdoing surrounding its selection as Contractor that, if disclosed to the Department would call into question Contractor's selection as Contractor or its fitness or ability to meet all of its legal and ethical obligations under the Contract.

Name of Contractor

Signature

(If Corporation, Partnership or D/B/A):

Title

Address

Phone/ Fax

Sworn to and subscribed before me this ____ day of _____, _____, by

_____, who is personally known to me or who produced

_____ for identification.

Signature of Notary Public

Name of Notary Public

My Commission expires:

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 10a

DATE OF SCHOOL BOARD MEETING: 24 June 2014

TITLE OF AGENDA ITEM: 2014 Fuel Bid for 2014-2015 School Year - Bid #1415-01

DIVISION: Transportation Department

 This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM: 2014-2015 Fuel Bid for #2 diesel fuel to the
Transportation Department

FUND SOURCE: Transportation Department

AMOUNT: \$800,000.00

PREPARED BY: Mr. Gerard A. Gay III

POSITION: Director of Transportation

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

 Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered _____

CHAIRMAN'S SIGNATURE: page(s) numbered _____

REVIEWED BY: _____

GADSDEN COUNTY SCHOOLS

Transportation Department

Transporting Gadsden County's Future

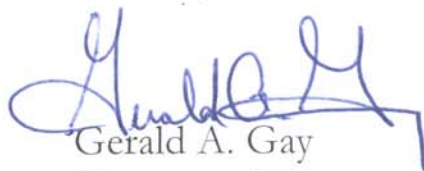
June 24, 2014

Mr. Reginald C. James
Superintendent of Schools
Gadsden District Schools
35 Martin Luther King Jr. Blvd
Quincy, Florida 32351

Dear Mr. James,

After reviewing the bids that were received for supplying #2 Ultra Low Sulfur Clear Diesel fuel to the Transportation Department for the 2014-2015 school year, we recommend that the contract be awarded to Mansfield Oil Company, 1025 Airport Parkway, S.W., Gainesville, Georgia 30501-0198.

Sincerely,



Gerald A. Gay
Director of Transportation
Gadsden County Schools



Gerald A. Gay, III
Director of Transportation
35 Martin Luther King, Jr. Blvd.
Quincy, FL 32351

PHONE (850) 627-6858
FAX (850) 875-8895
EMAIL gayg@gcpsmail.com
WEB SITE www.gcps.k12.fl.us



Mansfield Oil Co.
1025 Airport Parkway
Gainesville, GA 30501

BID PROPOSAL FORM

Under the conditions of this bid we agree to furnish #2 Ultra Low Sulfur Clear Diesel at the following mark-up per gallon:

#2 ULTRA LOW SULFUR CLEAR DIESEL \$+0.0061 /GALLON

Based on full transport deliveries of >=7,500 gallons

NOTE: All entries will be considered positive (+) unless they are clearly marked negative (-).

Further our company recommends using the PAD 1 report, O.P.I.S., for the **Bainbridge, Georgia** terminal. Baingridge, OPIS Contract Average Gross for Date of Delivery.

RENEWAL:

We agree to extend our prices on the same conditions for an additional year, upon mutual agreement of both parties.

YES X

NO _____

COMPANY Mansfield Oil Company of Gainesville, Inc

AUTHORIZED SIGNATURE 

NOTE: In the event you do not wish to bid, please submit a formal "NO BID" in order to ensure that you remain on the active bid list.

TALLY SHEETS FOR BIDS

BID NO: 1415-01

BID NAME: DIESEL FUEL BID 2014-15 SCHOOL YEAR

BID OPENING DATE: 5/22/14

BID OPENING TIME: 11:30 AM

PER GALLON

COMPANY SUBMITTING BID	MARKUP #2 DIESEL	TERMINAL	RENEWAL
* MANSFIELD OIL CO.	+ .0061	BAIN	YES
JIM HINTON OIL CO.	+ .0199	BAIN	YES
WARE OIL & SUPPLY CO	+ .39415	BAIN	YES
RKA PETROLEUM CO	+ .0126	BAIN	YES
PILOT TRAVEL CENTERS	+ .01	BAIN	YES
ELI ROBERTS & SONS	+ .029	BAIN	YES
PETROLEUM TRADERS	+ .0178	BAIN	YES
STARBER OIL CO	+ .04	BAIN	YES

PRESENT AT BID OPENING:

[Handwritten signatures]
 Bob [unclear]
 Gerald [unclear]
 Arthur [unclear]
 Sandra S. Gleaton

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 10b

DATE OF SCHOOL BOARD MEETING: June 24, 2014

TITLE OF AGENDA ITEM: Architect Contract – James A. Shanks School Clinic

DIVISION: Facilities

 This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM: For Board approval of proposal agreement from Joel Sampson (architect) for drawings and specifications on the renovations of school based health clinic building at James A. Shanks.

FUND SOURCE: HRSA grant

AMOUNT: *W.S.* \$17,800.00

PREPARED BY: Wayne Shepard

POSITION: Director of Facilities

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

 Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered _____

CHAIRMAN'S SIGNATURE: page(s) numbered _____

Be sure that the COMPTROLLER has signed the budget page.

This form is to be duplicated on light blue paper.

PROPOSAL/AGREEMENT



Client: Gadsden County School Board
35 M.L. King Blvd.
Quincy, Florida 32351
Contact: Wayne Shepard, Facilities Director

Date: June 13, 2014

Architect: Joel Sampson Architect, Inc.
212 N. Adams St.
Quincy, Florida 32351

Project: Renovation of School Based Health Clinic
Shanks Middle School
Quincy, Florida

Proposal No: 14-021

THE PROJECT

Brief Description of the Project.

The **Project** shall consist of renovations to the existing school based health center on the campus of Shanks Middle School in Quincy, Florida. The total floor area is approximately 2,650 square feet. The work shall include mostly repair of the existing facility. Additional items include, reroofing, repainting, wood rot repair, conversion of existing space to new dental exam room, new hvac system, new flooring, replacement of reception counter, accessible door hardware where required, new doors and windows to replace deteriorated. The concept and program shall coincide with the attached preliminary floor plan.

SCOPE OF WORK - BASIC SERVICES

The following services for, the **Project**, constitute the scope of work to be provided.

Phases

The work shall be accomplished and submitted in phases:

Phase	Document Submission	Portion of Fee
Construction Document Phase	- 100% Submission	70%
Bidding Phase	-	07%
Construction Administration Phase	-	23%

Construction Document Phase

Following comments from the Client related to the previously prepared schematic plan, bid ready documents based on the former plan shall be prepared including detailing all elements and components as required to construct the project. The services of a licensed professional engineer shall be retained by the Architect to design the new hvac system and the new dental exam room for plumbing, and electrical requirements. The architect shall coordinate with other parties to accomplish the work.

All work shall be accomplished in a timely manner so as to assist in the prompt execution of the overall project.

Bidding Phase

The Architect shall handle the bidding of the construction project through advertisement, distributing plan sets, interpreting the bidding documents to potential bidders, receiving bids and preparing contracts for construction.

Construction Phase

Construction Administration (on site observation of construction and coordination with contractor) shall be performed as approximately one site visit per week during the project and any necessary interpretation or clarification of drawings to the contractor.

Drawing Documents

All drawings will be CADD produced using DataCAD software. Digital drawing files will be provided to the Client in .dwg and .dxf format when requested. Drawing sheet size shall be 24"x36".

TOTAL FEE

The above listed services shall be provided to the Client at a cost Not To Exceed – Seventeen Thousand Eight Hundred (\$17,800.00). This fee excludes reimbursable expenses (see below.) A change in scope of work may cause a renegotiation of the fee.

Work Not Included in this proposal

1. Services for multiple bid packages or bidding of more than one package one time.

ADDITIONAL SERVICES

The following services shall be provided when authorized by the Client and they shall be paid for by the Client as herein stated under "Compensation for Additional Services."

1. Preparation of special submissions not listed above, which may be required for approval of governmental authorities, or any other entities having jurisdiction over the project.
2. Making revisions in drawings, specifications or other written documents when such revisions are inconsistent with written approvals or any instructions previously communicated by the Client. Also any such revisions which are due to causes beyond the control of the Architect.
3. Any other services or drawings not specifically listed herein under "Basic Services."

