AGENDA ROCKY POINT PUBLIC SCHOOLS BOARD OF EDUCATION MEETING April 20, 2021

Meeting called to Order:

I

Present:	Susan Sullivan, President Sean Callahan, Vice President Gregory Amendola, Trustee Edward Casswell, Trustee Jessica Ward, Trustee Scott O'Brien, Ed.D., Superintendent of Schools Susann Crossan, Assistant Superintendent Christopher Van Cott, Assistant Superintendent for Business Kelly White, District Clerk
Absent:	
Pledge of Alle	egiance
Superintende	ent's Report
Smart Fundi	ng Amendment Presentation
CONSENT A	AGENDA .
the Board of I The Consent A vote is taken, motion or second	ed below are presented as part of the Consent Agenda which can be adopted by Education under a single motion followed by a second and then a formal vote. Agenda items are listed in their regular order within a group. Before an actual any Consent Agenda item may be removed by a Board member without a formal ond. If this occurs, the indicated resolution will be discussed during its regular genda and voted on individually.
II-VIII	Consent Agenda Items
BE IT RESO item.	LVED, that the Board of Education accepts the following agenda items as one
II: III: IV: V: VI: VIII:	Minutes – Regular Meeting March 15, 2021 Budget Transfer Summary – March 2021 Treasurer's Reports – March 2021 Extra-Classroom Activity Account Treasurer's Report – March 2021 Financial Reports – March 2021 Internal Claims Audit Report – March 2021 Committees on Special Education Schedules 4-20-2021-A and 4-20-2021-B, as recommended by the Superintendent of Schools, to arrange for appropriate services, as indicated.

Motion______Vote_____

IX Interdistrict Council of Superintendents-Donation Scholarship

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the

	cation approves and accounts, to be deposited to the		on from the Interdistrict Council of U9020.
	Motion	_2 nd	_Vote
X	Live Like Susie Donat	ion	
of Education			Superintendent of Schools, the Board of the Live Like Susie Scholarship,
Kenneth Sapa	nski \$100		
	Motion	_2 nd	_Vote
XI	Kenneth J. Edwards	Memorial Scholars	hip Donation
Board of Educ Memorial Sch	cation approves and acc	epts the donation on Edwards Jr and Sher	e Superintendent of Schools, the behalf of the Kenneth J. Edwards ri Edwards in the amount of \$125.00,
	Motion	_2 nd	_Vote
XII	Rita E. Sullivan Scho	larship	
Education appr		00 scholarship donati	Superintendent of Schools, the Board of on from Roger and Susan Sullivan, to be
	Motion	2 nd	_Vote
XIII	Surplus Equipment		
			e Superintendent of Schools, the ached lists of equipment.
	Motion	_2 nd	_Vote

XIV Surplus Books

			of the Superintendent of Schools, the the following attached list.
	Motion	2 nd	Vote
XV			doption of policy numbers 5670, 6120, tion of new policy numbers 3421 and
BE IT RESO (first reading):		l of Education rev	iews and adopts the following policies
 5670 6120 6121 6190 7551 7554 	Title IX and Sex Disc Records Management Equal Employment C Sexual Harassment in Employee Use of Soc Sexual Harassment of Dignity for All Stude Equal Educational O	of Opportunity In the Workplace It is is the work of the work It is is the work of the wor	
	Motion	_2 nd	Vote
XVI	TAN Borrowing for	the 2021-22 Fisca	al Year
	LVED, that upon the cation approve the follower.		of the Superintendent of Schools, the
dated April 20	, 2021, authorizing th	e issuance of not	Union Free School District, New York, to exceed \$10,000,000 Tax Anticipation ed for the fiscal year ending June 30,
2022.	Motion	2 nd	Vote
XVII	Seneca Consulting	Group – Afforda	ble Care Act Contract for 2021-2022
Board of Educ for Patient Pro additional fees	cation agrees to enter intection and Affordables to print and mail requand ordance with a Request	into a 2021-22 cor le Care Act admin uired IRS 1095 fo tt for Proposal pro	of the Superintendent of Schools, the atract with Seneca Consulting Group, Inc. istration at an annual cost of \$10,500 plus rms. Pricing and terms for this service cess administered by Eastern Suffolk
	MOHOII		Vote

XVIII Municipal Advisor Services Agreement - Munistat

of Educati	ion authorizes the	President of the Bo	n of the Superintendent of Schools, the ard of Education to execute the Munal agent services during the 2021-2022 s	icipal
ycar.	Motion	2 nd	Vote	
XIX	2020-2021 Hea District	alth Service Contra	ct - Center Moriches Union Free Sch	ool
Board of E of Schools	Education authorizes	the President of the	on of the Superintendent of Schools, the Board of Education and the Superintent rvices for the 2020-2021 school year was	dent
Center Mo	oriches Union Free S	School District.		
	Motion	2 nd	Vote	
XX	Contract betw Houghton Mif	-	t UFSD Board of Education and	
Board of E	Education authorizes		on of the Superintendent of Schools, the racy instructional Houghton Mifflin Ha in the attached.	
	Motion	2 nd	Vote	
XXI	Special Educa Inc.		tract – Career & Employment Optio	ns,
Board of E with Caree	Education authorizes er & Employment O er, under applicable	the President of the ptions, Inc. for spec	on of the Superintendent of Schools, the Board of Education to enter into a contalized career assessment for the 2021-2 al Programs, applicable law, and/or Discontinuous contact the superior of the Superior	tract 2022
	Motion	2 nd	Vote	
XXII	2021-2022 BO	CES Cooperative I	idding Services Purchasing Contract	t
Board of E Purchasing	Education approves to Program for the 20	the Resolution to par	on of the Superintendent of Schools, the ticipate in the BOCES Cooperative Bic on an "as needed" basis as per the atta olution (A).	lding
	Motion	$2^{ m nd}$	Vote	

XXIII Bid Award #22-04 In-Car Drivers Education

Board of Educ School, the ov	eation awards Bid #22-0	04 In-Car Drivers Ed	e Superintendent of Schools, the ucation to Suffolk Auto Driving specifications, at a rate of \$395.00
	Motion_	_2 nd	_Vote
XXIV	Transportation Cont	ract / Montauk Bus	Company
Education here ("Contractor")	eby approves a 31-day t	transportation contract	rintendent of Schools, the Board of ct with Montauk Bus Company les NY 11934 to provide sports
BE IT FURT		e President of the Bo	ard of Education is authorized to
	Motion	2 nd	_Vote
of Education a Nawrocki Smi	accepts the following a th, LLC.	commendation of the audit reports as comp	Superintendent of Schools, the Board pleted by the Internal Auditing firm, the Internal Controls of District
Operat	tions; December 2020	C .	Services Cycle; January 2021
Schools, the B Business Office of the Regulat	oard of Education acceptee in response to the autions of the Commission	ots the attached Corredit reports listed about of Education, said New York State Education	mendation of the Superintendent of ective Action Plans as prepared by the ve. As required under Section 170.12 d audit reports and related Corrective lucation Department, Office of Audit
	Motion	_2 nd	_Vote

XXVI Authorization to Expend Capital Reserve Funds on Capital Projects

WHEREAS, the Board of Education of the Rocky Point Union Free School District ("Board") has determined that there is a need to undertake certain capital improvements, renovations and/or alterations to commence during the 2021-2022 school year ("Project"); and

WHEREAS, the Board desires that a proposition be presented to the voters of the School District authorizing the expenditure of available funds from the District's Capital Reserve Fund for that purpose;

NOW, THEREFORE, BE IT RESOLVED, that the Board hereby authorizes and directs that the following proposition be placed before the voters of the Rocky Point Union Free School District at the Annual District Meeting to be conducted on May 18, 2021, and that the District Clerk be hereby authorized and directed to give notice of such proposition to be voted at said Annual District Meeting by publishing a notice thereat: the requisite number of times.

PROPOSITION NO. 2 (Capital Reserve Project Proposition):

RESOLVED:

That the Board of Education of the Rocky Point Union Free School District ("District"), is hereby authorized to appropriate and expend from the Capital Reserve Fund, approved by the voters and established on May 16, 2006, and amended on May 21, 2013, an amount not to exceed \$450,000 for the purpose of undertaking an improvement project ("Project") to commence during the 2021-2022 school year and to consist of the installation of a new district-wide phone system and other work required in connection therewith, including preliminary costs and costs incidental thereto; and to transfer such sum into the District's Capital Fund as needed to be expended and applied toward the costs of said Project.

XXVII	Desalution to	A dont the 2021 (2022 Property Tax Rep	art Card
AAVII	Resolution to	Auopt the 2021-	2022 I Toperty Tax Kep	ort Caru
Board of E	, <u> </u>		ation of the Superintend cy Point Union Free Scho	
	Motion	2 nd	Vote	
XXVIII	Resolution to	Approve the Upo	lated 2021-2022 Prope	rty Tax Cap Form
	, <u>1</u>		ation of the Superintend -2022 Property Tax Cap	,

Motion 2nd Vote

Motion _____2nd_____Vote____

XXIX Vote to Approve/Disapprove the BOCES Administrative Budget for 2021-2022

BE IT RESOLVED, that the Board of Education approves/disapproves the BOCES Administrative Budget for 2021-2022 in the amount of \$47,495,266.

Roll Call:				
Mrs. Sullivan	Appro	ove	Disapprove	
Mr. Callahan	Appro	ove	Disapprove	
Mr. Amendola	a Appro	ove	Disapprove	
Mr. Casswell	Appro	ove	Disapprove	
Ms. Ward	Appro	ove	Disapprove	
	Motion	2 nd	Vote	
XXX			on the Board of Cooperative l ory District of the County of	
			tion elects the following candid ling on June 30, 2024. (<i>Choose</i>	. ,
Arlene Barre	<u>si</u>			
Roll Call:				
Mrs. Sullivan		Approve	Disapprove	
Mr. Callahan		Approve	Disapprove	
Mr. Amendola	a	Approve	Disapprove	
Mr. Casswell		Approve	Disapprove	
Ms. Ward		Approve	Disapprove	
Joseph LoSch	<u>niavo</u>			
Roll Call:				
Mrs. Sullivan		Approve	Disapprove	
Mr. Callahan		Approve		
Mr. Amendola	ı	Approve		
Mr. Casswell		Approve		
Ms. Ward		Approve	Disapprove	
James F. McI	Kenna			
Roll Call:				
Mrs. Sullivan		Approve	Disapprove	
Mr. Callahan		Approve	Disapprove	
Mr. Amendola	a	Approve		
Mr. Casswell		Approve	Disapprove	
Ms. Ward		Approve		

Brian O. Mealy Roll Call: Approve _____ Mrs. Sullivan Disapprove _____ Disapprove _____ Approve _____ Mr. Callahan Approve _____ Mr. Amendola Disapprove _____ Mr. Casswell Approve _____ Disapprove ____ Ms. Ward Approve Disapprove Robert P. Sweeney Roll Call: Mrs. Sullivan Approve _____ Disapprove _____ Mr. Callahan Disapprove _____ Approve _____ Disapprove _____ Approve _____ Mr. Amendola Approve _____ Disapprove ____ Mr. Casswell Approve _____ Disapprove ____ Ms. Ward Motion 2nd Vote XXXI Resolution to Adopt the 2021-2022 School District Budget **BE IT RESOLVED,** that upon the recommendation of the Superintendent of Schools, the Board of Education adopts the Rocky Point Union Free School District Budget for the 2021-2022 fiscal year pursuant to the Education Law Section 1716 in the amount of \$85,692,726. Motion_____2nd_____Vote____ XXXII Appointment of Poll Clerks and Tellers for the Annual Budget Vote and Election to be held on May 18, 2021 **BE IT RESOLVED**, that the Board of Education appoints the Poll Clerks; Tellers and Substitute Poll Clerks and Tellers at an hourly rate of \$14.00 as per the attached list. Motion_____2nd_____Vote____

XXXIII Agreement between the Board of Education and Susan Wilson

Board of Edu Agreement be	cation authorizetween the Dis	tes the President trict and Susan V	of the Board of Edu Wilson in accordance	erintendent of Schools, the acation to execute an e with existing provisions of 10, as per the attached.
	Motion	2 nd	Vote	
XXXIV	Memorandu	m of Agreemer	nt / School-Related	Professionals' Association
Board of Edu School-Relate 2025. Terms	cation hereby in the desired Professional and conditions	ratifies the Mem s' Association f of the collective	orandum of Agreem or the period of July bargaining agreem	erintendent of Schools, the ent with the Rocky Point 1, 2020 through June 30, ent between the District and e updated accordingly.
	Motion	2 nd	Vote	
XXXV	Personnel			
			endation of the Supersonnel changes.	erintendent of Schools, the
	Motion	2 nd	Vote	
XXXVI	New Busines	SS		
XXXVII	Executive Se	ession		
At				Executive Session to discuss
		2 nd	 Vote	
The Board r	eturned to ope	en session at		_
XXVIII	Adjournmen	ıt		
I move that the	ne Board of Ed	ucation adjourns	s the meeting at	PM
	Motion	2 nd	Vote	

MINUTES ROCKY POINT PUBLIC SCHOOLS BOARD OF EDUCATION MEETING March 15, 2021

Mrs. Sullivan called the meeting to order at 6:04 p.m. in the auditorium of Rocky Point High School.

Present: Susan Sullivan, President

Sean Callahan, Vice President

Gregory Amendola, Trustee (Arriving at 6:20 p.m.)

Edward Casswell, Trustee Jessica Ward, Trustee

Scott O'Brien, Ed.D., Superintendent of Schools

Susann Crossan, Assistant Superintendent

Christopher Van Cott, Assistant Superintendent for Business

Kelly White, District Clerk

Absent:

EXECUTIVE SESSION

At 6:04 p.m. a motion was made by Ed Casswell, and seconded by Jessica Ward, to adjourn to Executive Session to discuss legal and personnel matters.

All in favor – Motion carried 4-0

The Board returned to Open Session at 7:10 p.m.

PLEDGE OF ALLEGIANCE

SUPERINTENDENT'S REPORT

Mr. Van Cott presented the second of three budget workshops. He advised that the final presentation would take place at the April 20th Board of Education meeting.

Topics of discussion were as follows:

- Continuation of Budget Review
 - Special Education
 - Instructional Support
 - Athletics
- Tax Cap
 - Consumer Price Index
 - Calculations
- Suggested Capital Reserve Proposition
- Important Upcoming Dates

Mr. Van Cott opened the floor to any questions/comments.

There were no questions/comments.

He also noted that the budget information is posted on the school website.

Mrs. Sullivan opened the floor to questions/comments regarding the agenda.

There were no questions/comments.

CONSENT AGENDA

The items listed below are presented as part of the Consent Agenda which can be adopted by the Board of Education under a single motion followed by a second and then a formal vote. On the following page the Consent Agenda items are listed in their regular order within a group. Before an actual vote is taken, any Consent Agenda item may be removed by a Board member without a formal motion or second. If this occurs, the indicated resolution will be discussed during its regular order on the agenda and voted on individually.

III-IX CONSENT AGENDA ITEMS

Upon a motion made by Sean Callahan, and seconded by Jessica Ward, the following resolution was offered:

BE IT RESOLVED, that the Board of Education accepts the following agenda items as one item.