COMPENSATION FOR ADDITIONAL SERVICES

Architectural services shall be billed at a rate of	\$90.00 per hour
Intern Architect shall be billed at a rate of	\$50.00 per hour

REIMBURSABLE EXPENSES

The following items will be provided as required during the course of the work. Related expenses are shown:

1. Graphic or digital media shall be billed @ a rate of 1.1 x the actual cost.

BILLINGS/PAYMENTS

Invoices will be submitted on a monthly basis throughout the project and shall correspond closely with the percentages listed in the "Phases" section above. Invoices shall be considered past due if not paid within 30 days after the invoice date and the Architect may without waiving any claim or right of claim against the Client, and without liability whatsoever to the Client, terminate the performance of the service. A service charge will be charged at 1.5% per month on the unpaid balance. If the project is abandoned in whole or in part for more than six months the Architect's fee may be renegotiated if so desired by the Architect.

THE CLIENT'S RESPONSIBILITY

The Architect will not be responsible for errors or omissions resulting from inaccuracy of reports, surveys, building or zoning codes provided by the Client.

TERMINATION OF AGREEMENT

This agreement may be terminated upon seven days written notice by either party should the other fail to perform his obligations hereunder. In the event of termination, the Client shall pay the Architect for all services rendered to the date of termination and all reimbursable expenses.

This Agreement shall be considered executed the day and year of the Client signature below. If not executed within 60 days of the date on the first page of this document, then the Architect reserves the right to withdraw this proposal/agreement.

Offered by Architect

Accepted by Client


signature

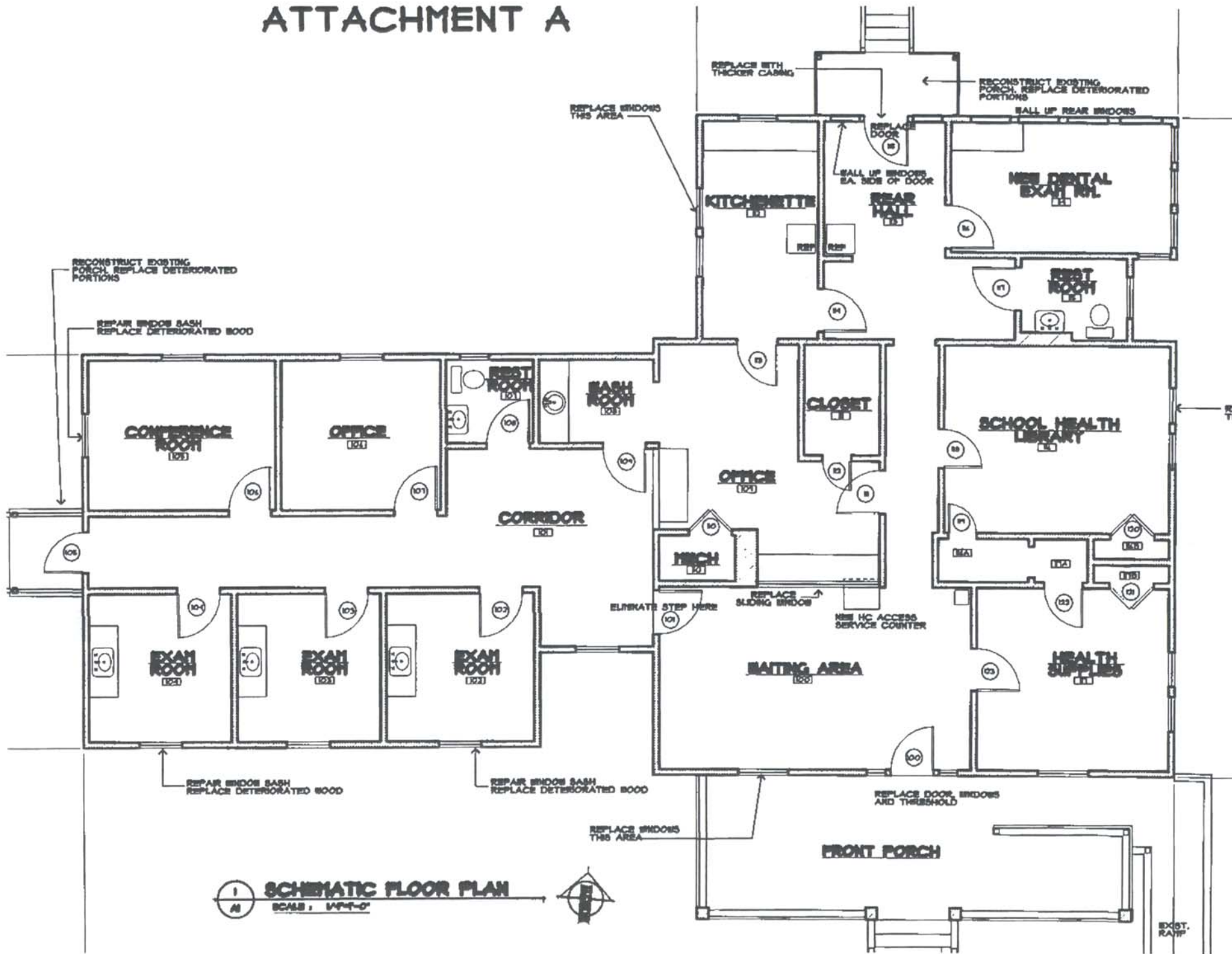
signature date

Joel D. Sampson, President
printed name/title

printed name/title

for

ATTACHMENT A



SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 10c

DATE OF SCHOOL BOARD MEETING: June 24, 2014

TITLE OF AGENDA ITEM: Architect Proposal – George Munroe Elementary Modular Health Building.

DIVISION: Facilities

 This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM: For Board approval of proposal agreement from Joel Sampson (architect) for drawings and specifications for a modular health unit to be installed at George Munroe Elementary School.

FUND SOURCE: HRSA grant

AMOUNT: \$9,095.00

PREPARED BY: *W-S* Wayne Shepard

POSITION: Director of Facilities

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

 Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered _____

CHAIRMAN'S SIGNATURE: page(s) numbered _____

Be sure that the COMPTROLLER has signed the budget page.

PROPOSAL/AGREEMENT



Client: Gadsden County School Board
35 M.L. King Blvd.
Quincy, Florida 32351

Contact: Wayne Shepard, Facilities Director

Date: June 13, 2014

Project: School Based Health Clinic - Modular
George Munroe Elementary School
Quincy, Florida

Architect: Joel Sampson Architect, Inc.
212 N. Adams St.
Quincy, Florida 32351

Proposal No: 14-019

THE PROJECT

Brief Description of the Project.

The **Project** shall consist of a modular building at George Munroe Elementary School in Quincy, Florida that will serve as the school based health center. The total floor area is 1,680 square feet. The concept and program shall coincide with the attached preliminary floor plan which included waiting area, nurses station, lab, office, exam rooms, dental services room, break room, restrooms and support areas. See Attachment "A".

SCOPE OF WORK - BASIC SERVICES

The following services for, the **Project**, constitute the scope of work to be provided.

Phases

The work shall be accomplished and submitted in phases:

Phase	Document Submission	Portion of Fee
Construction Document Phase	- 100% Submission	70%
Bidding Phase	-	07%
Construction Administration Phase	-	23%

Construction Document Phase

Following comments from the Client related to the previously prepared schematic plan, bid ready documents based on the former plan shall be prepared including detailing all elements and components as required to construct the project. The services of a licensed structural engineer shall be retained by the Architect to design all foundation and anchorages. The architect shall coordinate with other parties to accomplish the work. All work shall be accomplished in a timely manner so as to assist in the prompt execution of the overall project.

Bidding Phase

The Architect shall handle the bidding of the construction project through advertisement, distributing plan sets, interpreting the bidding documents to potential bidders, receiving bids and preparing contracts for construction.

Construction Phase

Construction Administration (on site observation of construction and coordination with contractor) shall be performed as approximately one site visit per week during the project and any necessary interpretation or clarification of drawings to the contractor. Architect shall review pay requests for the owner and perform substantial and final inspections and coordinate with the contractor.

Drawing Documents

All drawings will be CADD produced using DataCAD software. Digital drawing files will be provided to the Client in .dwg and .dxf format when requested. Drawing sheet size shall be 24"x36".