- III: MINUTES Regular Meeting February 8, 2021; Special Meeting March 2, 2021
- IV BUDGET TRANSFER SUMMARY January and February 2021
- V: TREASURER'S REPORTS January and February 2021
- VI: EXTRA-CLASSROOM ACTIVITY ACCOUNT TREASURER'S REPORT January and February 2021
- VII: Financial Reports January and February 2021
- VIII: INTERNAL CLAIMS AUDIT REPORT January and February 2021
- IX: COMMITTEES ON SPECIAL EDUCATION SCHEDULES 3-15-21-A and 3-15-21-B, as recommended by the Superintendent of Schools, to arrange for appropriate services, as indicated.

All in favor - Motion carried 5 - 0

X DONATION FROM OHIOPYLE PRINTS, INC.

Upon a motion made by Jessica Ward, and seconded by Ed Casswell, the following resolution was offered:

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approves and accepts the donation from Ohiopyle Prints, Inc.

BE IT RESOLVED, that the Rocky Point Union Free School District hereby approves upon the recommendation of the Superintendent of Schools, to increase the general fund budget by \$71.87 as a result of the donation from Ohiopyle Prints. Inc.

BE IT FURTHER RESOLVED, that the following budget code be adjusted to reflect that increase:

A2110 500 03 0000 \$71.87

All in favor - Motion carried 5 - 0

Mrs. Sullivan thanked Ohiopyle for their donation.

XI DR. JOHN HAGGERTY SCHOLARSHIP DONATIONS

Upon a motion made by Ed Casswell and seconded by Gregory Amendola, the following resolution was offered:

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approves and accepts the donation on behalf of the Dr. John Haggerty Memorial Scholarship, totaling \$1,440.00, as follows:

Maureen Haggerty	\$1,000
Robert/Elizabeth Lauritsen	\$100
Law Offices of Edmond C. Chakmakian, P.C.	\$100
Christine Joyce	\$40
Kathleen/Dominick Yovino	\$40
Michael/Jennifer Balamoti	\$40
William/Jean Carr	\$40
Carol Yovino	\$20
Tina/James Peterson	\$20
Jeffrey/Cynthia Stuart	\$20
John/Barbara Petino	\$20

All in favor - Motion carried 5 - 0

Mrs. Sullivan thanked all who donated.

XII MUNISTAT SCHOLARSHIP DONATION

Upon a motion made by Gregory Amendola and seconded by Sean Callahan, the following resolution was offered:

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approves and accepts the \$250.00 donation from Munistat Services, Inc., to be deposited to the Scholarship Fund U9009.

All in favor - Motion carried 5 - 0

Mrs. Sullivan thanked Munistat for their donation.

XIII SURPLUS BOOKS

Upon a motion made by Sean Callahan, and seconded by Jessica Ward, the following resolution was offered:

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approves for surplus the books on the following attached list.

All in favor - Motion carried 5 - 0

XIV CITIZENS CAMPAIGN FUND FOR THE ENVIRONMENT GRANT AWARD

Upon a motion made by Jessica Ward, and seconded by Ed Casswell, the following resolution was offered:

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education accepts the award of \$2,500.00 from Citizens Campaign Fund for the Environment.

BE IT RESOLVED, that the Rocky Point Union Free School District hereby approves upon the recommendation of the Superintendent of Schools, to increase the general fund budget by \$2,500.00 as a result of the award from the Citizens Campaign Fund for the Environment.

BE IT FURTHER RESOLVED that the following budget code be adjusted to reflect that increase:

A2110 208 04 0000 \$2,500

All in favor - Motion carried 5 - 0

Mrs. Sullivan thanked Citizens Campaign Fund for their donation.

XV BID AWARD #21-10 CLOSED LOOP HEATING SYSTEM & STEAM BOILER WATER TREATMENT PROGRAMS AT FJC, JAE AND RPHS

Upon a motion made by Ed Casswell and seconded by Gregory Amendola, the following resolution was offered:

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education awards Bid #21-10 Closed Loop Heating System & Steam Boiler Water Treatment Programs at FJC, JAE and RPHS to Garratt-Callahan Company, the overall lowest responsible bidder meeting bid specifications, as per the attached.

XVI SPECIAL EDUCATION TUITION CONTRACT – MILLER PLACE UFSD

Upon a motion made by Gregory Amendola and seconded by Sean Callahan, the following resolution was offered:

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approves a tuition contract with the Miller Place Union Free School District whereby the Rocky Point Union Free School District shall provide requested special education instruction services to Miller Place resident student(s) for the 2020-21 school year.

All in favor - Motion carried 5 - 0

XVII SEQRA (STATE ENVIRONMENTAL QUALITY REVIEW ACT) RESOLUTION – 2021 – 2022 CAPITAL PROJECT

Upon a motion made by Sean Callahan, and seconded by Jessica Ward, the following resolution was offered:

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Rocky Point Union Free School District Board of Education approves the following resolution:

WHEREAS, the Board of Education of the Rocky Point Union Free School District (Board of Education) is considering improvements District Wide for the Rocky Point UFSD and

WHEREAS, the proposed project includes

- Door Replacement at Frank J. Carasiti Elementary School
- Door Replacement and Floor Tile Replacement at Rocky Point Middle / High School

WHERAS, pursuant to 6 NYCRR §617.5 (a), "Actions or classes of actions identified in subdivision (c) of this section are not subject to review under this Part, except as otherwise provided in this section. These actions have been determined not to have a significant impact on the environment or are otherwise precluded from environmental review under Environmental Consideration Law, Article 8. The actions identified in subdivision (c) of this section apply to all agencies"; and

WHEREAS, pursuant to 6 NYCRR §617.5(c) (1)&(2) the "maintenance or repair involving no substantial changes in an existing structure or facility", replacement, rehabilitation or reconstruction of a structure of facility, in kind, on the same site, including upgrading buildings to meet building or fire codes ...", are Type II actions.

THEREFORE, BE IT RESOLVED, that the Board of Education, after review of the proposed action, 6 NYCRR §617.5, and the opinion provided by John A. Grillo Architect PC, hereby determines that the proposed projects are Type II Actions pursuant to 6 NYCRR §617.5(c) (1) & (2) of the implementing regulations of the State Environmental Quality Review Act, and will, therefore, by definition, have no significant adverse impact on the environment.

All in favor - Motion carried 5 - 0

XVIII SEQRA (STATE ENVIRONMENT QUALITY REVIEW ACT) RESOLUTION – DISTRICTWIDE TELEPHONE SYSTEM REPLACEMENT

Upon a motion made by Jessica Ward, and seconded by Ed Casswell, the following resolution was offered:

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Rocky Point Union Free School District Board of Education approves the following resolution:

WHEREAS, the Board of Education of the Rocky Point Union Free School District (Board of Education) is considering improvements District Wide for the Rocky Point UFSD and

WHEREAS, the proposed project includes

• District Wide Telephone System Replacement

WHEREAS, pursuant to 6 NYCRR §617.5(a). "Actions or classes of actions identified in subdivision (c) of this section are not subject to review under this Part, except as otherwise provided in this section. These actions have been determined not to have a significant impact on the environment or are otherwise precluded from environmental review under Environmental Consideration Law, Article 8. The actions identified in subdivision (c) of this section apply to all agencies"; and

WHEREAS, pursuant to 6 NYCRR §617.5(c) (1)&(2) the "maintenance or repair involving no substantial changes in an existing structure of facility", replacement, rehabilitation or reconstruction of a structure of facility, in kind, on the same site, including upgrading buildings to meet building or fire codes...", are Type II actions.

THEREFORE, BE IT RESOLVED, that the Board of Education, after review of the proposed action, 6 NYCRR §617.5, and the opinion provided by John A. Grillo Architect PC, hereby determines that the proposed projects are Type II Actions pursuant to , 6 NYCRR §617.5(c) (1)&(2) of the implementing regulations of the State Environmental Quality Review Act, and will, therefore, by definition, have no significant adverse impact on the environment.

All in favor - Motion carried 5 - 0

XIX 2020-2021 HEALTH SERVICE CONTRACTS

Upon a motion made by Ed Casswell and seconded by Gregory Amendola, the following resolution was offered:

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education authorizes the President of the Board of Education and the Superintendent of Schools to enter into an agreement for health services for the 2020-2021 school year with the following districts:

Riverhead Central School District Smithtown Central School District South Huntington Union Free School District West Islip Union Free School District

XX REVISION OF THE PREVIOUSLY ADOPTED SCHOOL-LEVEL DISTRICT SAFETY PLAN

Upon a motion made by Gregory Amendola and seconded by Sean Callahan, the following resolution was offered:

WHEREAS, Labor Law section 27-c requires school districts to update existing District-Wide Safety Plans with Continuity of Operation procedures. The 2020-21 Safety Plan has been revised accordingly and has been posted to the District website to allow for a 30-day public comment period;

WHEREAS, no public comments were received by the District during the comment period;

RESOLVED, based upon the recommendation of the Superintendent of Schools, the Board of Education will adopt the revised 2020-21 District-Wide Safety Plan and will post the final version to the district website.

All in favor - Motion carried 5 - 0

XXI ADOPTION OF BOARD OF EDUCATION POLICY NUMBER 5633 (SECOND READING)

Upon a motion made by Sean Callahan, and seconded by Jessica Ward, the following resolution was offered:

BE IT RESOLVED, that the Board of Education adopts the following new policy (second reading):

• 5633 – Gender Neutral Single-Occupancy Bathrooms

All in favor - Motion carried 5 - 0

XXII RESOLUTION TO APPROVE THE FINAL 2021-2022 PROPERTY TAX CAP FORM

Upon a motion made by Jessica Ward, and seconded by Ed Casswell, the following resolution was offered:

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approves the final Rocky Point Union Free School District Property Tax Cap form, as attached.

All in favor - Motion carried 5 - 0

XXIII OPTION TO EXTEND LEASE AGREEMENT WITH THE NORTH SHORE YOUTH COUNCIL

Upon a motion made by Ed Casswell and seconded by Gregory Amendola, the following resolution was offered:

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the District is hereby authorized to extend the terms of the existing lease agreement with the North Shore Youth Council for five additional years. The renewed lease term will commence September 1, 2021 and run through August 31, 2026.

All in favor - Motion carried 5 - 0

XXIV RFP AWARD – CONSULTING SERVICES - STATE AID / STAC CLAIMS PROCESSING 2021-22 SCHOOL YEAR

Upon a motion made by Gregory Amendola and seconded by Sean Callahan, the following resolution was offered:

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approves and appoints Edgewater Consulting, LLC for Consulting Services-State Aid/STAC Claims Processing in accordance with the scope of services submitted in response to the District's request for proposal for the 2021-2022 school year, as per the attached.

All in favor - Motion carried 5 - 0

XXV APPOINTMENT OF THE EXECUTIVE DIRECTOR OF CURRICULUM, TECHNOLOGY AND INNOVATION

Upon a motion made by Sean Callahan, and seconded by Jessica Ward, the following resolution was offered:

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education hereby appoints Aaron Factor as Executive Director of Curriculum, Technology, and Innovation effective July 1, 2021 through July 1, 2025, and authorizes the President of the Board of Education to execute a corresponding Employment Agreement with Aaron Factor in the form and upon the terms and conditions approved by the Board of Education, as attached hereto.

All in favor - Motion carried 5 - 0

Mrs. Sullivan congratulated Mr. Factor on his new position and wished him continued success with the District.

XXVI PERSONNEL

Upon a motion made by Jessica Ward, and seconded by Ed Casswell, the following resolution was offered:

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education accepts the attached Personnel changes, as presented.

All in favor - Motion carried 5 - 0

XXVII NEW BUSINESS

Mrs. Sullivan inquired of the trustees if there was any new business they wished to discuss.

There was no new business.

Once again Mrs. Sullivan invited the meeting attendees for questions/comments.

• Ms. Nixdorf commented regarding the school's practice to include the Regents exam score as a fifth of the final course grade. Mrs. Sullivan and Dr. O'Brien advised that they are currently pending direction from the State to determine if Regents exams will be given this year. Mrs. Sullivan added that the Board of Education will discuss the possibility of excluding the Regents score as part of the course grade but noted that it does raise the student's final grade in some cases.

There were no further questions/comments.

XXVIII ADJOURNMENT

At 7:41 p.m. a motion was made by Ed Casswell, and seconded by Jessica Ward, to adjourn the meeting.

All in favor - Motion carried 5 - 0

MINUTES ROCKY POINT PUBLIC SCHOOLS SPECIAL MEETING OF THE BOARD OF EDUCATION April 15, 2021

Susan Sullivan called the meeting to order at 5 p.m. in the library of Rocky Point High School to discuss recently added funds from the government.

Present: Susan Sullivan, President

Sean Callahan, Vice President Edward Casswell, Trustee Jessica Ward, Trustee

Scott O'Brien, Ed.D., Superintendent of Schools

Susann Crossan Assistant Superintendent

Christopher Van Cott, Assistant Superintendent for Business

Kelly White, District Clerk

Absent: Gregory Amendola, Trustee

PLEDGE OF ALLEGIANCE

ADJOURNMENT

At 6:15 p.m. a motion was made by Sean Callahan, and seconded by Jessica Ward, to adjourn the meeting.

All in favor – Motion carried 4-0

Respectfully submitted,

Kelly White District Clerk

Budget Transfer Summary Report March 2021

	From Account				To Account			
From Account #	Description	Amo	ount	To Account #	Description	An	nount	Reason
A2138440033120	Conference & Travel	\$	220.00	A2110440030000	Conference	\$	220.00	Conference
A2110400040000	Contractual	\$	5,000.00	A1430161040000	Non Instruct Overtime	\$	5,000.00	Cover Negative Balance

ROCKY POINT UNION FREE SCHOOL DISTRICT FINANCE REPORTS FOR THE MONTH ENDED MARCH 2021

BOARD MEETING BOOK

TREASURER'S REPORT EXTRA-CLASSROOM ACTIVITY TREASURER'S REPORT

REPORTS FILED IN DISTRICT CLERKS OFFICE:

CASH REPORT
CASH FLOW REPORT

GENERAL FUND

TRIAL BALANCE REVENUE STATUS REPORT APPR. BUDGET STATUS REPORT

CAFETERIA FUND

TRIAL BALANCE REVENUE STATUS REPORT APPR. BUDGET STATUS REPORT

FEDERAL FUND

TRIAL BALANCE REVENUE STATUS REPORT APPR. BUDGET STATUS REPORT

CAPITAL FUND

TRIAL BALANCE REVENUE STATUS REPORT APPR. BUDGET STATUS REPORT

TRUST AND AGENCY FUND TRIAL BALANCE

SCHOLARSHIP FUND TRIAL BALANCE

DEBT SERVICE FUND

TRIAL BALANCE REVENUE STATUS REPORT APPR. BUDGET STATUS REPORT

STUDENT ACTIVITY TRIAL BALANCE

Rocky Point Union Free School District Treasurer's Report For the Month Ended: March 31, 2021

Rocky Point Union Free School District Treasurer's Report General Fund - Investment A2008 As of March 31, 2021

Reconciled Balance as of: 2/28/2021			21,658,283.05
Donaista.			
Receipts:			
Tax Revenue	1,195,824.55		
General Aid End of FY Revenue 2020-2021	4,716,146.53		
General Aid Spring Advance Revenue 2020-2021	The Market Control of the Control of		
Commercial Gaming Revenue 2020-2021	157,312.22		
VLT Lottery Revenue 2020-2021	153,950.62		
State Aid Library Materials 2020-2021	18,393.00		
State Aid Hardware 2020-2021	45,653.00		
State Aid Textbook 2020-2021	129,231.00		
State Aid Software 2020-2021	44,087.00		
State Aid Cleary School Revenue 2019-2020 Summer School Revenue 2020-2021	21,413.87		
Homeless Aid Revenue 2019-2020	225,242.09		
Summer Food Service Program 2020-2021	114,099.97—		
UPK Revenue 2019-2020	83,508.00 19,506.00		
UPK Revenue 2020-2021	19,714.00		
Excess Cost Revenue 2020-2021	2,820,499.20		
4408 Revenue 2017-2018	1,465.68		
4408 Revenue 2018-2019	10,572.72		
4408 Revenue 2019-2020	8,000.80		
Interest Revenue	3,203.08 —		
	Action of the second of the se		12,107,410.56
District			
Disbursements:			
Funding Transfer: Interfund Transfer		150,000.00	
Funding Transfer: AP Warrants Funding Transfer: Net Payroll		1,154,106.45	
Funding Transfer: Net Payroll Funding Transfer: Payroll Deductions		3,060,708.46	
runding transfer. Payron Deductions	_	2,153,112.97	(0.547.007.00)
			(6,517,927.88)
Total available balance per General Ledger as of:	3/31/2021		27,247,765.73
			47,217,700.70
Bank Balance as of: 3/31/2021			27,247,765.73

Prepared by Luda Bilski
Date: 4/6/2021

Reviewed by: Date:

Virginia Hollman

A 2008

ROCKY POINT UFSD
GENERAL FUND INVESTMENT ACCOUNT
90 ROCKY POINT YAPHANK RD
ROCKY POINT NY 11778-8423

▶ Contact your Relationship Manager to discuss targeted solutions for your evolving business needs.

ACCOUNT SUMMARY

FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Govt Banking Blended Chking		ı	ROCKY POINT UFSD
Previous Balance 02/28/21	\$21,658,283.05	Number of Days in Cycle	31
14 Deposits/Credits	\$12,107,410.56	Minimum Balance This Cycle	\$20,054,719.75
Interest Paid	\$0.00	Average Collected Balance	\$21,333,913.69
8 Checks/Debits	(\$6,517,927.88)	Interest Earned During this Cycle	\$0.00
Service Charges	\$0.00	Interest Paid Year-To-Date	\$5,378.10
Ending Balance 03/31/21	\$27 247 765 73		

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Govt Banking Blended Chking

ROCKY POINT UFSD

Date	Description	Deposits/Credits	Withdrawals/Debits	Resulting Balance
03/01	ACH deposit BROOKHAVEN CASH DISB 030121 ROCKY POINT SCH DIST	\$566,443.21		\$22,224,726.26
03/02	ACH deposit NYS OSC ACH 030221 ROCKY POINT SCHOOL DIS AP00056302654	\$76,038.00		\$22,300,764.26
03/03	Book transfer debit TO3946		\$1,038,229.30	\$21,262,534.96
03/03	Book transfer debit TO3954		\$729,089.50	\$20,533,445.46
03/08	ACH deposit BROOKHAVEN CASH DISB 030821 ROCKY POINT SCH DIST	\$346,159.74		\$20,879,605.20
03/09	ACH deposit NYS OSC ACH 030921 ROCKY POINT SCHOOL DIS AP00056321489	\$12,038.40		\$20,891,643.60
03/10	ACH deposit NYS OSC ACH 031021 ROCKY POINT SCHOOL DIS AP00056323588	\$27,506.80		\$20,919,150.40
03/15	ACH deposit NYS OSC ACH 031521 ROCKY POINT SCHOOL DIS AP00056335357	\$2,934,599.17		\$23,853,749.57

Thank you for banking with us.

PAGE 1 OF 2



ROCKY POINT UFSD



Cash Account Transactions Report From 3/1/2021 To 3/31/2021

Account Date	Account Name Ref Number Invoice # Vendor	D Explanation	Schedule	Debits	Credits	Balanc
\ 2008	CAPITAL ONE INVESTMENT		Leaf Control C			
12000		BALANCE 07/01/2020 - 02/28/2021		0.00	0.00	21,658,283.0
03/01/2021	1028353	Tax Revenue #7	CR-9	566,443.21	0.00	22,224,726.2
03/02/2021	1028367	Summer Food Service Program Revenue Jan. '21	CR-9	76,038.00	0.00	22,300,764.2
03/03/2021	1028365	Trust & Agency Deductions 3/5/21	CR-9	0.00	729,089.50	21,571,674.7
03/03/2021	1028366	Funding Net Payroll 3/5/21	CR-9	0.00	1,038,229.30	20,533,445.4
03/08/2021	1028370	Tax Revenue #8	CR-9	346,159.74	0.00	20,879,605.2
03/09/2021	1028372	4408 Revenue 2017-2018	CR-9	1,465.68	0.00	20,881,070.8
03/09/2021	1028373	4408 Revenue 2018-2019	CR-9	10,572.72	0.00	20,891,643.60
03/10/2021	1028374	4408 Revenue 2019-2020	CR-9	8,000.80	0.00	20,899,644.40
03/10/2021	1028375	UPK Revenue 2019-2020	CR-9	19,506.00	0.00	20,919,150.40
03/15/2021	1028385	Excess Cost Revenue 2020-2021	CR-9	2,820,499.20	0.00	23,739,649.60
03/15/2021	1028386	Homeless Aid Revenue 2019-2020	CR-9	114,099.97	0.00	23,853,749.5
03/16/2021	1028387	VLT Lottery Revenue 2020-2021	CR-9	153,950.62	0.00	24,007,700.1
03/16/2021	1028391	Trust & Agency Deductions 3/19/21	CR-9	0.00	714,986.42	23,292,713.7
03/16/2021	1028394	Interest Revenue	CR-9	3,203.08	0.00	23,295,916.8
03/17/2021	1028388	Summer School Revenue 2020-2021	CR-9	165,776.24	0.00	23,461,693.0
03/17/2021	1028389	Summer School Revenue 2020-2021	CR-9	59,465.85	0.00	23,521,158.9
03/18/2021	1028384	funding transfer	CR-9	0.00	150,000.00	23,371,158.9
03/18/2021	1028390	Funding Warrant #49	CR-9	0.00	1,154,106.45	22,217,052.49
03/19/2021	1028392	Funding Net Payroll 3/19/21	CR-9	0.00	1,014,322.40	21,202,730.09
03/22/2021	1028393	Tax Revenue #9	CR-9	283,221.60	0.00	21,485,951.69
03/22/2021	1028417	State Aid Library Materials 2020-2021	CR-9	18,393.00	0.00	21,504,344.69
03/22/2021	1028418	State Aid Hardware 2020-2021	CR-9	45,653.00	0.00	21,549,997.69
03/23/2021	1028419	State Aid Textbook 2020-2021	CR-9	129,231.00	0.00	21,679,228.69
03/23/2021	1028420	State Aid Software 2020-2021	CR-9	44,087.00	0.00	21,723,315.69
03/24/2021	1028421	Summer Food Service Program Dec. 2020	CR-9	2,468.00	0.00	21,725,783.69
03/24/2021	1028422	Summer Food Service Program Jan. 2021	CR-9	2,864.00	0.00	21,728,647.69
03/24/2021	1028423	Summer Food Serv. Program Feb. 2021	CR-9	2,138.00	0.00	21,730,785.69
03/24/2021	1028424	State Aid Cleary School Rev. 2019-2020	CR-9	21,413.87	0.00	21,752,199.56
03/24/2021	1028425	UPK Revenue 2020-2021	CR-9	19,714.00	0.00	21,771,913.56
03/26/2021	1028426	Trust & Agency Deductions 4/2/21	CR-9	0.00	709,037.05	21,062,876.51
03/26/2021	1028427	Funding Net Payroll 4/2/21	CR-9	.0.00	1,008,156.76	20,054,719.75

ROCKY POINT UFSD



Cash Account Transactions Report From 3/1/2021 To 3/31/2021

Account Date	Account Name Ref Number Invoice #	Vendor ID	Explanation	Schedule	Debits	Credits	Balance
A 2008	CAPITAL ONE IN	VESTMENT					
	1028429		2020-2021 General Aid End of FY Payment	CR-9	4,716,146.53	0.00	24,770,866.28
03/31/2021			2020-2021 General Aid Spring Advance	CR-9	2.319.587.23	0.00	27,090,453.51
03/31/2021	1028430				157.312.22	0.00	27.247.765.73
03/31/2021	1028431		2020-2021 Commercial Gaming Revenue	CR-9	157,312.22	0.00	21,247,700.70
			ř .	Grand Totals:	12,107,410.56	6,517,927.88	27,247,765.73

Rocky Point Union Free School District Treasurer's Report General Fund - AP Checking A2010 As of March 31, 2021

Reconciled Balance a	as of: 2/28/2021			1,743,006.20
Receipts:	Health, Dental, Life Chromebook Fees Donation Refund	14,595.75 450.00 100.00 2,452.24		
	Funding Transfer	1,154,106.45		1,171,704.44
Disbursements:	Cash Disbursements		1,763,823.54	(1,763,823.54)
Total available balan	ce per General Ledger as of:	3/31/2021		1,150,887.10
Bank Balance as of:	3/31/2021			1,209,630.50
Less:	Outstanding Checks			(58,743.40)
Adjusted Bank Balar	nce as of: 3/31/2021			1,150,887.10

Prepared by: Lenda Bulsky
Date: 4/6/2021

Reviewed by: Date:

Virginia Holy

A 2010

ROCKY POINT UFSD GENERAL FUND CHECKING 90 ROCKY POINT YAPHANK RD ROCKY POINT NY 11778-8423

 Contact your Relationship Manager to discuss targeted solutions for your evolving business needs.

ACCOUNT SUMMARY

FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Govt Banking Blended Chki	ng		ROCKY POINT UFSD
Previous Balance 02/28/21	\$1,881,121.10	Number of Days in Cycle	31
12 Deposits/Credits	\$1,173,091.69	Minimum Balance This Cycle	\$1,209,630.50
232 Checks/Debits	(\$1,844,582.29)	Average Collected Balance	\$1,605,705.62
Service Charges	\$0.00	3-1-11-1-2-2-11-11-0	\$1,000,700.02
Ending Balance 03/31/21	\$1,209,630,50		

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Govt Banking Blended Chking

ROCKY POINT UFSD

Descrip	tion	Deposits/Credits	Withdrawals/Debits	Resulting Balance
Custom	er Deposit	\$1,387.25		\$1,882,508.35
Check	115204		\$4,178.86	\$1,878,329.49
Check	115187			\$1,875,480.49
Check	115216		The first section of the section of	\$1,873,673.54
Check	115198			\$1,872,098.54
Check	11186			\$1,870,556.88
Check	115211			\$1,869,091.87
Check	115222		A Maria Mari	\$1,867,963.37
Check	115218			\$1,867,055.10
Check	115217			\$1,866,532.44
Check	115190			\$1,866,154.92
Check	115205			\$1,865,958.54
Check	115196			\$1,865,877.49
Check	115220			\$1,865,807.93
Check	115208			\$1,825,874.03
Check	115219			\$1,797,832.68
Check	115209			\$1,792,332.68
Check	115207			\$1,787,115.78
Check	115191			\$1,784,963.18
	Check	Check 115187 Check 115216 Check 115198 Check 11186 Check 115211 Check 115222 Check 115218 Check 115217 Check 115217 Check 115190 Check 115196 Check 115205 Check 115208 Check 115208 Check 115209 Check 115209 Check 115207	Check 115204 Check 115187 Check 115216 Check 115198 Check 11186 Check 115211 Check 115222 Check 115218 Check 115217 Check 115217 Check 115190 Check 115205 Check 115205 Check 115208 Check 115208 Check 115209 Check 115209 Check 115207	Customer Deposit \$1,387.25 Check 115204 \$4,178.86 Check 115187 \$2,849.00 Check 115216 \$1,806.95 Check 115198 \$1,575.00 Check 11186 \$1,541.66 Check 115211 \$1,465.01 Check 115222 \$1,128.50 Check 115218 \$908.27 Check 115217 \$522.66 Check 115190 \$377.52 Check 115205 \$196.38 Check 115205 \$81.05 Check 115208 \$39,933.90 Check 115219 \$28,041.35 Check 115209 \$5,500.00 Check 115207 \$5,216.90

Thank you for banking with us.

PAGE 1 OF 10





ROCKY POI			
	ING CHECK LIST		
AS OF MAR	CH 31, 2021		
CHECK#	CHECK DATE	CHECK AMOUNT	
114527	10/06/2020	155.62	
114530	10/06/2020	155.62	
114550	10/06/2020	155.62	
114563	10/06/2020	155.62	
114574	10/06/2020	155.62	i I
114860	11/17/2020	160.00	
115201	02/23/2021	86.88	
115313	03/09/2021	75.00	1
115375	03/16/2021	8,370.00	
115380	03/16/2021	4,187.70	
115389	03/16/2021	18,634.21	
115393	03/16/2021	165.00	
115394	03/23/2021	20.00	
115402	03/23/2021	325.50	
115406	03/23/2021	1,007.50	
115410	03/23/2021	2,084.00	
115413	03/23/2021	19,784.89	
115418	03/23/2021	408.42	!
115421	03/23/2021	2,291.20	
115422	03/23/2021	65.00	
115427	03/23/2021	300.00	
		58,743.40	
	<u> </u>		ļ

ROCKY POINT UFSD



Cash Account Transactions Report From 3/1/2021 To 3/31/2021

Account	Account Name				make it will		
Date	Ref Number Invoice #	Vendor ID	Explanation	Schedule	Debits	Credits	Balance
A 2010	CAPITAL ONE A	P CHECKING					
			BALANCE 07/01/2020 - 02/28/2021		0.00	0.00	1,743,006.20
03/03/2021			See Cash Disbursement Schedule 46	CD-46	0.00	276,260.95	1,466,745.25
03/03/2021	1028368		Chromebook Fees	CR-9	150.00	0.00	1,466,895.25
03/09/2021	1028371		Chromebook Fees	CR-9	75.00	0.00	1,466,970.25
03/10/2021			See Cash Disbursement Schedule 48	CD-48	0.00	135,037.75	1,331,932.50
03/15/2021	1028379		health dental life deposit	CR-9	5,328.00	0.00	1,337,260.50
03/15/2021	1028381		dental deposits	CR-9	1,913.76	0.00	1,339,174.26
03/15/2021	1028382		fluid imagery refund	CR-9	2,452.24	0.00	1,341,626.50
03/17/2021			See Cash Disbursement Schedule 49	CD-49	0.00	1,154,106.45	187,520.05
03/17/2021	1028383		Health Deposits	CR-9	4,813.88	0.00	192,333.93
03/18/2021	1028390		Funding Warrant #49	CR-9	1,154,106.45	0.00	1,346,440.38
03/18/2021	1028432		Chromebook Fees	CR-9	75.00	0.00	1,346,515.38
03/19/2021	1028433		Chromebook Fees	CR-9	75.00	0.00	1,346,590.38
03/22/2021	1028395		health dental life deposits	CR-9	2,540.11	0.00	1,349,130.49
03/22/2021	1028399		Live Like Susie Scholarship Donation	CR-9	100.00	0.00	1,349,230.49
03/24/2021	102000		See Cash Disbursement Schedule 51	CD-51	0.00	198,418.39	1,150,812.10
03/26/2021	1028434		Chromebook Fees	CR-9	75.00	0.00	1,150,887.10
				Grand Totals:	1,171,704.44	1,763,823.54	1,150,887.10

Rocky Point Union Free School District Treasurer's Report General Fund - Investment A2011 As of March 31, 2021

Reconciled Balance as of:	2/28/2021		1,853,963.09
Receipts:	State Aid 2019-2020 Reimbursement Refund Return of Funds Interest Revenue	187,568.55 74,811.88 349.90 500.00 16.73	263,247.06
Disbursements:			0.00
Total available balance per	General Ledger as of:	3/31/2021	2,117,210.15
Bank Balance as of: 3/31	/2021		2,117,210.15

Prepared by: Suda Belske
Date: 4/6/2021

Reviewed by: Date: Yilginia Holly



Columbus, OH 43218-2051

A 2011

JPMorgan Chase Bank, N.A.
P O Box 182051

February 27, 2021 through March 31, 2021

Customer Service Information

If you have any questions about your statement, please contact your Customer Service Professional.