TOTAL FEE

The above listed services shall be provided to the Client at a cost Not To Exceed - Nine Thousand Ninety Five (\$9,095.00). This fee excludes reimbursable expenses (see below.) A change in scope of work may cause a renegotiation of the fee.

Work Not Included in this proposal

- 1. Services for multiple bid packages or bidding of more than one package one time.

ADDITIONAL SERVICES

The following services shall be provided when authorized by the Client and they shall be paid for by the Client as herein stated under "Compensation for Additional Services."

- 1. Preparation of special submissions not listed above, which may be required for approval of governmental authorities, or any other entities having jurisdiction over the project.
- 2. Making revisions in drawings, specifications or other written documents when such revisions are inconsistent with written approvals or any instructions previously communicated by the Client. Also any such revisions which are due to causes beyond the control of the Architect.
- 3. Any other services or drawings not specifically listed herein under "Basic Services."

COMPENSATION FOR ADDITIONAL SERVICES

Architectural services shall be billed at a rate of \$90.00 per hour
Intern Architect shall be billed at a rate of \$50.00 per hour

REIMBURSABLE EXPENSES

The following items will be provided as required during the course of the work. Related expenses are shown:

- 1. Graphic or digital media shall be billed @ a rate of 1.1 x the actual cost.

BILLINGS/PAYMENTS

Invoices will be submitted on a monthly basis throughout the project and shall correspond closely with the percentages listed in the "Phases" section above. Invoices shall be considered past due if not paid within 30 days after the invoice date and the Architect may without waiving any claim or right of claim against the Client, and without liability whatsoever to the Client, terminate the performance of the service. A service charge will be charged at 1.5% per month on the unpaid balance. If the project is abandoned in whole or in part for more than six months the Architect's fee may be renegotiated if so desired by the Architect.

THE CLIENT'S RESPONSIBILITY

The Architect will not be responsible for errors or omissions resulting from inaccuracy of reports, surveys, building or zoning codes provided by the Client.

TERMINATION OF AGREEMENT

This agreement may be terminated upon seven days written notice by either party should the other fail to perform his obligations hereunder. In the event of termination, the Client shall pay the Architect for all services rendered to the date of termination and all reimbursable expenses.

This Agreement shall be considered executed the day and year of the Client signature below. If not executed within 60 days of the date on the first page of this document, then the Architect reserves the right to withdraw this proposal/agreement.

Offered by Architect

Accepted by Client


signature

signature date

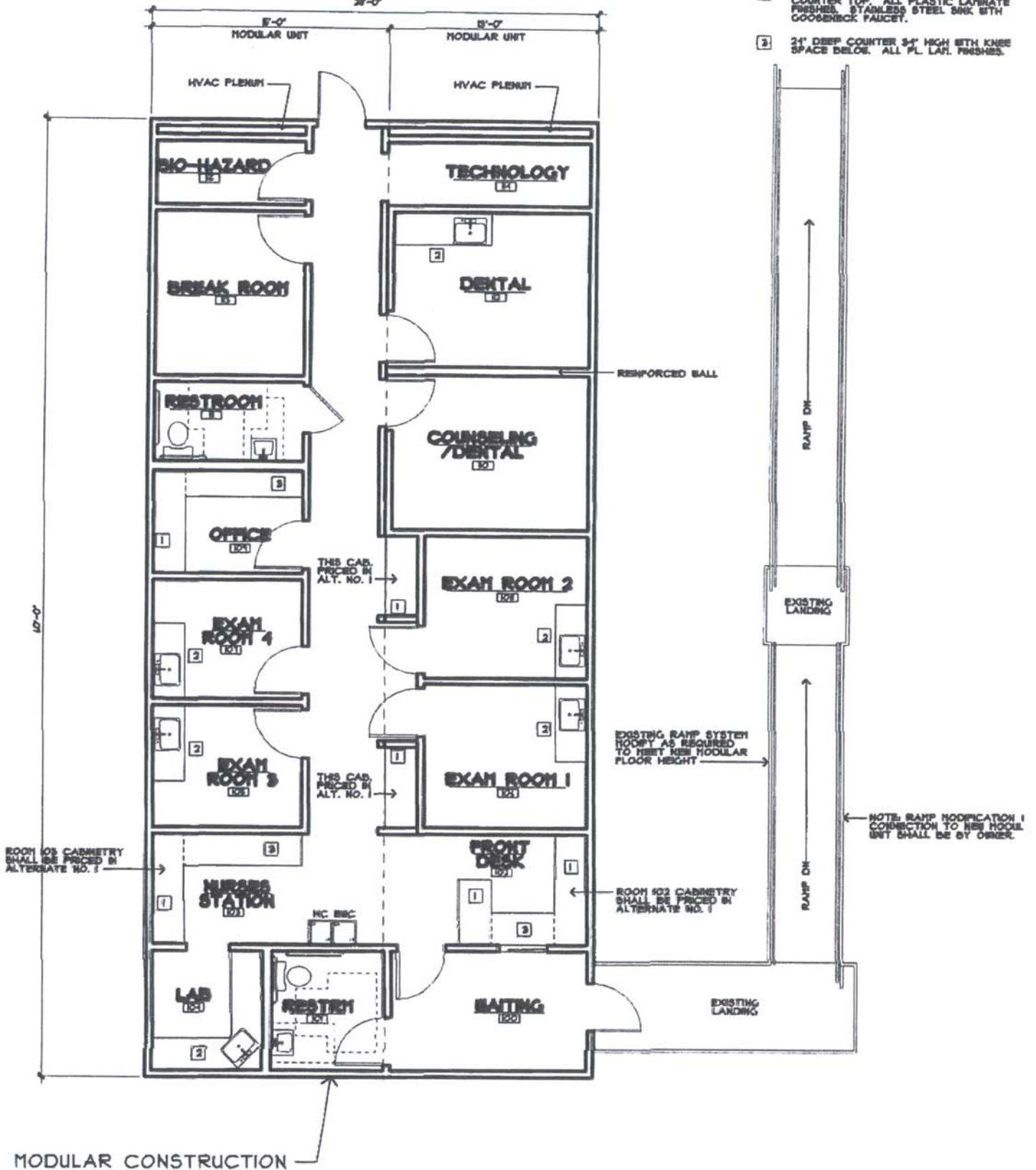
Joel D. Sampson, President
printed name/title

printed name/title

for

ATTACHMENT A

- 1 24" DEEP BASE CABINET WITH 34" HIGH COUNTER TOP. ALL PLASTIC LAMINATE FINISHES.
- 2 24" DEEP BASE CABINET WITH 34" HIGH COUNTER TOP. ALL PLASTIC LAMINATE FINISHES. STAINLESS STEEL SINK WITH GOOSENECK FAUCET.
- 3 24" DEEP COUNTER 34" HIGH WITH KNEE SPACE BELOW. ALL PL. LAM. FINISHES.



1 SCHEMATIC FLOOR PLAN
 2 SCALE: 1/4"=1'-0"
 NORTH

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 10d

DATE OF SCHOOL BOARD MEETING: June 24, 2014

TITLE OF AGENDA ITEM: Architect Proposal – Havana Middle School Modular Health Building.

DIVISION: Facilities

 This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM: For Board approval of proposal agreement from Joel Sampson (architect) for drawings and specifications for a modular health unit to be installed at Havana Middle School.

FUND SOURCE: HRSA grant

AMOUNT: \$9,095.00

PREPARED BY: *W.S.* Wayne Shepard

POSITION: Director of Facilities

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

 Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered _____

CHAIRMAN'S SIGNATURE: page(s) numbered _____

Be sure that the COMPTROLLER has signed the budget page.

PROPOSAL/AGREEMENT



Client: Gadsden County School Board
35 M.L. King Blvd.
Quincy, Florida 32351
Contact: Wayne Shepard, Facilities Director

Date: June 13, 2014
Project: School Based Health Clinic - Modular
Havana Middle School
Quincy, Florida

Architect: Joel Sampson Architect, Inc.
212 N. Adams St.
Quincy, Florida 32351

Proposal No: 14-020

THE PROJECT

Brief Description of the Project.

The Project shall consist of a modular building at Havana Middle School that will serve as the school based health center. The total floor area is 1,680 square feet. The concept and program shall coincide with the attached preliminary floor plan which included waiting area, nurses station, lab, office, exam rooms, dental services room, break room, restrooms and support areas. See Attachment "A".

SCOPE OF WORK - BASIC SERVICES

The following services for, the Project, constitute the scope of work to be provided.

Phases

The work shall be accomplished and submitted in phases:

Phase	Document Submission	Portion of Fee
Construction Document Phase	- 100% Submission	70%
Bidding Phase	-	07%
Construction Administration Phase	-	23%

Construction Document Phase

Following comments from the Client related to the previously prepared schematic plan, bid ready documents based on the former plan shall be prepared including detailing all elements and components as required to construct the project. The services of a licensed structural engineer shall be retained by the Architect to design all foundation and anchorages. The architect shall coordinate with other parties to accomplish the work. All work shall be accomplished in a timely manner so as to assist in the prompt execution of the overall project.

Bidding Phase

The Architect shall handle the bidding of the construction project through advertisement, distributing plan sets, interpreting the bidding documents to potential bidders, receiving bids and preparing contracts for construction.

Construction Phase

Construction Administration (on site observation of construction and coordination with contractor) shall be performed as approximately one site visit per week during the project and any necessary interpretation or clarification of drawings to the contractor. Architect shall review pay requests for the owner and perform substantial and final inspections and coordinate with the contractor.

Drawing Documents

All drawings will be CADD produced using DataCAD software. Digital drawing files will be provided to the Client in .dwg and .dxf format when requested. Drawing sheet size shall be 24"x36".

TOTAL FEE

The above listed services shall be provided to the Client at a cost Not To Exceed - Nine Thousand Ninety Five (\$9,095.00). This fee excludes reimbursable expenses (see below.) A change in scope of work may cause a renegotiation of the fee.

Work Not Included in this proposal

- 1. Services for multiple bid packages or bidding of more than one package one time.

ADDITIONAL SERVICES

The following services shall be provided when authorized by the Client and they shall be paid for by the Client as herein stated under "Compensation for Additional Services."

- 1. Preparation of special submissions not listed above, which may be required for approval of governmental authorities, or any other entities having jurisdiction over the project.
- 2. Making revisions in drawings, specifications or other written documents when such revisions are inconsistent with written approvals or any instructions previously communicated by the Client. Also any such revisions which are due to causes beyond the control of the Architect.
- 3. Any other services or drawings not specifically listed herein under "Basic Services."

COMPENSATION FOR ADDITIONAL SERVICES

Architectural services shall be billed at a rate of	\$90.00 per hour
Intern Architect shall be billed at a rate of	\$50.00 per hour

REIMBURSABLE EXPENSES

The following items will be provided as required during the course of the work. Related expenses are shown:

- 1. Graphic or digital media shall be billed @ a rate of 1.1 x the actual cost.

BILLINGS/PAYMENTS

Invoices will be submitted on a monthly basis throughout the project and shall correspond closely with the percentages listed in the "Phases" section above. Invoices shall be considered past due if not paid within 30 days after the invoice date and the Architect may without waiving any claim or right of claim against the Client, and without liability whatsoever to the Client, terminate the performance of the service. A service charge will be charged at 1.5% per month on the unpaid balance. If the project is abandoned in whole or in part for more than six months the Architect's fee may be renegotiated if so desired by the Architect.

THE CLIENT'S RESPONSIBILITY

The Architect will not be responsible for errors or omissions resulting from inaccuracy of reports, surveys, building or zoning codes provided by the Client.

TERMINATION OF AGREEMENT

This agreement may be terminated upon seven days written notice by either party should the other fail to perform his obligations hereunder. In the event of termination, the Client shall pay the Architect for all services rendered to the date of termination and all reimbursable expenses.

This Agreement shall be considered executed the day and year of the Client signature below. If not executed within 60 days of the date on the first page of this document, then the Architect reserves the right to withdraw this proposal/agreement.

Offered by Architect


signature

Joel D. Sampson, President
printed name/title

Accepted by Client

signature date

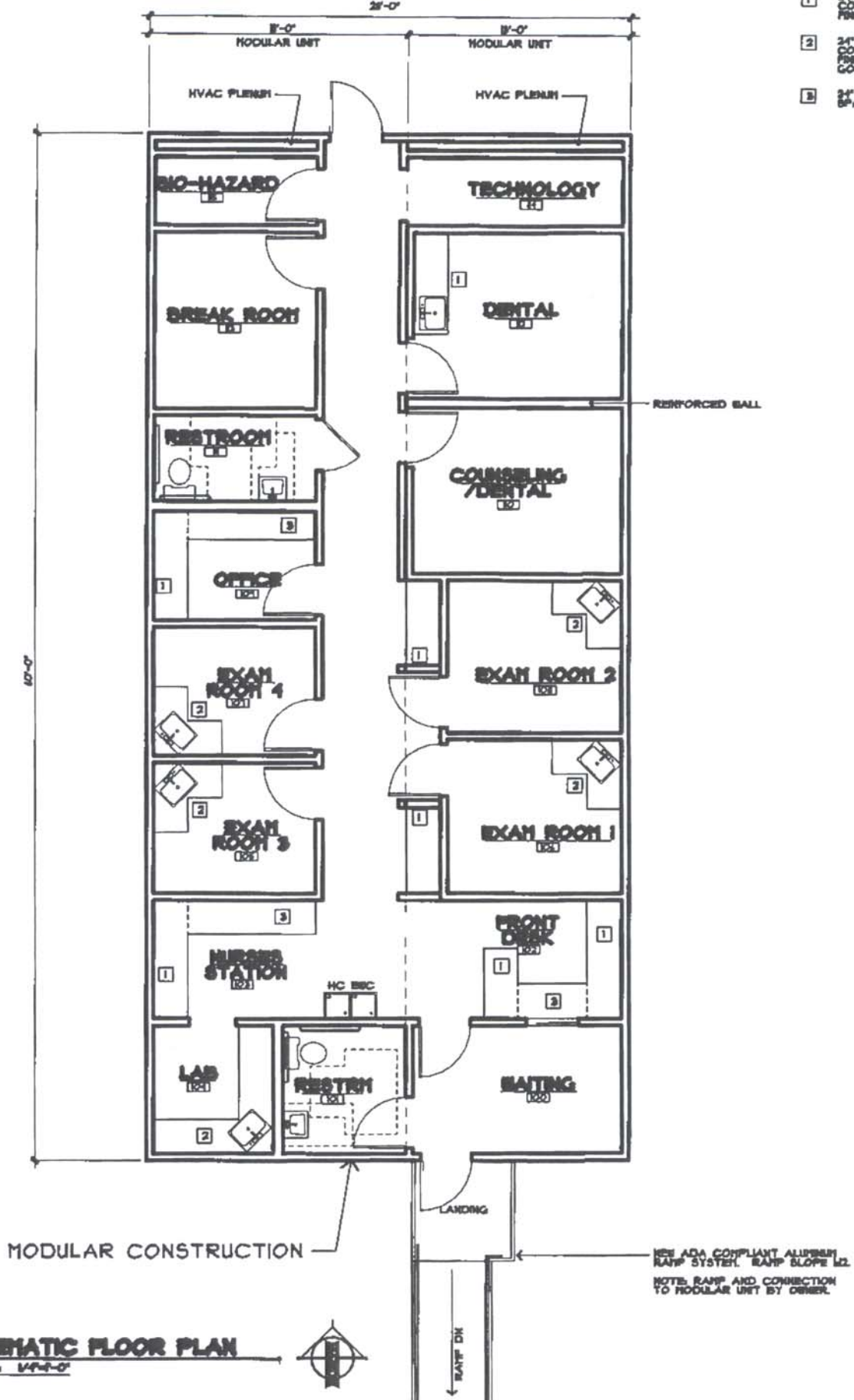
printed name/title

for

ATTACHMENT A

CONSTRUCTION

- 1 24" DEEP BASE CABINET COUNTER TOP, ALL PL. FINISHED.
- 2 24" DEEP BASE CABINET COUNTER TOP, ALL PL. FINISHED, STAINLESS STE GOOSENECK FAUCET.
- 3 24" DEEP COUNTER 34" H SPACE BELOW, ALL PL. I



1
A1

SCHEMATIC FLOOR PLAN
SCALE: 1/4"=1'-0"



SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 10e

DATE OF SCHOOL BOARD MEETING: June 24, 2014

TITLE OF AGENDA ITEM: Full Service HVAC/Refrigeration Maintenance & Repair contract for East Gadsden High School.