00056783 WBS 802 211 09121 NNNNNNNNNN 1 000000000 C2 0000 ROCKY POINT UFSD GENERAL FUND MONEY MARKET A/C 90 ROCKY POINT YAPHANK RD ROCKY POINT NY 11778-8423

Commercial Checking With Interest Summary

Opening Ledger E	Balance		Number	Market Value/Amount \$1,853,930.36	Shares
Deposits and Cre	dits		4	\$263,279.79	
Withdrawals and Debits		0	\$0.00		
Checks Paid			0	\$0.00	
Ending Ledger Balance			\$2,117,210.15		
Average Ledger Balance		\$1,989,671	Annual Percentage Yield Earned*		0.01%
Interest Credited This Period		\$16.73	Interest	Credited Year-to-Date	\$46.27
Rate(s):	03/01 to 0	3/31 at 0.01%			

Deposits and Credits

Ledger	Description	Amount
Date		Amount
03/01	Deposit	\$32.73
03/08	Deposit	500.00
03/15	Deposit	262,730.33
03/31	Interest Payment	16.73
Total		\$263,279.79

Daily Balance

Date	Ledger Balance	Date	Ledger Balance
03/01	\$1,853,963.09	03/15	\$2,117,193.42
03/08	\$1,854,463.09	03/31	\$2,117,210.15

^{*} Annual Percentage Yield Earned - the percentage rate earned if balances remain on deposit for a full year with compounding, n change in the interest rate and all interest rate and all interest is left in the account.

Please examine this statement of account at once. By continuing to use the account, you agree that: (1) the account is subject to the Bank's deposit account agreement, and (2) the Bank has no responsibility for any error in or improper charge to the account

ROCKY POINT UFSD



Cash Account Transactions Report From 3/1/2021 To 3/31/2021

Account Date	Account Name Ref Number Invoice #	Vendor ID	Explanation	Schedule	Debits	Credits	Balance
A 2011	CHASE GENERA	L FUND MM					
			BALANCE 07/01/2020 - 02/28/2021		0.00	0.00	1,853,963.09
03/05/2021	1028369		Return of Funds	CR-9	500.00	0.00	1,854,463.09
03/12/2021	1028376		Reimbursement B. Interiano	CR-9	74,811.88	0.00	1,929,274.97
03/12/2021	1028377		19 20 State Aid	CR-9	187,568.55	0.00	2,116,843.52
03/12/2021	1028378		Best Buy Refund	CR-9	349.90	0.00	2,117,193.42
03/31/2021	1028435		Interest Revenue	CR-9	16.73	0.00	2,117,210.15
03/3 1/2021	1020-100			Grand Totals:	263,247.06	0.00	2,117,210.15

Rocky Point Union Free School District Treasurer's Report Cafeteria Checking - C207 As of March 31, 2021

Reconciled Balance as of:	2/28/2021			154,671.21
Receipts:	Funding Transfer	150,000.00		
Disbursements:				150,000.00
	Cash Disbursements		43,619.18	(43,619.18)
Total available balance per G	eneral Ledger as of:	3/31/2021		261,052.03
				*
Bank Balance as of: 3/31/2	2021			263,605.27
Less:	Outstanding Checks			(2,553.24)
Adjusted Bank Balance as o	f: 3/31/2021			261,052.03

Y11011102

Prepared by: Arda Belski Reviewed by: Date:

Date: 4/7/2021

Reviewed by: Date:

C207

ROCKY POINT UFSD CAFETERIA CHECKING 90 ROCKY POINT YAPHANK RD ROCKY POINT NY 11778-8423 Contact your Relationship Manager to discuss targeted solutions for your evolving business needs.

ACCOUNT SUMMARY

FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Govt Banking Blended Chkin	g		ROCKY POINT UFSD
Previous Balance 02/28/21	\$159,286.54	Number of Days in Cycle	31
1 Deposits/Credits	\$150,000.00	Minimum Balance This Cycle	\$132,294.97
56 Checks/Debits	(\$45,681.27)	Average Collected Balance	\$202,994.23
Service Charges	\$0.00		Q202,001.20
Ending Balance 03/31/21	\$263 605 27		

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Govt Banking Blended Chking

ROCKY POINT UFSD

Date			Deposits/Credits Withdrawals/Debits	Resulting Balance
03/01	Check	12104	\$975.28	\$158,311.26
03/01	Check	12097	\$895.22	\$157,416.04
03/01	Check	12101	\$594.16	\$156,821.88
03/01	Check	12103	\$510.41	\$156,311.47
03/01	Check	12100	\$50.88	\$156,260.59
03/02	Check	12102	\$474.46	\$155,786.13
03/02	Check	12098	\$58.61	\$155,727.52
03/05	Check	12092	\$940.50	\$154,787.02
03/08	Check	12114	\$2,807.72	\$151,979.30
03/08	Check	12107	\$2,644.86	\$149,334.44
03/08	Check	12115	\$1,342.92	\$147,991.52
03/08	Check	12105	\$1,264.88	\$146,726.64
03/08	Check	12117	\$1,241.85	\$145,484.79
03/08	Check	12116	\$1,180.71	\$144,304.08
03/08	Check	12119	\$881.00	\$143,423.08
03/08	Check	12111	\$764.70	\$142,658.38
03/08	Check	12110	\$539.90	\$142,118.48
03/09	Check	12108	\$492.80	\$141,625.68
03/09	Check	12109	\$1,777.67	\$139,848.01

Thank you for banking with us.

PAGE 1 OF 4



ROCKY POINT UFSD





Account:

Capital One Cafeteria Checking

Cash Account(s): C 207

Adjusted Ending Bank Balance:		261,052.03	
Other Debits:	-	0.00	
Other Credits:	+ .	0.00	
Deposits in Transit:	+	0.00	
Outstanding Checks (See listing below):	-	2,553.24	
Ending Bank Balance:		263,605.27	

Cash Account Balance:

261,052.03

Outstanding Check Listing

_	Check Date	Check Number	Payee	Amount	
	09/08/2020	11922	DEMETRA MAVROPHILIPOS	17.65	
	09/15/2020	11925	MICHELLE AMEDURI	37.65	
	03/09/2021	12125	NICKERSON VENDING LLC	275.00	
	03/16/2021	12136	MEADOW PROVISIONS CORP	828.89	
	03/23/2021	12145	AMERICAN CLASSIC SPECIALTIES	338.55	
	03/23/2021	12147	DELI DESIGN INC.	267.50	
	03/23/2021	12152	R & M STERN, INC.	788.00	
			Outstanding Check Total:	2,553.24	

Prepared By

Approved By



Cash Account Transactions Report From 3/1/2021 To 3/31/2021

Account	Account Name	4 14	- 0	Cabadala	Debits	Credits	Balance
Date	Ref Number Invoice #	Vendor ID	Explanation	Schedule	Debits	Oreuts	
C 207	CAPITAL ONE C	HECKING					
			BALANCE 07/01/2020 - 02/28/2021		0.00	0.00	154,671.21
03/03/2021			See Cash Disbursement Schedule 22	CD-22	0.00	17,628.99	137,042.22
03/10/2021			See Cash Disbursement Schedule 23	CD-23	0.00	4,636.75	132,405.47
03/12/2021	156		Annual NYS Sales Tax Payment	JE-21	0.00	501.31	131,904.16
03/17/2021			See Cash Disbursement Schedule 24	CD-24	0.00	10,115.27	121,788.89
03/18/2021	1028384		funding transfer	CR-9	150,000.00	0.00	271,788.89
03/16/2021	1020304		See Cash Disbursement Schedule 25	CD-25	0.00	10,736.86	261,052.03
03/24/2021				Grand Totals:	150.000.00	43,619,18	261,052.03

1/1

Rocky Point Union Free School District Treasurer's Report Cafeteria Fund ACH C208 As of March 31, 2021

Reconciled Balance as of:	2/28/2021			229,889.46
Receipts:				
	Café ACH Deposits		15,061.69	
	Café Deposits Interest		7,904.59	
	interest		2.02	22,968.30
				22,000.00
Disbursements:				0.00
Dispursements.				0.00
Total available balance per	General Ledger as of	3/31/2021		252,857.76
	contonal Ecogor ac on	010112021		202,001.10
Bank Balance as of:	3/31/2021			252,575.91
Add: Deposits in Trans	it			281.85
	9) -			
Adjusted Bank Balance as	of: 3/31/2021			252,857.76
				0.00

Prepared by: Linda Belski Reviewed by: Prepared by: Prepa





JPMorgan Chase Bank, N.A. P O Box 182051 Columbus, OH 43218-2051 February 27, 2021 through March 31, 2021

CUSTOMER SERVICE INFORMATION

If you have any questions about your statement, please contact your Customer Service Professional.

00045890 DDA 802 212 09121 NNNNNNNNNN 1 000000000 C1 0000
ROCKY POINT UFSD
SCHOOL LUNCH ACH
90 ROCKY POINT YAPHANK RD
ROCKY POINT NY 11778

CHECKING SUMMARY

Commercial Checking With Interest

Beginning Balance	INSTANCES	AMOUNT \$227,971.91
Deposits and Additions	238	24,604.00
Ending Balance	238	\$252,575.91
Annual Percentage Yield Earned Thi	0.01%	
Interest Paid This Period		\$2.02
Interest Paid Year-to-Date		\$5.28

Interest paid in 2020

was \$31.05.

DEPOSITS AND ADDITIONS

DATE	DESCRIPTION	AMOUNT
03/01	Deposit	\$120.25
03/01	Deposit	109.75
03/01	Deposit	93.90
03/01	Deposit	91.50
03/01	Deposit	66.00
03/01	Deposit	32.00
03/01	Deposit	16.50
03/01	Deposit	13.00
03/01	Deposit	2.75
03/01	Deposit	
03/01	Deposit	2.00
03/01	Dopoole	1.00
00/01		380.00



Account Date	Account Name Ref Number Invoice #	Vendor ID	Explanation	Schedule	Debits	Credits	Balance
C 208	CHASE ACH RE						
C 200	OTAGE NOTTILE		BALANCE 07/01/2020 - 02/28/2021		0.00	0.00	229,889.46
03/01/2021	1028402		CAF'T RECEIPTS	CR-7	359.60	0.00	230,249.06
03/02/2021	1028403		CAF'T RECEIPTS	CR-7	341.96	0.00	230,591.02
03/02/2021	1028404		CAF'T RECEIPTS	CR-7	438.75	0.00	231,029.77
03/03/2021	1028405		CAF'T RECEIPTS	CR-7	262.72	0.00	231,292.49
03/04/2021	1028406		CAF'T RECEIPTS	CR-7	661.90	0.00	231,954.39
	1028407		CAF'T RECEIPTS	CR-7	304.35	0.00	232,258.74
03/08/2021	1028408		CAF'T RECEIPTS	CR-7	388.20	0.00	232,646.94
03/09/2021	1028409		CAF'T RECEIPTS	CR-7	382.45	0.00	233,029.39
03/10/2021			CAF'T RECEIPTS	CR-7	554.80	0.00	233,584.19
03/11/2021	1028410		CAF'T RECEIPTS	CR-7	536.24	0.00	234,120.43
03/12/2021	1028411		CAF'T RECEIPTS	CR-7	409.31	0.00	234,529.74
03/15/2021	1028412		CAF'T RECEIPTS	CR-7	408.70	0.00	234,938.44
03/16/2021	1028413		CAF'T RECEIPTS	CR-7	414.50	0.00	235,352.94
03/17/2021	1028414		CAF'T RECEIPTS	CR-7	299.75	0.00	235,652.69
03/18/2021	1028415		CAF'T RECEIPTS	CR-7	519.75	0.00	236,172.44
03/19/2021	1028416		CAF'T RECEIPTS	CR-7	270.05	0.00	236,442.49
03/22/2021	1028442		CAF'T RECEIPTS	CR-7	320.89	0.00	236,763.38
03/23/2021	1028443		CAF'T RECEIPTS	CR-7	365.93	0.00	237,129.31
03/24/2021	1028444		CAF'T RECEIPTS	CR-7	322.64	0.00	237,451.95
03/25/2021	1028445		CAF'T RECEIPTS	CR-7	341.25	0.00	237,793.20
03/26/2021	1028446			JE-21	0.85	0.00	237,794.05
03/31/2021	169		Miscellaneous Revenue	CR-9	2,533.61	0.00	240,327.66
03/31/2021	1028437		FJC ACH	CR-9	3,124.33	0.00	243,451.99
03/31/2021	1028438		JAE ACH	CR-9	5,228.50	0.00	248,680.49
03/31/2021	1028439		RPHS ACH	CR-9	4,175.25	0.00	252,855.74
03/31/2021	1028440		RPMS ACH Interest Revenue	CR-9	2.02	0.00	252,857.76
03/31/2021	1028441		Interest Neverine	Grand Totals:	22,968.30	0.00	252,857.76

Rocky Point Union Free School District Treasurer's Report Federal Fund Checking - F205 As of March 31, 2021

Reconciled Balance as of:	2/28/2021			364,741.24
Receipts:				0.00
Disbursements:				
Cash Dis	bursements		25,510.00	(25,510.00)
Total available balance per Ge	neral Ledger as of:	3/31/2021		339,231.24
Bank Balance as of: 3/31/202	1			339,231.24

Prepared by: Lepola Bulski
Date: 4/6/2021

Reviewed by: Date:

Vicquie fla

F205

ROCKY POINT UFSD FEDERAL CHECKING 90 ROCKY POINT YAPHANK RD ROCKY POINT NY 11778-8423 Contact your Relationship Manager to discuss targeted solutions for your evolving business needs.