DIVISION: Facilities

 This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM: For Board approval of *Bid #1415-03 Full Service HVAC/Refrigeration Maintenance & Repair.* Contract will include all maintenance parts and labor. Best and lowest bid was received from Brooks Air Systems.

FUND SOURCE: 110

AMOUNT: \$76,924.00

PREPARED BY: *W.S.* Wayne Shepard

POSITION: Director of Facilities

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

 Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered

CHAIRMAN'S SIGNATURE: page(s) numbered

Be sure that the COMPTROLLER has signed the budget page.

This form is to be duplicated on light blue paper.

The School Board of Gadsden County in Quincy, Florida is soliciting a (sealed) Request for Proposal (RFP) for:

FULL SERVICE HVAC/REFRIGERATION MAINTENANCE & REPAIR CONTRACT

East Gadsden High School

27001 Blue Star Hwy.

Havana, Florida 32333

Proposal opening date: May 14, 2014

2:00 pm EST

Please review and submit your formal proposal by the date and time shown above

Sealed RFP #14-15-03

Full Service HVAC/Refrigeration Maintenance & Repair Contract

East Gadsden High School

Wayne Shepard, Director of Facilities

School Board of Gadsden County

35 Martin Luther King Jr. Blvd.

Quincy, Florida 32351

Please **boldly** indicate the RFP title and number on the outside of your sealed RFP envelope to assist the School Board internally in identifying your RFP. EMAIL/FAX Submissions Not Allowed.

All prices are to be FOB destination, freight prepaid. The School Board of Gadsden County is exempt from all state and Federal taxes.

RFP Non-Mandatory Pre-Proposal Conference including site visit: May 5, 2014 @ 10:00 am EST at
East Gadsden High School
27001 Blue Star Hwy.
Havana, FL 32333

"CERTIFICATE OF INDEPENDENT PRICE DETERMINATION"

IMPORTANT!! SIGNATURE BLOCK

I certify that this proposal is made without prior understanding, agreement, or connection with any other proposer or competitor relating to the prices contained herein, the intention to submit a proposal or the methods or factors used to calculate the prices offered. The prices contained herein have in all respects been independently determined and are prices that are fair and without collusion or fraud. I agree to abide by all conditions of this RFP and certify that I am authorized to sign this RFP for the company submitting it

Company name

Officer's Authorized Signature

Officer's Typed Name & Title

TO BE RESPONSIVE, SIGNATURE OF OFFICER AUTHORIZED TO BIND THE COMPANY SUBMITTING THIS RFP IS REQUIRED.

The School Board of Gadsden County reserves the right to award any portion(s) of the RFP, to reject all proposals, to re-solicit RFP/proposals or not and to waive informalities as deemed in the best interest of the School Board.

RFP 14-15-03 FULL SERVICE HVAC/REFRIGERATION MAINTENANCE & REPAIR

Gadsden County Schools
 Full Service HVAC Maintenance and Repair Contract@ EGHS RFP# 14-15-03
 Bid Opening Date May 14, 2014, 2:00 p.m. EST

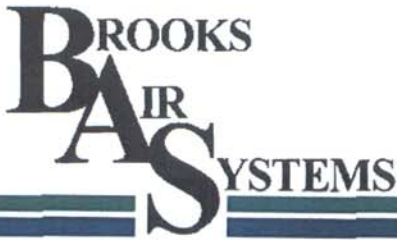


Company Name	Bid Price	Printed Name	Signature
Keith Lawson Company		No Bid	
Brooks Air Systems	\$76,924.00	Chuck Prerson	<i>CLW</i>
Engineered Cooling Systems, Inc.	\$85,201.00		
Trane		No Bid	
Prime Vendor		No Bid	
Honeywell, Inc.		No Bid	
Quality Mechanical Solutions, Inc.		No Bid	
Hodges Heating & Air Conditioning		No Bid	

Mary Tutter 5/14/14
 Signature Date

Shirley A. Alday 5/14/14
 Signature Date

Mary Tutter 5/14/14



Commercial HVAC Equipment, Controls, Service, Electrical & Parts

Proposal

Date: June 16, 2014
To: Wayne Shepard - Gadsden County Schools
Project: East Gadsden High School RFP 14-15-03

Per our discussions in reference to section 6.00 of the above mentioned RFP, the following is submitted as a possible value deletion and contract modification.

- Remove comprehensive refrigeration parts and labor Deduction (\$9,000.00)
Remove from the comprehensive chiller maintenance, compressors only, leaving the rest of the chillers under the comprehensive parts and labor contract. Deduction (\$12,000.00)

Total Deductions: (\$21,000.00)

BROOKS AIR SYSTEMS, INC.

Accepted By:

Date:

P. O. Number:

Tom Zimmerly
Sales Engineer

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 10f

DATE OF SCHOOL BOARD MEETING: June 24, 2014

TITLE OF AGENDA ITEM: Full Service HVAC/Refrigeration Maintenance & Repair contract for West Gadsden High School.

DIVISION: Facilities

 This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM: For Board approval of Bid #1415-02 Full Service HVAC/Refrigeration Maintenance & Repair. Contract will include all maintenance parts and labor. Best and lowest bid was received from Brooks Air Systems.

FUND SOURCE: 110

AMOUNT: \$59,756.00

PREPARED BY: *W.S.* Wayne Shepard

POSITION: Director of Facilities

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

 Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered _____

CHAIRMAN'S SIGNATURE: page(s) numbered _____

Be sure that the COMPTROLLER has signed the budget page.

This form is to be duplicated on light blue paper.

The School Board of Gadsden County in Quincy, Florida is soliciting a (sealed) Request for Proposal (RFP) for:

FULL SERVICE HVAC/REFRIGERATION MAINTENANCE & REPAIR CONTRACT

**West Gadsden High School
200 Providence Road
Quincy, Florida 32351
Proposal opening date: May 14, 2014
2:00 pm EST**

Please review and submit your formal proposal by the date and time shown above

**Sealed RFP #14-15-02
Full Service HVAC/Refrigeration Maintenance & Repair Contract
West Gadsden High School
Wayne Shepard, Director of Facilities
School Board of Gadsden County
35 Martin Luther King Jr. Blvd.
Quincy, Florida 32351**

Please boldly indicate the RFP title and number on the outside of your sealed RFP envelope to assist the School Board internally in identifying your RFP. EMAIL/FAX Submissions Not Allowed.

All prices are to be FOB destination, freight prepaid. The School Board of Gadsden County is exempt from all state and Federal taxes.

RFP Non-Mandatory Pre-Proposal Conference including site visit: May 5, 2014 @ 1:00 pm EST at
West Gadsden High School
200 Providence Road
Quincy, Florida 32351

**"CERTIFICATE OF INDEPENDENT PRICE DETERMINATION"
IMPORTANT!! SIGNATURE BLOCK**

I certify that this proposal is made without prior understanding, agreement, or connection with any other proposer or competitor relating to the prices contained herein, the intention to submit a proposal or the methods or factors used to calculate the prices offered. The prices contained herein have in all respects been independently determined and are prices that are fair and without collusion or fraud. I agree to abide by all conditions of this RFP and certify that I am authorized to sign this RFP for the company submitting it

Brooks Air Systems
Company name

H. Neff Jenkins
Officer's Authorized Signature

H. NEFF JENKINS - PRESIDENT
Officer's Typed Name & Title

TO BE RESPONSIVE, SIGNATURE OF OFFICER AUTHORIZED TO BIND THE COMPANY SUBMITTING THIS RFP IS REQUIRED.

The School Board of Gadsden County reserves the right to award any portion(s) of the RFP, to reject all proposals, to re-solicit RFP/proposals or not and to waive informalities as deemed in the best interest of the School Board.