ACCOUNT SUMMARY

FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Govt Banking Blended Chkin	g		ROCKY POINT UFSD
Previous Balance 02/28/21	\$384,351.24	Number of Days in Cycle	31
0 Deposits/Credits	\$0.00	Minimum Balance This Cycle	\$339,231.24
5 Checks/Debits	(\$45,120.00)	Average Collected Balance	\$359,419.62
Service Charges	\$0.00	•	7000,170.02
Ending Balance 03/31/21	\$339 231 24		

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Govt Banking Blended Chking

ROCKY POINT UFSD

Date	Descript	tion	Deposits/Credits	Withdrawals/Debits	Resulting Balance
03/01	Check	4586		\$9,010.00	\$375,341.24
03/08	Check	4587		\$10,600.00	\$364,741.24
03/15	Check	4588		\$9,010.00	\$355,731.24
03/25	Check	4589		\$10,600.00	\$345,131.24
03/30	Check	4590		\$5,900.00	\$339,231.24
Total			\$0.00	\$45,120.00	

Govt Banking Blended Chking

ROCKY POINT UFSD

Check No.	Date	Amount	Check No.	Date	Amount	Check No.	Date	Amount
4586	03/01	\$9,010.00	4588	03/15	\$9,010.00	4590	03/30	\$5,900.00
4587	03/08	\$10,600.00	4589	03/25	\$10,600.00			,,,,,,,,,

Thank you for banking with us.

PAGE 1 OF 2





Account Date	Account Name Ref Number Invoice #	Vendor ID	Explanation	Schedule	Debits	Credits	Balance
F 205	CAPITAL ONE C	HECKING					
			BALANCE 07/01/2020 - 02/28/2021		0.00	0.00	364,741.24
03/10/2021			See Cash Disbursement Schedule 13	CD-13	0.00	19,610.00	345,131.24
03/24/2021			See Cash Disbursement Schedule 14	CD-14	0.00	5,900.00	339,231.24
00/24/2021				Grand Totals:	0.00	25,510.00	339,231.24

Rocky Point Union Free School District Treasurer's Report Capital Fund Checking - H205 As of March 31, 2021

Reconciled Balance as of:	2/28/2021			938,858.22
Receipts:				0.00
Disbursements:			I Tamasa	0.00
Total available balance per	r General Ledger as of:	3/31/2021	-	938,858.22
			- 11 3 1	
Bank Balance as of:	3/31/2021			938,858.22
				0.00

Prepared by: Linda Belske
Date: 4/6/2021

Reviewed by: Date: Virginia flore

H205

ROCKY POINT UFSD CAPITAL FUND CHECKING 90 ROCKY POINT YAPHANK RD ROCKY POINT NY 11778-8423 ➤ Contact your Relationship Manager to discuss targeted solutions for your evolving business needs.

ACCOUNT SUMMARY

FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Govt Banking Blended Chking			ROCKY POINT UFSD
Previous Balance 02/28/21	\$938,858.22	Number of Days in Cycle	31
0 Deposits/Credits	\$0.00	Minimum Balance This Cycle	\$938,858.22
0 Checks/Debits	\$0.00	Average Collected Balance	\$938,858.22
Service Charges	\$0.00		,
Ending Balance 03/31/21	\$938,858.22		

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Govt	Banking Blended Chking		Aller III	ROCKY POINT UFSD
Date	Description	Deposits/Credits	Withdrawals/Debits	Resulting Balance
03/01		74	5	\$938,858.22
	No Account Activity this Statement Period			
03/31				\$938,858.22
Total		\$0.00	\$0.0	0
No Iter	ms Processed			

Thank you for banking with us.

PAGE 1 OF 2





Account Date	Account Name Ref Number Invoice #	Vendor ID	Explanation		Star _N	Schedule	Debits	Credits	Balance
H 205	CAPITAL ONE C			000 00/00	, (×	0.00	0.00	938,858.22
			BALANCE 07/01/20	020 - 02/28	/2021 	Grand Totals:	0.00	0.00	938,858.22

Rocky Point Union Free School District Treasurer's Report Trust and Agency Checking - T204 As of March 31, 2021

Reconciled Balance as	of: 2/28/2021			1,070,673.62
Receipts:	NYSSMA	1,598.00		
	Payroll Deductions	4,205,664.67		
				4,207,262.67
Disbursements:				
	Cash Disbursements		3,339,869.54	(3,339,869.54)
g**				
Total available balance	e per General Ledger as of:	3/31/2021		1,938,066.75
Bank Balance as of:	3/31/2021			1,953,678.94
· · ·				
Less:	Outstanding Checks			(15,612.19)
Adjusted Bank Balanc	e as of : 3/31/2021			1 938 066 75

Prepared by: Linda Bilaki
Date: 4/6/2021

Reviewed by: Date: Jirgi 46/2023

T204

ROCKY POINT UFSD TRUST AND AGENCY ACCOUNT 90 ROCKY POINT YAPHANK RD ROCKY POINT NY 11778-8423 ▶ Contact your Relationship Manager to discuss targeted solutions for your evolving business needs.

ACCOUNT SUMMARY

FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Govt Banking Blended Chki	ng		ROCKY POINT UFSD
Previous Balance 02/28/21	\$1,126,841.82	Number of Days in Cycle	31
5 Deposits/Credits	\$3,308,817.42	Minimum Balance This Cycle	\$1,103,038.49
41 Checks/Debits	(\$2,481,980.30)	Average Collected Balance	\$1,499,705.62
Service Charges	\$0.00		
Ending Balance 03/31/21	\$1,953,678.94		

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Date 03/01 03/02	Descript Check		Deposits/Credits		
			Depositsionedits	Withdrawals/Debits	Resulting Balance
03/02	01 1	13067		\$15,753.00	\$1,111,088.82
00/02	Check	13066		\$4,661.96	\$1,106,426.86
03/02	Check	13063		\$2,214.10	\$1,104,212.76
03/02	Check	13064		\$1,174.27	\$1,103,038.49
03/03	Book tra	nsfer credit FROM5277	\$729,089.50		\$1,832,127.99
03/05		nsfer withdrawal The OMNI 30521 USD0007840162		\$94,741.70	\$1,737,386.29
03/05	USATA	thdrawal IRS KPYMT 030521 ROCKY POINT L DIS 270146XXXXX8330		\$429,400.89	\$1,307,985.40
03/05	Paymnt	thdrawal NYS DTF PROMP WT Tax 030521 ROCKY POINT UFSD XXXXX3220		\$75,230.65	\$1,232,754.75
03/08	Check	13062		\$24,493.00	\$4 200 264 7E
03/09	Check	13079		\$16,151.52	\$1,208,261.75 \$1,192,110.23
03/09	Check	13070		\$9,002.60	\$1,183,107.63
03/09	Check	13071		\$1,506.20	\$1,181,601.43
03/09	Check	13044		\$555.00	\$1,181,046.43
03/09	Check	13055		\$555.00	
03/09	Check	13025		\$555.00	\$1,180,491.43 \$1,179,936.43

Thank you for banking with us.

PAGE 1 OF 4

Bank Reconciliation for period ending on 3/31/2021



Account:

Capital One Trust & Agency Checking

Cash Account(s): T 204

Ending Bank Balance:		1,953,678.94
Outstanding Checks (See listing below):	-	15,612.19
Deposits in Transit:	+	0.00
Other Credits:	+	0.00
Other Debits:	~	0.00

Adjusted Ending Bank Balance:

1,938,066.75

Cash Account Balance:

1,938,066.75

Outstanding Check Listing

Check Date	Check Number	Payee	Amount
11/23/2020	12985	Donna Haskamp	46.00
11/23/2020	12986	Erin Fitzsimmons	46.00
11/23/2020	12995	PATRICIA KREPIL	24.00
11/23/2020	13007	Wendy Mulzoff	46.00
11/23/2020	13009	JENNIFER YOUNG	8.00
03/16/2021	13086	ROCKY POINT ADMIN ASSOCIATION	1,110.00
03/16/2021	13090	VOTE COPE	216.25
03/23/2021	13091	AFLAC	8,839.94
03/23/2021	13093	NYSSMA	1,582.00
03/23/2021	13094	WESTERN SUFFOLK BOCES	3,694.00
		Outstanding Check Total:	15,612.19

Prepared By

Approved By



Account Date	Account Name Ref Number Invoice #	Vendor ID	Explanation	Schedule	Debits	Credits	Balance
T 204	CAPITAL ONE TR	RUST & AGEN	CY				
			BALANCE 07/01/2020 - 02/28/2021		0.00	0.00	1,070,673.62
03/03/2021			See Cash Disbursement Schedule 36	CD-36	0.00	11,025.99	1,059,647.63
03/03/2021	1028365		Trust & Agency Deductions 3/5/21	CR-9	729,089.50	0.00	1,788,737.13
03/05/2021	150		FICA & MED & T&A DEDUCTIONS	JE-21	1,038,229.30	0.00	2,826,966.43
03/10/2021			See Cash Disbursement Schedule 38	CD-38	0.00	3,390.00	2,823,576.43
03/15/2021	1028380		NYSSMA Deposits	CR-9	1,598.00	0.00	2,825,174.43
03/16/2021	1028391		Trust & Agency Deductions 3/19/21	CR-9	714,986.42	0.00	3,540,160.85
03/19/2021	153		FICA, MED, & T&A DEDUCTIONS	JE-21	1,014,322.40	0.00	4,554,483.25
03/24/2021			See Cash Disbursement Schedule 40	CD-40	0.00	15,622.14	4,538,861.11
03/24/2021	158		Cleared Check#12469	JE-21	0.00	46.00	4,538,815.11
03/24/2021	159		Cleared Check #12784	JE-21	0.00	16.00	4,538,799.11
03/26/2021	1028426		Trust & Agency Deductions 4/2/21	CR-9	709,037.05	0.00	5,247,836.16
03/31/2021			See Cash Disbursement Schedule 37	CD-37	0.00	1,662,617.86	3,585,218.30
03/31/2021			See Cash Disbursement Schedule 39	CD-39	0.00	1,647,151.55	1,938,066.75
			-	Grand Totals:	4,207,262.67	3,339,869.54	1,938,066.75

Rocky Point Union Free School District Treasurer's Report Net Payroll Checking - T205 As of March 31, 2021

Reconciled Balance	as of: 2/28/2021			50,322.54
Receipts:				
	Funding Transfer	3,060,708.46		
				3,060,708.46
Disbursements:				
	Disburse Net Payroll		2,052,551.70	
				(2,052,551.70)
Total available balar	nce per General Ledger as of:	3/31/2021		1,058,479.30
				1,000,110.00
Bank Balance as of:	3/31/2021			1,086,460.04
Less:	Outstanding Checks			(27,980.74)
Adjusted Bank Bala	nce as of: 3/31/2021			1,058,479.30
				1,000,470.00

Prepared by: Linda Belski
Date: 4/6/2021

Reviewed by: Date: Juginie H

T205

ROCKY POINT UFSD PAYROLL ACCOUNT 90 ROCKY POINT YAPHANK RD ROCKY POINT NY 11778-8423 ▶ Contact your Relationship Manager to discuss targeted solutions for your evolving business needs.

ACCOUNT SUMMARY

FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Govt Banking Blended Chki	ng		ROCKY POINT UFSD
Previous Balance 02/28/21	\$50,640.88	Number of Days in Cycle	31
3 Deposits/Credits	\$3,060,708.46	Minimum Balance This Cycle	\$50,640.88
12 Checks/Debits	(\$2,024,889.30)	Average Collected Balance	\$439,446.23
Service Charges	\$0.00		7.00,1.0120
Ending Balance 03/31/21	\$1,086,460.04		

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Govt I	Banking	Blended Chking			ROCKY POINT UFSD
Date	Descrip	tion	Deposits/Credits	Withdrawals/Debits	Resulting Balance
03/03	Book tra	insfer credit FROM5277	\$1,038,229.30		\$1,088,870.18
03/05	SALARY	thdrawal PAYROLL ROCKYPT REG 7 030521 PAYROLL ROCKYPT TMOBSPEB		\$975,620.50	\$113,249.68
03/05	Check	99666		\$5,255.78	\$107,993.90
03/05	Check	99669		\$3,957.48	\$104,036.42
03/05	Check	99674		\$3,404.09	\$100,632.33
03/05	Check	99675		\$3,051.46	\$97,580.87
03/08	Check	99661		\$3,661.42	\$93,919.45
03/09	Check	99665		\$4,835.84	\$89,083.61
03/11	Check	99664		\$3,421.66	\$85,661.95
03/15	Check	99667		\$4,107.54	\$81,554.41
03/16	Book tra	ansfer credit FROM5277	\$1,014,322.40		\$1,095,876.81
03/19	SALARY	thdrawal PAYROLL ROCKYPT REG Y 031921 PAYROLL ROCKYPT 「MOBSPEB		\$1,013,859.75	\$82,017.06
03/19	Check	99672		\$3,647.28	\$78,369.78
03/23	Check	99678		\$66.50	\$78,303.28

Thank you for banking with us.

PAGE 1 OF 2



OF MARCH	31, 2021		
Check #	Check Date	Check Amt.	
99657	02/05/2021	251.84	
99662	03/05/2021	4,155.84	
99663	03/05/2021	5,120.72	
99668	03/05/2021	4,991.96	
99670	03/05/2021	3,392.38	
99671	03/05/2021	4,319.53	
99673	03/05/2021	5,285.82	
99677	03/19/2021	196.69	
99679	03/19/2021	265.96	///
1		27,980.74	



Account	Account Name	Vandar ID	Evalenation	Schedule	Debits	Credits	Balance
Date	Ref Number Invoice #	Vendor ID	Explanation	Schedule	Debito		
T 205	CAPITAL ONE N	ET PAYROLL					
			BALANCE 07/01/2020 - 02/28/2021		0.00	0.00	50,322.54
03/03/2021	1028366		Funding Net Payroll 3/5/21	CR-9	1,038,229.30	0.00	1,088,551.84
03/05/2021	150		FICA & MED & T&A DEDUCTIONS	JE-21	0.00	1,038,229.30	50,322.54
03/19/2021	153		FICA, MED, & T&A DEDUCTIONS	JE-21	0.00	1,014,322.40	-963,999.86
03/19/2021	1028392		Funding Net Payroll 3/19/21	CR-9	1,014,322.40	0.00	50,322.54
03/26/2021	1028427		Funding Net Payroll 4/2/21	CR-9	1,008,156.76	0.00	1,058,479.30
				Grand Totals:	3,060,708.46	2,052,551.70	1,058,479.30

Rocky Point Union Free School District Treasurer's Report Scholarship Fund Checking - U200 As of March 31, 2021

Reconciled Balance as of: 2/28/2021		48,430.81
Receipts: Munistat Donation Haggerty Donation Ohiopyle Prints Donation	250.00 1,340.00 71.87	1,661.87
Disbursements:		0.00
Total available balance per General Ledger as of: 3/31/20	21	50,092.68
Bank Balance as of: 3/31/2021		50,092.68

Prepared by: Unda Bulski
Date: 4/6/2021

Reviewed by:_ Date:

4/6/2021

U200

ROCKY POINT UFSD SCHOLARSHIP CHECKING 90 ROCKY POINT YAPHANK RD ROCKY POINT NY 11778-8423 ▶ Contact your Relationship Manager to discuss targeted solutions for your evolving business needs.

ACCOUNT SUMMARY

FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Govt Banking Blended Chking			ROCKY POINT UFSD
Previous Balance 02/28/21	\$48,430.81	Number of Days in Cycle	31
3 Deposits/Credits	\$1,661.87	Minimum Balance This Cycle	\$48,430.81
0 Checks/Debits	\$0.00	Average Collected Balance	\$48,487.67
Service Charges	\$0.00		
Ending Balance 03/31/21	\$50,092.68		

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Govt Banking Blended Chking				ROCKY POINT UFSD	
Date	Description	Deposits/Credits	Withdrawals/Debits	Resulting Balance	
03/30	Customer Deposit	\$1,340.00	Service State of the service of the	\$49,770.81	
03/30	Customer Deposit	\$250.00		\$50,020.81	
03/30	Customer Deposit	\$71.87		\$50,092.68	
Total		\$1,661.87	\$0.00		

Thank you for banking with us.





Account Date	Account Name Ref Number Invoice #	Vendor ID	Explanation	Schedule	Debits	Credits	Balance
U 200	CASH IN CHECK	ING					
			BALANCE 07/01/2020 - 02/28/2021	20	0.00	0.00	48,430.81
03/22/2021	1028396		Munistat Scholarship Donation	CR-9	250.00	0.00	48,680.81
03/22/2021	1028397		Ohiopyle Prints Donation	CR-9	71.87	0.00	48,752.68
03/22/2021	1028398		Dr. John Haggerty Scholarship Donations	CR-9	1,340.00	0.00	50,092.68
UUIZZIZUZ I	102000			Grand Totals:	1,661.87	0.00	50,092.68

Rocky Point Union Free School District Treasurer's Report Debt Service Fund Checking - V200 As of March 31, 2021

Reconciled Balance as of: 2/28/2021		117,046.89
Receipts:		0.00
Disbursements:		0.00
Total available balance per General Ledger as of:	3/31/2021	447.040.00
		117,046.89
Peak Pelanasas f		
Bank Balance as of: 3/31/2021		117,046.89

Prepared by: London

Reviewed by: Date:



ROCKY POINT UFSD
DEBT SERVICE FUND
90 ROCKY POINT YAPHANK RD
ROCKY POINT NY 11778-8423

▶ Contact your Relationship Manager to discuss targeted solutions for your evolving business needs.

ACCOUNT SUMMARY

FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Govt Banking Blended Chking			ROCKY POINT UFSD
Previous Balance 02/28/21	\$117,046.89	Number of Days in Cycle	31
0 Deposits/Credits	\$0.00	Minimum Balance This Cycle	\$117,046.89
0 Checks/Debits	\$0.00	Average Collected Balance	\$117,046.89
Service Charges	\$0.00		
Ending Balance 03/31/21	\$117,046.89		

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Govt	Banking Blended Chking			ROCKY POINT UFS	
Date	Description	Deposits/Credits	Withdrawals/Debits	Resulting Balance	
03/01				\$117,046.89	
	No Account Activity this Statement Period				
03/31				\$117,046.89	
Total		\$0.00	\$0.00		
No Iter	ns Processed	-			

Thank you for banking with us.

PAGE 1 OF 2





Account Date	Account Name Ref Number Invoice #	Vendor ID	Explanation	Schedule	Debits	Credits	Balance
V 200	CASH	9					
			BALANCE 07/01/2020 - 02/28/2021		0.00	0.00	117,046.89
				Grand Totals:	0.00	0.00	117,046.89

Rocky Point Union Free School District Treasurer's Report Extra Class Checking - X201 As of March 31, 2021

Reconciled Balance	as of: 2/28/2021			64,488.32
Receipts:	Poinsettia Sale Varsity Club Wall of Honor	75.00 900.00		975.00
Disbursements:	Cash Disbursements		465.56	(465.56)
Total available bala	nce per General Ledger as of:	3/31/2021		64,997.76
Bank Balance as of	3/31/2021			65,111.76
Less:	Outstanding Checks			(444.00)
	Outstanding Offects			(114.00)
Adjusted Bank Bala	nce as of: 3/31/2021			64,997.76
				0.00

Prepared by: Linda Belaki
Date: 4/6/2021

Reviewed by:

J 0/16/2021

X201

ROCKY POINT UFSD EXTRA CLASS CHECKING 90 ROCKY POINT YAPHANK RD ROCKY POINT NY 11778-8423 Contact your Relationship Manager to discuss targeted solutions for your evolving business needs.

ACCOUNT SUMMARY

FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Govt Banking Blended Chking			ROCKY POINT UFSD
Previous Balance 02/28/21	\$65,149.46	Number of Days in Cycle	31
3 Deposits/Credits	\$975.00	Minimum Balance This Cycle	\$64,602.32
2 Checks/Debits	(\$1,012.70)	Average Collected Balance	\$64,761.63
Service Charges	\$0.00	Wording Comociou Building	Ψ04,701.03
Ending Balance 03/31/21	\$65,111.76		

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2021 - MARCH 31, 2021

Govt Banking Blended Chking

ROCKY POINT UFSD

			And the state of t	
Date	Description	Deposits/Credits	Withdrawals/Debits	Resulting Balance
03/02	Check 11353	•	\$547.14	\$64,602.32
03/18	Customer Deposit	\$400.00	ΨΟΨ1.14	\$65,002.32
03/18	Customer Deposit	\$75.00		
03/26	Check 11354	Ψ10.00	\$465.56	\$65,077.32
03/29	Customer Deposit	\$500.00	φ405.56	\$64,611.76
Total			24 242 72	\$65,111.76
, ota,		\$975.00	\$1,012.70	

Govt Banking Blended Chking

ROCKY POINT UFSD

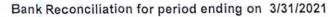
Checks * de	esignates gap in	check sequence						A 7
Check No.	Date	Amount	Check No.	Date	Amount	Check No.	Date	Amount
11353	03/02	\$547.14	11354	03/26	\$465.56			Amount

Thank you for banking with us.

PAGE 1 OF 2









Account: Capital One Extra Class Checking

Cash Account(s): X 201

Ending Bank Balance: 65,111.76

Outstanding Checks (See listing below): - 114.00

Deposits in Transit: + 0.00

Other Credits: + 0.00

Other Debits: - 0.00

Adjusted Ending Bank Balance: 64,997.76

Cash Account Balance: 64,997.76

Outstanding Check Listing

Check Date	Check Number	Payee	Amount
10/06/2020	11339	KAYLEY NEGUS	38.00
10/06/2020	11340	SAMANTHA NIENBURG	38.00
10/06/2020	11345	LIAM UMANZOR	38.00
		Outstanding Check Total:	114.00

Prepared By

Approved By



Cash Account Transactions Report From 3/1/2021 To 3/31/2021

Account	Account Name			- 1 g - 1 to				
Date	Ref Number Invoice #	Vendor ID	Explanation		Schedule	Debits	Credits	Balance
X 201	CAPITAL ONE C	HECKING						
			BALANCE 07/01	/2020 - 02/28/2021		0.00	0.00	64,488.32
03/18/2021	1028400		Poinsettia Sale		CR-9	75.00	0.00	64,563.32
03/18/2021	1028401		Varsity Club Wall	of Honor Bowler Frame	CR-9	400.00	0.00	64,963.32
03/29/2021	1028436		Varsity Club Wall	of Honor Donation	CR-9	500.00	0.00	65,463.32
03/31/2021			See Cash Disbur	sement Schedule 11	CD-11	0.00	465.56	64,997.76
					Grand Totals:	975.00	465.56	64,997.76

1/1

		Marc	ITY ACCOUNTS				
		IVIAIC	11-21				
ROM: 3/1/20	121						
3/31/2021					JE		
0/0 //2021		3/1/2021			OR	3/31/2021	
ACCOUNT	NAME	BEG. BAL.	RECEIPTS	DISB	TRANSFERS	THE RESERVE OF THE PERSON NAMED IN COLUMN 2 IS NOT THE PERSON NAME	
630-7	LEADERS CLUB	\$62.73				\$62.73 \$57.16 00 \$5,313.84 \$327.06 \$747.66 \$3,639.71 \$12,001.67 \$14.11	
630-8	MATH HONOR SOCIETY	\$57.16					
630-9	VARSITY CLUB	\$4,629.40	\$900.00	\$465.56	\$250.00		
6310	SCIENCE CLUB	\$327.06	4000.00	Ψ100.00	Ψ200.00		
6311	SPACE CLUB	\$747.66					
6351	STUDENT COUNCIL-MS	\$3,639.71					
635-3	MS/YEARBOOK	\$12,001.67		7 7/2			
640-3	BUSINESS CLUB	\$14.11					
640-4	MS ROBOTICS	153.29					
645-2	NICER NEIGHBOR CLUB	\$3,716.59			(\$250.00)		
645-4	COMMUNITY SERVICE	\$4,224.92			(ψ200.00)		
645-7	SKILLS USA	\$1,089.37					
6460	GAY/STRAIGHT ALLIANCE	\$0.01					
6461	HUMAN RIGHTS CLUB	\$161.52					
65010	SADD	\$1,283.02					
650-115	THESPIAN TROUPE	\$210.51					
650-12	HS YEARBOOK CLUB	\$20,381.99					
650-16	HS STUDENT COUNCIL	\$6,814.40					
650-17	ART CLUB	\$1,399.48					
65018	BUSINESS HONOR	\$808.87					
650-25	JAE STUDENT COUNCIL	\$2,054.25			 		
6533	ROBOTICS HS	\$505.99			-	The state of the s	
6540	HISTORY HONOR SOCIETY	\$100.06	\$75.00		 	The state of the s	
6542	MATH TEAM	\$202.34	\$75.00		-		
	Sub Total	\$64,586.11	\$975.00	\$465.56	60.00		
700	INTEREST	\$43.43	\$975.00	\$400.00			
	TOTALS	\$64,629.54			\$7.90		
	TOTALS	\$64,629.54				\$65,146.8	
		3/1/2021			CASH	3/31/2021	
		BEG. BAL.	RECEIPTS	DISB.	MOVE	END BAL.	
	KING ACCT - CAP ONE	\$64,488.32	\$975.00	\$465.56	\$0.00	\$64,997.7	
391- DUE FF	ROM GENERAL	\$141.22			\$7.90	\$149.1	
		\$64,629.54				\$65,146.8	
intact, that al	I his financial report is correct, the disbursements were supported by, regulations and school board	by the proper au	s have been recor thorities and docu	rded and dep imentary evid	losited dence		
	10.		/	.0			
Prepared by	Lenda Belski	Reviewed by:	Vigina	Hot	3-		
			10	1 0		PAS 100 PAS 10	
		1	1//		1		

CASH REPORT FOR THE MONTH ENDED March 31, 2021

GENERAL FUND	Dath: Cash		600.00
A210	Petty Cash	\$	
A2008	Capital One Investment	\$	27,247,765.73
A2010	Capital One AP Checking	\$	1,150,887.10
A2011	JP Morgan Chase-Money Market	\$	2,117,210.15
Total Gen	eral Fund:	\$	30,516,462.98
SCHOOL LUNCH F	UND		
C207	Capital One Lunch Fund Checking	\$	261,052.03
C208	JP Morgan Chase-Lunch ACH	\$	252,857.76
Total Sch	ool Lunch Fund:	\$	513,909.79
	2A *		
SPECIAL AID FUN			
F205	Capital One Federal Checking	_\$_	339,231.24
Total Spe	cial Aid Fund:	\$	339,231.24
CAPITAL FUND			
H205	Capital One - Checking	\$	938,858.22
Total Cap	ital Fund:	\$	938,858.22
			000,000.22
TRUST & AGENCY			
T204	Capital One - Checking	\$	1,938,066.75
T205	Capital One - Net Payroll Checking	\$	1,058,479.30
Total Trus	st & Agency Fund:	\$	2,996,546.05
SCHOLARSHIP FU	IND		
U200	Capital One - Checking	\$	50,092.68
Total Sch	olarship Fund	\$	50,092.68
DEBT SERVICE FU	IND		
V200	Capital One - Money Market	\$	117,046.89
Total Deb	t Service Fund	\$	117,046.89
EXTRA CLASS FU	ND		
X201	Capital One - Checking	\$	64,997.76
Total Extr	a Class Fund	\$	64,997.76
Total All F	unds:	\$	35,537,145.61

Rocky Point UFSD PERIOD COVERED 7/1/20 to 6/30/2021 CASH FLOW SUMMARY (THOUSANDS OF DOLLARS)

MONTH	JULY	AUGUST	SEPT	OCT	NOV	DEC	JAN	FEB	MARCH	APRIL	MAY	JUNE
BEGINNING BALANCE	20,572	24,305	21,842	22,065	14,845	9,370	6,802	22,554	25,256	30,516	30,516	30,516
RECEIPTS:	:xxxxxxx	xxxxxxxx	xxxxxxx	xxxxxx	xxxxxxx	(XXXXXXXX	XXXXXXX	xxxxxxx	xxxxxxxx	XXXXXXX	xxxxxxx	XXXXXXX
PROPERTY TAXES	0	2	0	0	0	0	21,273	6,136	1,196	0	0	(
STAR AID	0	0	0	0	0	0	4,892	0	0	0	0	(
STATE AID	1,146	765	4.071	138	144	2,233	144	214	10,728	0	0	(
OTHER	121	46	792	10	250	50	142	2	95	0	0	(
TRF FR OTHER FUNDS	0	0	0	0	373	0	0	250	0	0	0	(
DUE TO OTH FDS	0	0	0	0	0	0	344	370	369	0	0	(
NYS AID DUE TO OTHER FUNDS	633	123	0	0	141	1,017	0	0	0	0	0	(
TAN PROCEEDS	5.043	0	0	0	0	0	0	0	0	0	0	(
TOTAL RECEIPTS:	6,943	936	4,863	148	908	3,300	26,795	6,972	12,388	0	0	(
DIODUDOEMENTO.	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	xxxxxxxx	·vvvvvv	vvvvvv	******	, xxxxxxxx	*******	xxxxxxx	xxxxxxxx	(XXXXXXXX	xxxxxxx	xxxxxx
DISBURSEMENTS:	679	720	2,544	5,063	3.395	3,551	5.350	1.724	5,214	0	0	
SALARY OPERATING EXPENSES	2,531	2.679	1,796	1.891	2,549	2,317	4.814	2,246	1,764	0	0	
	2,531	2,079	1,790	0	2,343	2,517	0	0	0	0	0	
OTHER	0	0	300	0	41	0	879	0	0	0	0	200
DUE TO OTHER FUNDS	0	0	0	0	248	0	0	0	0	0	0	
DEBT SERVICE LOAN TO OTH FDS	0	0	0	414	150	0	0	300	150	0	0	
REPYMT OF LOANS	0	0	0	0	0	0	0	0	0	0	0	
REPYMT OF LOANS	0	0	0	0	0	0	0	0	0	0	0	
NTEREST PAYMENT	0	0	0	0	0	0	0	0	0	0	0	
INT REPAY	0	0	0	0	0	0	0	0	0	0	0	_
TOTAL DISB:	3,210	3,399	4,640	7,368	6,383	5,868	11,043	4,270	7,128	0	0	
		04.040	00.005	44.045	9.370	6.802	22.554	25.256	30,516	30,516	30,516	30,51
BALANCE	24,305 XXXXXXXX	21,842 XXXXXXXXX	22,065 XXXXXXX	14,845 XXXXXXX	XXXXXXXX	(XXXXXXXXX						