RFP 14-15-02 FULL SERVICE HVAC/REFRIGERATION MAINTENANCE & REPAIR

Gadsden County Schools
 Full Service HVAC Maintenance and Repair Contract@ WGHS RFP# 14-15-02
 Bid Opening Date May 14, 2014, 2:00 p.m. EST



Company Name	Bid Price	Printed Name	Signature
Keith Lawson Company		No Bid	
Brooks Air Systems	\$ 59,756.00	Chuck Pierson	<i>Chuck Pierson</i>
Engineered Cooling Systems, Inc.	\$ 68,141.00		
Trane		No Bid	
Prime Vendor		No Bid	
Honeywell, Inc.		No Bid	
Quality Mechanical Solutions, Inc.		No Bid	
Hodges Heating & Air Conditioning		No Bid	

Wayne Reed
 Signature

5/14/14
 Date

Shirley Alday
[Signature]

Mary [Signature]
 Signature

5/14/14
 Date



Commercial HVAC Equipment, Controls, Service, Electrical & Parts

Proposal

Date: June 16, 2014
To: Wayne Shepard - Gadsden County Schools
Project: West Gadsden High School RFP 14-15-02

Per our discussions in reference to section 6.00 of the above mentioned RFP, the following is submitted as a possible value deletion and contract modification.

- Remove comprehensive refrigeration parts and labor Deduction (\$6,000.00)
Remove from the comprehensive chiller maintenance, compressors only, leaving the rest of the chillers under the comprehensive parts and labor contract. Deduction (\$8,000.00)

Total Deductions: (\$14,000.00)

BROOKS AIR SYSTEMS, INC.

Accepted By:

Date:

P. O. Number:

Tom Zimmerly
Sales Engineer

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 10g

DATE OF SCHOOL BOARD MEETING: June 24, 2014

TITLE OF AGENDA ITEM: Continuation of bid #1213-19 Grounds Maintenance Group #5

DIVISION: Facilities

 This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM: For Board approval to continue grounds maintenance services at West Gadsden High and Greensboro Elementary. Original bid award was to Evans Sure Cut Landscaping. Bid allows an additional one year extension. This is a ten month contract. Excludes the months of January and February.

FUND SOURCE: 110

AMOUNT: \$18,400.00

PREPARED BY: *W.S.* Wayne Shepard

POSITION: Director of Facilities

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

 Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered _____

CHAIRMAN'S SIGNATURE: page(s) numbered _____

Be sure that the COMPTROLLER has signed the budget page.

This form is to be duplicated on light blue paper.

The School Board of Gadsden County



"Building A Brighter Future"

Reginald C. James
SUPERINTENDENT
OF SCHOOLS

35 MARTIN LUTHER KING, JR. BLVD.
QUINCY, FLORIDA 32351
TEL: (850) 627-9651
FAX: (850) 627-2780
www.gcps.k12.fl.us

Evans Sure Cut Landscaping
John Evans
P.O. Box 696
Havana, FL 32333

Dear Mr. Evans

In preparation for the upcoming fiscal year we are contacting you in reference to bid #1213-19, Grounds Maintenance

As per page 2, item C of the ITB, we would like to extend this agreement through the 2014-2015 fiscal year.

[Handwritten Signature] I agree to extend our services at the same price and schedule as the original agreement starting July 1, 2014 through June 30, 2015.

I do not wish to extend this agreement past June 30, 2014.

Please indicate your response and return to my office no later than May 22, 2014

[Handwritten Signature] _____ *5/21/14*
Signature Date

Group #5 West Gadsden High (400.00 per service), Greensboro Elementary (400.00 per service). Excludes the months of January and February.

Please review the specifications and terms of your original agreement and provide to the School Board Maintenance Department updated forms and exemptions (i.e. proof of insurance, exemption from workman's compensation coverage).

Sincerely,

Wayne Shepard
Wayne Shepard – Director of Facilities

Audrey Lewis
DISTRICT NO. 1
HAVANA, FL 32333

Judge B. Helms, Jr.
DISTRICT NO. 2
QUINCY, FL 32351
HAVANA, FL 32333

ISAAC SIMMONS, JR.
DISTRICT NO. 3
CHATTACHOOCHEE, FL 32324
GREENSBORO, FL 32330

Charlie D. Frost
DISTRICT NO. 4
GREENSBORO, FL 32330
QUINCY, FL 32352

ROGER P. MILTON
DISTRICT NO. 5
QUINCY, FL 32351

BOARD MEETS FOURTH TUESDAY OF EACH MONTH
EQUAL OPPORTUNITY EMPLOYER

I. INTRODUCTION & GENERAL INFORMATION

The purpose and intent of this Invitation to Bid is to identify qualified vendors and secure firm pricing for the mowing and grounds maintenance of the various holding ponds and school campuses throughout the Gadsden County School District (the District) as specified herein.

II. GENERAL TERMS AND CONDITIONS

NOTE: The term "Bidder" as used within this Invitation to Bid (ITB) refers to the person, company or organization responding to this ITB. The Bidder is responsible for understanding and complying with the terms and conditions herein.

- A. **GENERAL:** Upon a Bid award, the terms and conditions of this Bid or any portion thereof, may, upon mutual agreement of the parties be extended for one additional term(s) or for additional quantities (all original terms and conditions will remain in effect). Subject to the mutual consent of the parties, the pricing, terms and conditions of this Bid, for the products or services specified herein, may be extended to other municipal, city or county government agencies, school boards, community or junior colleges, or state universities within the State of Florida.
- B. **AWARD:** In the event of contract award, this contract shall be awarded to the responsible and Responsive Bidder(s) whose bid is determined to be the most advantageous to the District, taking into consideration price and other requirements as set forth in the ITB. It is anticipated that this contract award will be made to multiple vendors on an all-or-none or by group basis. Any bidder who is awarded the contract must maintain the same prices as originally bid for the duration of the term of the contract and any subsequent renewal periods. Within one week after receipt of notification of award, successful bidder(s) shall meet with the Facilities Maintenance Supervisor to discuss job procedures and scheduling.

It is anticipated that a recommendation for award will be presented to the School Board for consideration at its regularly scheduled meeting, June 25, 2013.

- C. **TERM:** The initial term of this contract will be from date of School Board approval, on or about July 1, 2013 through June 30, 2014, and may, by mutual agreement between the School Board of Gadsden County, Florida and the awardee(s), upon final School Board approval, be extended an additional one (1) year period and, if needed, ninety (90) days beyond the expiration date of the current contract period. All prices shall be firm for the term of the contract. The successful bidder(s) agree to this condition by signing its bid.
- D. **BID OPENING AND FORM:** Bid openings will be public on the date and time specified on the Bidder's Acknowledgement form. All Bids received after the time indicated will be rejected as non-responsive and returned unopened to sender. Bids by Email, fax, telegram, or verbally by telephone or in person will not be accepted. (To protect any confidential information contained in their Bid, companies must invoke the exemptions to disclosure provided by law in response to the ITB, and must identify the data and other material to be protected, and must state the reasons why such exclusion from public disclosure is necessary).
- E. **BIDDER'S RESPONSIBILITY:** Before submitting their bid, each Bidder is required to carefully examine the ITB specifications and to completely familiarize themselves with all of the terms and conditions that are contained within this request. Ignorance on the part of the bidder will in no way relieve them of any of the obligations and responsibilities which are a part of this ITB.
- F. **OCCUPATIONAL LICENSE:** Vendors submitting a Bid shall meet the Local Occupational License Tax requirements. Vendors with a location outside Gadsden County shall meet local Occupational Tax requirements. It is the vendor's responsibility to resubmit a copy of a new license after expiration or termination of the current license.

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 10h

DATE OF SCHOOL BOARD MEETING: June 24, 2014

TITLE OF AGENDA ITEM: Continuation of agreement with McCall Service for pest control.

DIVISION: Facilities

 This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM: For Board approval to continue services. Gadsden County School District will piggyback Leon County Schools Bid Award #5084-2013 – Pest Control Services District Wide with no price increase for 2014-2015.

FUND SOURCE: 110

AMOUNT: *W.S.* \$22,000.00

PREPARED BY: Wayne Shepard

POSITION: Director of Facilities

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

 Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered _____

CHAIRMAN'S SIGNATURE: page(s) numbered _____

Be sure that the COMPTROLLER has signed the budget page.

This form is to be duplicated on light blue paper.



May 22, 2014

Mary Rutton
Gadsden County Schools
35 Martin Luther Blvd.
Quincy, Fl. 32351

Dear Mrs. Rutton,

Thank you for the opportunity to provide pest control for Gadsden County Schools. Per our conversation, here is the copy of approval letter from Leon County Schools. McCall Service Inc. is providing the same service & cost per service for Gadsden County Schools, and will continue to do so throughout the length of the agreement. We expect to renew for the two additional years, for the same terms.

Thank you again for the opportunity to provide service for Gadsden County Schools. We appreciate your business; should you or Mr. Shepard have any questions, please contact me at (850) 345-2993 with any questions.

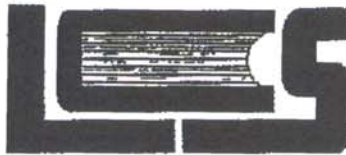
Sincerely,

Tim Schroeder
Manager/Associate Certified Entomologist
McCall Service Inc.

410 Paul Russell Rd. / Tallahassee, FL 32301
TELEPHONE (850) 877-7143
www.mccallservice.com

Board Chair
Forrest Van Camp

LEON COUNTY SCHOOLS



Board Members
Dee Crumpler
Dee Dee Rasmussen
Georgia "Joy" Bowen

Board Vice Chair
Maggie B. Lewis-Butler

Superintendent
Jackie Pons

April 1, 2014

McCall Service, Inc.
Tim Schroeder, Manager
410 Paul Russell Road
Tallahassee, FL 32301

Dear Mr. Schroeder:

The School Board of Leon County, Florida at its June 8, 2012 meeting awarded Bid No 5084-2012 Pest Control Services District Wide to McCall Service, Inc.

The bid specifications state that the contract may be renewed annually, not to exceed three years, if both parties agree to the renewal. The bid prices and conditions must remain the same.

Please advise no later than April 21, 2014 if you wish to renew the contract for another year beginning July 1, 2014 through June 30, 2015. Your reply may be faxed to (850) 488-3807 or sent via email to scottn@leonschools.net.

Sincerely,


Nancy Scott
Purchasing Agent II

RENEWAL AGREEMENT

We agree to renew the above contract, same conditions and requirements for 2014-2015.

Yes: No:

McCall Service

Company

410 E. Paul Russell

Street/Box

Tallahassee FL 32301

City/State/Zip Code

 Manager

Signature/Title

4-3-14

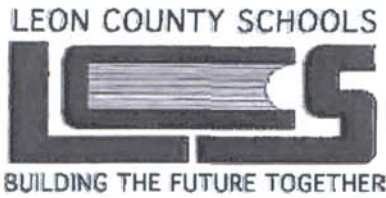
Date

June Kail, Director of Purchasing

3397 West Tharpe Street · Tallahassee, Florida 32303 · Phone (850) 488-1206 · Fax (850) 488-3807 · www.leonschools.net

"The Leon County School District does not discriminate against any person on the basis of gender, marital status, sexual orientation, race, religion, national origin, age, color or disability."

Building the Future Together



THE LEON COUNTY SCHOOL DISTRICT
PURCHASING DEPARTMENT
 3397 WEST THARPE ST.
 TALLAHASSEE, FLORIDA 32303

INVITATION TO BID (ITB) & BIDDER'S ACKNOWLEDGEMENT

POSTING DATE:
March 29, 2012

PURCHASING CONTACT:
Nancy Scott – 488-1206
scotttn@leonschools.net

BID TITLE:
Pest Control Services District Wide

BID NUMBER:
5084-2013

BID OPENING DATE & TIME:

April 24, 2012 @ 2:00 P.M. EST

NOTE: BIDS RECEIVED AFTER THE OPENING DATE AND TIME WILL NOT BE ACCEPTED.

The School District of Leon County, Florida, solicits your company to submit a bid on the above referenced goods or services. All terms, specifications and conditions set forth in this request are incorporated by this reference into your response. Bids will not be accepted unless all conditions have been met. In the event of a conflict between the General Bid Terms and Conditions and any Special terms and Conditions attached hereto, the Special Terms and Conditions shall have precedence. All bids must have an authorized signature in the space provided below. All bids must be sealed and received in the School District's Purchasing Office at 3397 West Tharpe St., Tallahassee, Florida, by the "Bid Opening Date & Time" referenced above. All envelopes containing sealed bids must reference the "Bid Title", "Bid Number" and the "Bid Opening Date & Time". The School District is not responsible for lost or late delivery of Bids by the U.S. Postal Service or other delivery services used by the Bidder. Bids may not be withdrawn for a period of sixty (60) days after the bid opening unless otherwise specified.

THE FOLLOWING MUST BE COMPLETED, SIGNED, AND RETURNED AS PART OF YOUR BID. BIDS WILL NOT BE ACCEPTED WITHOUT THIS FORM, SIGNED BY AN AUTHORIZED AGENT OF THE BIDDER.

COMPANY NAME _____

MAILING ADDRESS _____

CITY, STATE, ZIP _____

FEDERAL EMPLOYER'S IDENTIFICATION NUMBER (FEIN): _____

TELEPHONE NUMBER: _____ (EXT) _____ FACSIMILE NUMBER _____

EMAIL: _____

I CERTIFY THAT THIS BID IS MADE WITHOUT PRIOR UNDERSTANDING, AGREEMENT, OR CONNECTION WITH ANY OTHER BIDDER SUBMITTING A BID FOR THE SAME MATERIALS, SUPPLIES, EQUIPMENT OR SERVICES, AND IS IN ALL RESPECTS FAIR AND WITHOUT COLLUSION OR FRAUD. I AGREE TO ABIDE TO ALL TERMS AND CONDITIONS OF THIS BID AND CERTIFY THAT I AM AUTHORIZED TO SIGN THIS BID FOR THE BIDDER.

AUTHORIZED SIGNATURE: _____ TYPED OR PRINTED NAME _____

TITLE: _____ DATE _____

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 10i

DATE OF SCHOOL BOARD MEETING: June 24, 2014

TITLE OF AGENDA ITEM: Solid waste collection agreement with Waste Pro.

DIVISION: Facilities

 This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM: For Board approval of solid waste collection, recycling and equipment lease agreement with Waste Pro for the upcoming fiscal year 2013-201. Reference attached pricing structure.

FUND SOURCE: 110

AMOUNT: \$110,697.68

PREPARED BY: *W.S.* Wayne Shepard

POSITION: Director of Facilities

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

 Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered _____

CHAIRMAN'S SIGNATURE: page(s) numbered _____

Be sure that the COMPTROLLER has signed the budget page.

This form is to be duplicated on light blue paper.



Solid Waste Collection Agreement

This contract is made and serves as an agreement between Gadsden County School Board and Waste Pro of Florida, Inc.

Term:

The term of this agreement shall be for (1) year between the dates of July 1, 2014 and June 30, 2015. This agreement can be automatically renewed for additional one year terms at the mutual agreement of the School Board and Waste Pro. Notification of cancelation by either party needs to take place 60 days prior to the annual contract expiration date. The School Board will be given a ninety day notice of any price increases.

Collectors Responsibility:

All solid waste and recycling for Gadsden County schools shall be collected by Waste Pro as an independent contractor of the School Board. Waste Pro shall convey the solid waste and disposal of it as provided under this agreement.

Rates for Commercial and Industrial Service:

Attached to the agreement is Addendum "A" which outlines the service provided along with number of days of service and pricing. In the event of a permanent change in schedule, Waste Pro will notify the School Board two weeks prior to such change provided the School Board agrees to said changes. Any additions to or decreases in service will be added or subtracted from the invoicing based on rates as set forth in Addendum "A".

Service Guarantee:

The School Board will provide Waste Pro with any service issue at which time Waste Pro will have seven days to remedy the problem.

This written instrument constitutes the entire agreement between Gadsden County School Board and Waste Pro of Florida, Inc. All prior and contemporaneous agreements and understandings whether verbal or written, are without effect in the construction of any provision if they alter or otherwise vary any term or condition set forth in this instrument.

Wayne Shepard, Gadsden County School Board
Director of Facilities

Date

Joel Thornton of Waste Pro of Florida, Inc.