Projected Operational Fund Balance	100	0.500	0.500	0.500	0.500	2.500	2 100	2100	2100			
As Of 6/30/2021	2,500	2,500	2,500	2,500	2,500	2,500	2,100	2100	2100			

ROCKY POINT UNION FREE SCHOOL DISTRICT FOR THE MONTH ENDED MARCH 2021

GENERAL FUND





Account	Description	Debits	Credits
A 2008	CAPITAL ONE INVESTMENT	27,247,765.73	0.00
2010	CAPITAL ONE AP CHECKING	1,150,887.10	0.00
2011	CHASE GENERAL FUND MM	2,117,210.15	0.00
210	PETTY CASH	600.00	0.00
. 380	ACCOUNTS RECEIVABLE	57,310.79	0.00
391	DUE FROM FEDERAL FUND	805,632.50	0.00
3911	DUE FROM TRUST AND AGENCY	1,205,508.85	0.00
3912	DUE FROM SCHOOL LUNCH	686,867.19	0.00
3913	DUE FROM SCHLOARSHIP FUND	71.87	0.00
440	DUE FROM OTHER GOVERNMENTS	187,568.55	0.00
4805	PREPAID INSURANCE	60,000.00	0.00
510	ESTIMATED REVENUES	82,320,592.46	0.00
. 521	ENCUMBRANCES	25,934,795.96	0.00
522	EXPENDITURES	45,305,335.98	0.00
599	APPROPRIATED FUND BALANCE	3,650,377.02	0.00
600	ACCOUNTS PAYABLE	0.00	39,803.21
620	TAX ANTICIP NOTES PAYABLE	0.00	5,000,000.00
630	DUE TO OTHER FUNDS	0.00	149.12
6302	DUE TO CAPITAL FUND	0.00	500.00
. 6304	DUE TO TRUST AGENCY	1,650,643.26	0.00
. 6305	DUE TO DEBT SERVICE	0.00	385.74
. 6306	DUE TO SCHOLARSHIP FUND	0.00	732.09
632	DUE TO STATE TEACHERS' RETIREMENT	0.00	110,909.64
691	DEFERRED REVENUES	0.00	500,293.98
. 806	NONSPENDABLE FUND BALANCE	0.00	60,000.00
. 814	WORKER'S COMPENSATION RESERVE	0.00	1,130,044.23
815	UNEMPLOYMENT INSURANCE RESERVE	0.00	465,530.97
. 821	RESERVE FOR ENCUMBRANCES	0.00	25,934,795.96
. 825	ERS RESERVE	0.00	2,804,270.06
826	TRS SUB FUND RESERVE	0.00	1,258,684.96
. 861	PROPERTY LOSS RESERVE	0.00	54,296.00
. 862	LIABILITY LOSS RESERVE	0.00	54,296.00
. 867	RESERVE FOR EMPLOYEE BENEFITS	0.00	4,160,665.02
878	CAPITAL RESERVE	0.00	2,115,889.21
. 909	FUND BALANCE	0.00	1,684,384.96
910	APPROPRIATED FUND BALANCE	0.00	2,577,971.00
911	UNAPPROPRIATED FUND BALANCE	0.00	4,109,884.73
960	APPROPRIATIONS	0.00	85,970,969.48
980	REVENUES	. 0.00	54,346,711.05
	A Fund Totals:	192,381,167.41	192,381,167.41
	Grand Totals:	192,381,167.41	192,381,167.41

Revenue Status Report From 7/1/2020 To 3/31/2021



Account	Description	Budget	Adjustments	Revised Budget	Revenue Earned	Unearned Revenue
A 1001	REAL PROPERTY TAX	47,591,298.12	0.00	47,591,298.12	28,605,382.03	18,985,916.09
A 1085	STAR REIMBURSEMENT	4,891,760.88	0.00	4,891,760.88	4,891,760.88	0.00
A 1315	CONTINUING ED-SUMMER	20,000.00	0.00	20,000.00	0.00	20,000.00
A 1315A	CONTINUING ED-FALL	2,500.00	0.00	2,500.00	0.00	2,500.00
<u>A 1315B</u>	CONTINUING ED-SPRING	2,500.00	0.00	2,500.00	0.00	2,500.00
<u>A 1316</u>	DRIVER EDUCATION-SUMMER	25,000.00	0.00	25,000.00	0.00	25,000.00
A 1316A	DRIVERS ED-FALL	25,000.00	0.00	25,000.00	0.00	25,000.00
A 1316B	DRIVERS ED-SPRING	25,000.00	0.00	25,000.00	22,263.32	2,736.68
<u>A 1489</u>	OTHER CHARGES-PROM, YEARBOOK	69,000.00	0.00	69,000.00	0.00	69,000.00
A 2230	DAY SCHOOL TUITION FROM OTHER DISTRICTS	0.00	0.00	0.00	14,186.16	-14,186.16
A 2401	INTEREST AND EARNINGS	90,000.00	0.00	90,000.00	20,413.75	69,586.25
A 2680	INSURANCE RECOVERIES	0.00	0.00	0.00	264,526.33	-264,526.33
A 2690	FINES - LOST BOOKS	0.00	0.00	0.00	59.99	-59.99
A 2703	PRIOR YEAR REFUNDS-OTHER (NOT TRANS)	350,000.00	0.00	350,000.00	508,530.30	-158,530.30
A 2705	GIFTS AND DONATIONS	0.00	2,268.66	2,268.66	1,968.66	300.00
A 2710	PREMIUM ON OBLIGATIONS	0.00	0.00	0.00	42,652.00	-42,652.00
A 2770	OTHER UNCLASSIFIED	0.00	113.01	113.01	79,664.92	-79,551.91
A 2772	E-RATE REVUENE	1,000.00	0.00	1,000.00	0.00	1,000.00
A 2773	CHROME BOOK REPAIR	0.00	0.00	0.00	500.00	-500.00
A 2801	INTERFUND REVENUE	0.00	0.00	0.00	23,000.00	-23,000.00
A 3101	GROSS STATE AID - BASIC	15,696,217.00	0.00	15,696,217.00	10,546,344.70	5,149,872.30
A 3101.E	STATE AID EXCESS COST	6,000,000.00	0.00	6,000,000.00	4,372,316.20	1,627,683.80
A 3102	STATE AID LOTTERY	4,500,000.00	0.00	4,500,000.00	4,511,514.77	-11,514.77
A 3103	STATE AID BOCES	1,989,039.00	0.00	1,989,039.00	0.00	1,989,039.00
A 3260	STATE AID TEXTBOOKS	180,000.00	0.00	180,000.00	129,231.00	50,769.00
A 3262	STATE AID COMPUTER SOFTWARE	85,000.00	0.00	85,000.00	89,740.00	-4,740.00
A 3263	STATE AID LIBRARY LOAN PROGRAM	17,314.00	0.00	17,314.00	18,393.00	-1,079.00
A 3289	OTHER STATE AID	0.00	0.00	0.00	114,099.97	-114,099.97
A 4285	MEDICAID MANAGEMENT REIMBURSEMENT	75,000.00	0.00	75,000.00	36,475.07	38,524.93
A 4286	CARES ACT	0.00	0.00	0.00	53,688.00	-53,688.00
A 5999	FUND BALANCE APPLIED	0.00	682,581.79	682,581.79	0.00	682,581.79
	A Totals:	81,635,629.00	684,963.46	82,320,592.46	54,346,711.05	27,973,881.41

Revenue Status Report From 7/1/2020 To 3/31/2021



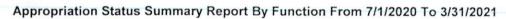
Account	Description		Budget	Adjustments	Revised Budget	Revenue Earned	Unearned Revenue
		Grand Totals:	81,635,629.00	684,963.46	82,320,592.46	54,346,711.05	27,973,881.41





Available	Encumbered	Expensed	Adj. Budget	Adjustments	Budget		Description	ccount
4,039.87	517.38	7,596.14	12,153.39	103.39	12,050.00	*	BOARD OF EDUCATION	1010
0.00	4,808.86	12,556.14	17,365.00	504.00	16,861.00	*	DISTRICT CLERK	1040
10,900.00	0.00	0.00	10,900.00	0.00	10,900.00	*	DISTRICT MEETING	1060
7,796.08	84,726.18	224,997.74	317,520.00	-2,575.00	320,095.00	*	CHIEF SCHOOL ADMINISTRATOR	1240
60,401.12	180,179.97	511,606.91	752,188.00	-5,990.00	758,178.00	*	BUSINESS ADMINISTRATION	1310
13,600.00	27,316.72	42,083.28	83,000.00	0.00	83,000.00	*	AUDITING	1320
1,775.00	0.00	6,225.00	8,000.00	0.00	8,000.00	*	TREASURER	1325
382.00	8,704.32	34,838.68	43,925.00	0.00	43,925.00	*	PURCHASING	1345
0.00	0.00	9,000.00	9,000.00	0.00	9,000.00	*	FISCAL AGENT FEE	1380
1,650.00	4,190.65	44,159.35	50,000.00	-25,000.00	75,000.00	*	LEGAL	1420
3,150.26	147,218.19	319,756.82	470,125.27	7,242.27	462,883.00	*	PERSONNEL	1430
0.00	15,430.20	23,104.80	38,535.00	0.00	38,535.00	*	PUBLIC INFORMATION AND SERVICES	1480
210,200.3	1,177,297.67	3,108,646.42	4,496,144.47	130,374.47	4,365,770.00	*	OPERATION OF PLANT	1620
263,559.8	635,305.97	971,389.12	1,870,254.96	1,019,404.96	850,850.00	*	MAINTENANCE OF PLANT	1621
2,523.6	21,760.36	46,716.04	71,000.00	0.00	71,000.00	*	CENTRAL PRINTING AND MAILING	1670
0.0	272,874.23	548,128.77	821,003.00	-90,000.00	911,003.00	*	CENTRAL DATA PROCESSING	1680
50,696.1	4,195.52	471,549.33	526,441.00	0.00	526,441.00	*	UNALLOCATED INSURANCE	1910
0.0	113,557.32	219,982.68	333,540.00	0.00	333,540.00	*	ADMINISTRATIVE CHARGE-BOCES	1981
15,227.2	146,947.80	238,309.93	400,485.00	-2,304.00	402,789.00	*	CURRICULUM DEVELOPMENT AND SUPERVISION	2010
76,838.0	529,789.95	1,399,885.19	2,006,513.19	-7,026.81	2,013,540.00	*	SUPERVISION - ADMINISTRATION	2020
49,267.0	0.00	5,733.00	55,000.00	30,000.00	25,000.00	*	RESEARCH, PLANNING AND EVALUATION	2060
10,375.3	9,000.00	2,924.65	22,300.00	0.00	22,300.00	*	INSERVICE TRAINING - INSTRUCTION	2070
1,640,190.1	8,612,314.33	13,372,091.46	23,624,595.90	-252,805.10	23,877,401.00	*	TEACHING - REGULAR SCHOOL	2110
20,710.6	4,069.43	36,891.79	61,671.86	-6,936.14	68,608.00	*	MUSIC & FINE ARTS	2138
1,176,398.0	6,054,834.11	6,929,078.85	14,160,311.00	3,918.00	14,156,393.00	*	PROGRAMS FOR HANDICAPPED CHILDREN	2250
11,934.8	671,127.81	627,711.20	1,310,773.82	-725.18	1,311,499.00	*	OCCUPATIONAL EDUCATION	2280
121,680.6	705,719.06	79,515.25	906,915.00	-625.00	907,540.00	*	COMMUNITY EDUCATION	2330
21,701.4	207,070.20	363,559.93	592,331.61	-6,666.39	598,998.00	*	SCHOOL LIBRARY AND AUDIOVISUAL	2610
497.2	0.00	17,438.75	17,936.00	17,018.00	918.00	*	EDUCATIONAL TELEVISION	2620
86,899.7	56,016.00	213,013.58	355,929.32	-12,105.68	368,035.00	*	COMPUTER ASSISTED INSTRUCTION	2630
5,672.0	9,971.50	32,980.50	48,624.00	0.00	48,624.00	*	ATTENDANCE - REGULAR SCHOOL	2805
10,046.4	493,928.92	879,652.40	1,383,627.80	141.80	1,383,486.00	*	GUIDANCE - REGULAR SCHOOL	2810

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Available	Encumbered	Expensed	Adj. Budget	Adjustments	Budget		Description	Account
51,624.04	194,452.80	354,502.69	600,579.53	79,555.53	521,024.00	*	HEALTH SERVICES - REGULAR SCHOOL	2815
2,235.50	106,494.71	151,753.79	260,484.00	4,000.00	256,484.00	*	PSYCHOLOGICAL SERVICES - REGULAR SCHOOL	2820
18,666.50	135,960.83	182,983.67	337,611.00	23,000.00	314,611.00	*	SOCIAL WORK SERVICES - REGULAR SCHOOL	2825
311,784.95	4,322.38	105,217.67	421,325.00	-175.00	421,500.00	*	CO-CURRICULAR ACTIVITIES - REG. SCHOOL	2850
457,431.35	137,850.94	330,438.45	925,720.74	3,714.74	922,006.00	*	INTERSCHOLASTIC ATHLETICS - REG. SCHOOL	2855
0.00	11,028.55	29,360.95	40,389.50	575.50	39,814.00	*	DISTRICT TRANSPORTATION SERVICES	5510
105,238.00	3,055,587.28	2,246,633.72	5,407,459.00	0.00	5,407,459.00	*	CONTRACT TRANSPORTATION	5540
295,439.25	0.00	700,483.75	995,923.00	0.00	995,923.00	*	NYS EMPLOYEES RETIREMENT	9010
3,322,372.28	0.00	63.72	3,322,436.00	0.00	3,322,436.00	*	NYS TEACHERS RETIREMENT	9020
1,322,593.20	0.00	1,733,945.80	3,056,539.00	0.00	3,056,539.00	*	SOCIAL SECURITY	9030
111,137.87	225,048.51	163,813.62	500,000.00	-100,000.00	600,000.00	*	WORKERS' COMPENSATION	9040
16,536.60	10,052.66	21,410.74	48,000.00	0.00	48,000.00	*	LIFE INSURANCE	9045
200.00	11,561.06	58,238.94	70,000.00	20,000.00	50,000.00	*	UNEMPLOYMENT INSURANCE	9050
2,441,774.39	1,843,563.59	7,425,674.14	11,711,012.12	207,751.12	11,503,261.00	*	HEALTH INSURANCE	9060
112,500.00	0.00	0.00	112,500.00	0.00	112,500.00	*	TAX ANTICIPATION NOTES	9760
2,283,190.37	0.00	248,190.63	2,531,381.00	0.00	2,531,381.00	*	TRANSFER TO SPECIAL AID	9901
0.00	0.00	751,500.00	751,500.00	350,000.00	401,500.00	*	CAPITAL IMPROVEMENTS	9950
14,730,837.54	25,934,795.96	45,305,335.98	85,970,969.48	1,384,369.48	84,586,600.00		Fund ATotals:	
14,730,837.54	25,934,795.96	45,305,335.98	85,970,969.48	1,384,369.48	84,586,600.00		Grand Totals:	