Date

Addendum A				
		Current Price	New Price	Difference
	Analysis of Garbage and Recycling for Gadsden County Schools June 6, 2013. The initial breakdown was based on a personal site visit by Joel Thornton of Waste Pro and Terry Harris of Gadsden County School Maintenance on 6/6/13.			
	Joel did an update checking all Waste Pro print screens on May 14, 2014.			
	Joel Thornton, Terry Harris, and Jeff Pollock did a site visit to each school on 5/28/14.			
	NEW PRICING BASED UPON THE CURRENT GADSDEN COUNTY FRANCHISE RATES. These rates are at the end of this spreadsheet.			
1	East Gadsden High			
	There is a rent on this compactor of \$250 per month. There is too little activity on this compactor not to have a lease. It is only pulled once every two months. The pull is \$225 per and on call. The disposal is \$65 per ton at the Quincy transfer station. Waste Pro will provide weight tickets.			
6752 #	Recycle OCC dumpster is in good condion.	\$65.00	\$70.00	\$5.00
2	Havana Middle School			
6764 #	Both dumpsters need new lids. One 6 yd. serviced twice a week.	\$262.79	\$286.18	\$23.39
7813 #	Recycle OCC dumpster is in good condion.	\$65.00	\$70.00	\$5.00
3	Carter Parramore			

*LAST YEAR'S PRICE
\$8,370.00*

Free VIP account # 6749	The VIP is working. Since this municipal solid waste (msw) is "compacted" the disposal fees are doubled. Waste Pro pays disposal based upon weight. Our franchise rates are based upon loose garbage, not compacted garbage. A VIP has 3 to 1 compaction. A 6 yard VIP has the equivalent of 18 loose cubic yards of debris.			
	Current service is a 6 yard VIP serviced twice a week. We figure twice the compaction. A 6 yard twice a week is \$286.18. Twice this is \$572.36. We are not charging you a lease for the VIP as we usually do.	\$554.24	\$572.36	\$18.12
	Our current pricing is not based on VIP.			
6748 #	Recycle OCC dumpster is in good condion.	\$65.00	\$70.00	\$5.00
4	St. John			
	The VIP works.			
Free VIP account #6783	Currently the service is an 8 yard VIP serviced twice a week. We are not charging you a lease for this compactor as we usually do. A VIP does around triple the capacity. We only charge for twice the capacity. An 8 yard twice is \$360.11. Twice this is \$720.22.	\$260.32	\$720.22	\$459.90
6781 #	Recycle OCC dumpster is in good condion.	\$65.00	\$70.00	\$5.00
5	Stewart Street			
6785 #	The VIP is not working. We have tried to fix it but can't. We are not purchasing a new one. According to Jeff Pollock our front load supervisor, this site requires an 8 yard serviced three times a week. The replacement 8 yard is already in place and being serviced 3X.	\$559.51	\$539.67	-\$19.84
6784 #	Recycle OCC dumpster is in good condion.	\$65.00	\$70.00	\$5.00

6	Warehouse			
6779 #	This is a 6 yard serviced 2X. THIS ACCOUNT WILL BE CANCELED.	\$262.79	\$0.00	-\$262.79
no account number. Not being charged.	Recycle OCC dumpster is in good condion. <u>This dumpster will be removed.</u>	\$0.00		\$0.00
7	James Shanks			
Free VIP account # 6766	The VIP is working. We are not charging you a lease for this VIP as we usually do. Capacity is 3X. We are only charging you 2X. An 8 yard 2X is \$360.11. So twice this is \$720.22.			
	Current service is a 8 yard VIP serviced twice a week.	\$559.51	\$720.22	\$160.71
6766	Recycle OCC dumpster is in good condion.	\$65.00	\$70.00	\$5.00
8	West Gadsden			
6791 #	Mr. Willie Lee, the school maintenance superintendent, said that the servicing needs to double. He says that they have been double loading on service days which is not suppose to happen at all, unless such actions are noted as "extra pickups". Again, the weight is substantially larger than what we price. I believe an increase at this location is unavoidable. Jeff Pollock our front load supervisor says that this site has to increase to a minimum of 3 times a week.			
	Currently service level is 1 8-yard serviced twice a week. Needs to increase to 3 times a week.	\$350.39	\$539.67	\$189.28
7808 #	Recycle OCC dumpster is in good condion.	\$65.00	\$70.00	\$5.00
9	Gretna Elementary			
6760 #	Current service level is one 8-yard serviced twice a week.	\$350.39	\$360.11	\$9.72

6760	Recycle OCC dumpster is in good condion.	\$65.00	\$70.00	\$5.00
10	Greensboro Elementary			
6759 #	Current service level is one 8-yard serviced twice a week.	\$350.39	\$360.11	\$9.72
6759 #	Recycle OCC dumpster is in good condion.	\$65.00	\$70.00	\$5.00
11	George Munroe			
Free New VIP account # 6758	The new VIP is in place. We are currently charging you no lease on this new machine as we usually do. A VIP does 3 times compaction. We are only charging for 2. So an 8 yard visit is \$360.11. Three times is \$1,080.33			
	Currently the service is an 8 yard VIP serviced three times a week.	\$538.66	\$1,079.34	\$540.68
6757 #	Recycle OCC dumpster is in good condion.	\$65.00	\$70.00	\$5.00
12	Gadsden Technical			
	Need lids.			
6755 #	Current service level is one 6-yard serviced twice a week. THIS DUMPSTER WILL BE MOVED TO WHERE THE WAREHOUSE DUMPSTER WAS.	\$262.79	\$286.18	\$23.39
6755 #	Recycle OCC dumpster is in good condion. THIS DUMPSTER WILL BE MOVED TO WERE THE WAREHOUSE DUMPSTER WAS.	\$65.00	\$70.00	\$5.00
13	Administration			
6884 #	There are two 6 yard msw dumpsters and one 8-yard OCC dumpster. The original list only had one 6 yard here and this was what our pricing was based on.			
	Current service level is two 6-yards serviced twice a week. .	\$262.79	\$572.36	\$309.57
6884 #	We need to replace the OCC dumpster. Service level is 1X.	\$65.00	\$70.00	\$5.00

14	Gadsden Ed Magnet			
	Need lids. Remove the bar.			
6754	Current service level is one 8-yard serviced twice a week.	\$350.39	\$360.11	\$9.72
no account number. Not being charged.	Fix the recycle lid. Recycling OCC service level is 1X.	\$0.00	\$70.00	\$70.00
15	Bus Garage			
6746 #	Current service level is one 6 yard serviced once a week.	\$142.58	\$143.59	\$1.01
no account number. Not being charged.	Recycle OCC dumpster is in good condion. <u>This dumpster is being removed.</u>	\$0.00	\$0.00	\$0.00
16	Maintenance			
6769 #	Current service level is one 6 yard serviced once a week.	\$142.58	\$143.59	\$1.01
no account number. Not being charged.	Recycle OCC dumpster is in good condion. <u>This dumpster is being removed.</u>	\$0.00	\$0.00	\$0.00
17	Havana Elementary			
6763 #	Current service level is one 8 yard serviced three times a week.	\$538.66	\$539.67	\$1.01
6762 #	Recycle OCC dumpster is in good condion.	\$65.00	\$70.00	\$5.00
18	Midway Head Start			
6772 #	Current service level is one 2 yard serviced twice a week.	\$87.59	\$117.18	\$29.59
19	Quincy Area 3			
8574 #	Current service is a 2 yard twice a week.	\$86.77	\$112.58	\$25.81

5 free compactors would be a normal lease value of \$350 each or \$1,750.	Totals	\$6,768.14	\$8,433.14	\$1,665.00
	Gadsden County Franchise rates			
	Front Load Dumpster size	1X	2X	3X
	2 yard	\$59.10	\$117.18	\$175.28
	4 yard	\$106.62	\$212.24	\$317.86
	6 yard	\$143.59	\$286.18	\$428.77
	8 yard	\$180.55	\$360.11	\$539.67
	Front Load Extra Pickup Charges			
	2 yard	\$50.00		
	4 yard	\$90.00		
	6 yard	\$120.00		
	8 yard	\$150.00		
	VIPs are triple capacity but double the price.			
	6 yard	\$287.18	\$572.36	
	8 yard	\$361.10	\$720.22	\$1,079.34
	VIP Extra Pickup charges are:			
	6 yard	\$240.00		
	8 yard	\$300.00		
	OCC Extra Pickup	\$70.00		

Total for all locations 2014-2015 fiscal year (EGH excluded)	\$8,433.14 (monthly) x 12 =	\$101,197.68
Total estimated charges for trash and recycle at EGH	\$6,500.00 (year)	\$6,500.00
Total equipment lease charges for East Gadsden High	\$3,000.00 (year)	\$3,000.00
		<u>\$110,697.68</u>