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ROCKY POINT UNION FREE SCHOOL DISTRICT FOR THE MONTH ENDED MARCH 2021

CAFETERIA FUND





Account	Description	Debits	Credits
C 207	CAPITAL ONE CHECKING	261,052.03	0.00
208	CHASE ACH REVENUE	252,857.76	0.00
380	ACCOUNTS RECEIVABLE	1,259.72	0.00
445	SUPPLY INVENTORY	10,774.35	0.00
446	GOVT FOOD INVENTORY	27,271.61	0.00
447	PURCHASED FOOD INVENTORY	23,514.19	0.00
510	ESTIMATED REVENUES	1,138,400.00	0.00
521	ENCUMBRANCES	306,513.27	0.00
522	EXPENDITURES	630,844.32	0.00
599	APPRORIATED FUND BALANCE	0.00	1,500.00
630	DUE TO GENERAL FUND	0.00	686,867.19
631	DUE TO OTHER GOVT.	0.00	5.29
632	DUE TO OTHER FUNDS	30,169.28	0.00
691	DEFERRED REVENUE	0.00	35,144.05
821	RESERVE FOR ENCUMBRANCES	0.00	306,513.27
845	FUND BALANCE RESERVE FOR INVENTORY	0.00	61,633.50
909	FUND BALANCE	0.00	52,282.37
960	APPROPRIATIONS	0.00	1,136,900.00
980	REVENUES	0.00	401,810.86
	C Fund Totals:	2,682,656.53	2,682,656.53
	Grand Totals:	2,682,656.53	2,682,656.53

Revenue Status Report From 7/1/2020 To 3/31/2021



Account	Description	Budget	Adjustments	Revised Budget	Revenue Earned	Unearned Revenue
<u>C 1440</u>	SALE OF TYPE A LUNCHES	250,000.00	0.00	250,000.00	6,974.25	243,025.75
C 1441	ADULT ALA CARTE	6,000.00	0.00	6,000.00	1,713.85	4,286.15
C 1445	OTHER CAFETERIA SALES	320,900.00	0.00	320,900.00	92,684.55	228,215.45
C 2401	INTEREST AND EARNINGS	1,000.00	0.00	1,000.00	147.32	852.68
C 2770	MISCELLANEOUS REVENUES	2,000.00	0.00	2,000.00	290,498.89	-288,498.89
C 2771	REBATES	1,500.00	0.00	1,500.00	555.00	945.00
C 3190	GOVERNMENT REIMB-STATE	17,000.00	0.00	17,000.00	366.00	16,634.00
C 4109	SURPLUS FOOD	75,000.00	0.00	75,000.00	0.00	75,000.00
C 4191	GOVERNMENT REIMB-FEDERAL	410,000.00	0.00	410,000.00	8,871.00	401,129.00
C 5031	Interfund Revenue	55,000.00	0.00	55,000.00	0.00	55,000.00
	C Totals	1,138,400.00	0.00	1,138,400.00	401,810.86	736,589.14
	Grand Totals	: 1,138,400.00	0.00	1,138,400.00	401,810.86	736,589.14



Appropriation Status Summary Report By Function From 7/1/2020 To 3/31/2021

Account	Description		Budget	Adjustments	Adj. Budget	Expensed	Encumbered	Available
2110		*	1,000.00	0.00	1,000.00	0.00	0.00	1,000.00
2860		*	1,080,900.00	0.00	1,080,900.00	600,130.89	306,513.27	174,255.84
9030		*	55,000.00	0.00	55,000.00	30,713.43	0.00	24,286.57
	Fund CT	otals:	1,136,900.00	0.00	1,136,900.00	630,844.32	306,513.27	199,542.41
	Grand Totals:		1,136,900.00	0.00	1,136,900.00	630,844.32	306,513.27	199,542.41

ROCKY POINT UNION FREE SCHOOL DISTRICT FOR THE MONTH ENDED MARCH 2021

FEDERAL FUND





Account	Description		Debits	Credits
F 205	CAPITAL ONE CHECKING		339,231.24	0.00
F 410	STATE AND FEDERAL AID REC		133,730.86	0.00
F 510	ESTIMATED REVENUES		1,339,453.75	0.00
F 521	ENCUMBRANCES		437,334.15	0.00
522	EXPENDITURES		817,760.56	0.00
630	DUE TO GENERAL FUND		0.00	805,632.50
632	DUE TO TRUST AND AGENCY		36,398.80	0.00
821	RESERVE FOR ENCUMBRANCES		0.00	437,334.15
960	APPROPRIATIONS		0.00	1,339,453.75
980	REVENUES		0.00	521,488.96
	F Fun	d Totals:	3,103,909.36	3,103,909.36
	Grand	d Totals:	3,103,909.36	3,103,909.36

Revenue Status Report From 7/1/2020 To 3/31/2021



Account	Description	Budget	Adjustments	Revised Budget	Revenue Earned	Unearned Revenue
F 3289.DEA.F	Schools for Blind & Deaf Students	0.00	0.00	0.00	21,413.87	-21,413.87
F 3289.SSH.21	REVENUE-SUMMER HCP 2020-2021	0.00	0.00	0.00	225,242.09	-225,242.09
F 3289.UPK.21	UPK REVENUE 2021	197,136.00	0.00	197,136.00	98,568.00	98,568.00
F 4126.TLI.20	REVENUE TITLE I	3,598.28	0.00	3,598.28	0.00	3,598.28
F 4126.TLI.21	REVENUE TITLE I	245,211.00	0.00	245,211.00	0.00	245,211.00
F 4256.PRE.21	REVENUE PRE	43,918.00	0.00	43,918.00	8,783.00	35,135.00
F 4256.PTB.21	REVENUE PTB	705,820.00	0.00	705,820.00	141,164.00	564,656.00
F 4289.ELL.20	REVENUE ELL	6,631.47	835.00	7,466.47	0.00	7,466.47
F 4289.ELL.21	REVENUE ELL	16,607.00	0.00	16,607.00	3,321.00	13,286.00
F 4289.SAE.21	REVENUE SAE 21	19,028.00	0.00	19,028.00	0.00	19,028.00
F 4289.TII.20	REVENUE TITLE IIA	36,153.00	0.00	36,153.00	22,997.00	13,156.00
F 4289.TII.21	REVENUE TITLE IIA	64,516.00	0.00	64,516.00	0.00	64,516.00
	F Totals:	1,338,618.75	835.00	1,339,453.75	521,488.96	817,964.79
	Grand Totals:	1,338,618.75	835.00	1,339,453.75	521,488.96	817,964.79

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Appropriation Status Summary Report By Function From 7/1/2020 To 3/31/2021

Account	Description	on	1	Budget	Adjustments	Adj. Budget	Expensed	Encumbered	Available
2110			*	587,980.75	1,735.00	589,715.75	296,911.79	208,733.96	84,070.00
2250			*	749,738.00	0.00	749,738.00	520,848.77	228,600.19	289.04
		Fund FTotals:		1,337,718.75	1,735.00	1,339,453.75	817,760.56	437,334.15	84,359.04
									- 1
	Grand Totals:			1,337,718.75	1,735.00	1,339,453.75	817,760.56	437,334.15	84,359.04

ROCKY POINT UNION FREE SCHOOL DISTRICT FOR THE MONTH ENDED MARCH 2021

CAPITAL FUND

Trial Balance Report From 7/1/2020 - 3/31/2021



Account	Description	Debits	Credits
H 205	CAPITAL ONE CHECKING	938,858.22	0.00
H 391	DUE FROM GENERAL FUND	500.00	0.00
H 410	DUE FROM STATE AND FEDERAL	160,665.00	0.00
1 510	ESTIMATED REVENUES	751,500.00	0.00
1 521	ENCUMBRANCES	1,670,463.97	0.00
1 522	EXPENDITURES	1,641,723.30	0.00
599	APPROPRIATED FUND BALANCE	3,882,896.65	0.00
691	DEFERRED REVENUE	0.00	1,039,679.70
821	RESERVE FOR ENCUMBRANCES	0.00	1,670,463.97
909	FUND BALANCE	0.00	950,566.82
1 960	APPROPRIATIONS	0.00	4,634,396.65
H 980	REVENUES	0.00	751,500.00
	H Fund Totals:	9,046,607.14	9,046,607.14
	Grand Totals:	9,046,607.14	9,046,607.14



Revenue Status Report From 7/1/2020 To 3/31/2021

Account	Description	3	Budget	Adjustments	Revised Budget	Revenue Earned	Unearned Revenue
H 5031	TRANFERS GENERAL FUND		0.00	751,500.00	751,500.00	751,500.00	0.00
		H Totals:	0.00	751,500.00	751,500.00	751,500.00	0.00
	Gra	and Totals:	0.00	751,500.00	751,500.00	751,500.00	0.00

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Appropriation Status Summary Report By Function From 7/1/2020 To 3/31/2021

Account	Description		P 1	Budget	Adjustments	Adj. Budget	Expensed	Encumbered	Available
1625			*	1,272,511.94	3,361,884.71	4,634,396.65	1,641,723.30	1,670,463.97	1,322,209.38
	Fund	HTotals:		1,272,511.94	3,361,884.71	4,634,396.65	1,641,723.30	1,670,463.97	1,322,209.38
	Grand Totals:			1,272,511.94	3,361,884.71	4,634,396.65	1,641,723.30	1,670,463.97	1,322,209.38

ROCKY POINT UNION FREE SCHOOL DISTRICT FOR THE MONTH ENDED MARCH 2021

TRUST AND AGENCY FUND





Account	Description	Debits	Credits
T 200EX	EXTRACLASSROOM	64,997.76	0.00
T 204	CAPITAL ONE TRUST & AGENCY	1,938,066.75	0.00
T 205	CAPITAL ONE NET PAYROLL	1,058,479.30	0.00
T 271	OTHER-TEA. RETIRE.	0.00	21.40
T 29	TAX SHELTER ANNUITY	0.00	1,660.00
T 290	AFLAC -CPP	0.00	5,302.01
Г 291	AFLAC - STD	0.00	2,487.74
Т 292	AFLAC - ACC	0.00	1,473.35
Г 293	AFLAC - HSP	0.00	805.82
Г 35	SCHOLARSHIP	0.00	1,050.00
Г 38	EXTRACLASSROOM ACTIVITY	0.00	64,997.76
Г 391	DUE FROM OTHER FUNDS	0.00	1,717,211.34
61	VISION	0.00	5.47
63001	DUE TO GENERAL FUND	0.00	1,205,508.85
84	OTHER-NYS EMPL RETIRE LOANS	0.00	4,163.95
Г 85	OTHER-NYS EMPL RETIRE	0.00	8,987.06
89	OTHER VOTE COPE	0.00	564.00
91	LONG TERM DISABILITY	143.31	0.00
931	SCHOOL ACTIVITIES-FJC	0.00	1,431.64
932	SCHOOL ACTIVITIES-JAE	0.00	886.99
933	SCHOOL ACTIVITIES-M/S	0.00	674.76
9331	HIGH SCHOOL TESTING	0.00	8,954.22
9335	NYSSMA	0.00	201.00
9337	AP TEST DEPOSITS	0.00	18,156.61
9338	MARK TWAIN DINNER	0.00	3,198.00
935	SCHOOL ACTIVITIES-H/S	0.00	12,606.50
9351	MUSIC DEPT. HIGH SCHOOL	0.00	313.65
9352	SEAN JOHNS MEMORIAL-CHALLENGE DAY	0.00	925.00
936	FJC - KIDS IN NEED (RUTH SPIEGEL)	0.00	100.00
	T Fund Totals:	3,061,687.12	3,061,687.12
	Grand Totals:	3,061,687.12	3,061,687.12

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ROCKY POINT UNION FREE SCHOOL DISTRICT FOR THE MONTH ENDED MARCH 2021

SCHOLARSHIP FUND





Account	Description	Debits	Credits
J 200	CASH IN CHECKING	50,092.68	0.00
J 2401	INTEREST	0.00	42.89
J 3912	DUE FROM GENERAL	732.09	0.00
J 630	DUE TO OTHER FUNDS	0.00	71.87
9000	ALLISON FISCH VERADO SCHOLARSHIP	0.00	0.51
9001	RITA SULLIVAN SCHOLARSHIP	0.00	231.74
9002	RYAN CAUFIELD SCHOLARSDHIP	0.00	24.18
9003	K EDWARDS ADMIN SCHOLARSHIP	0.00	1,650.89
9004	K-MART	0.00	83.36
9005	TARGET SCH HS/JR	0.00	44.34
9006	TARGET SCHOLARSHIP JAE	0.00	272.62
9007	TARGET SCHOLARSHIP	0.00	110.54
9008	FRANCIS RYAN SCHOLARSHIP	0.00	258.46
9009	GENERAL SCHOLARSHIP	0.00	313.88
9010	AL MAIN SCHOLARSHIP	0.00	4,517.75
9011	JOSEPH FALLICA	0.00	852.91
9015	SASBO SCHOLARSHIP	0.00	0.95
9016	SOUND BEACH MUSIC	0.00	0.95
9018	LIVE LIKE SUSIE MEMORIAL SCHOLARSHIP	0.00	28,920.07
9020	INTERDIST.COUNCIL OF SUPTS SR. SCHOL	0.00	61.07
9021	PETER MADDALENA MEMORIAL	0.00	8,523.93
9022	HAGGERTY MEMORIAL SCHOLARSHIP	0.00	4,545.86
9023	TEAM SCHOLARSHIP	0.00	296.00
	U Fund Totals:	50,824.77	50,824.77
	Grand Totals:	50,824.77	50,824.77

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ROCKY POINT UNION FREE SCHOOL DISTRICT FOR THE MONTH ENDED MARCH 2021

DEBT SERVICE FUND





Account	Description	Debits	Credits
V 200	CASH	117,046.89	0.00
V 3911	DUE FROM GENERAL	385.74	0.00
J 510	ESTIMATED REVENUE	2,411,381.25	0.00
J 522	EXPENDITURES	271,190.63	0.00
/ 599	APPROPRIATED FUND BALANCE	13,000.00	0.00
/ 909	FUND BALANCE, UNRESERVED	0.00	139,448.74
/ 960	APPROPRIATIONS	0.00	2,424,381.25
V 980	REVENUES	0.00	249,174.52
	V Fund Totals:	2,813,004.51	2,813,004.51
	Grand Totals:	2,813,004.51	2,813,004.51

Revenue Status Report From 7/1/2020 To 3/31/2021



Account	Description		Budget	Adjustments	Revised Budget	Revenue Earned	Unearned Revenue
V 2401	INTEREST EARNINGS		10,000.00	0.00	10,000.00	983.89	9,016.11
V 5031	INTERFUND TRANSFERS		2,401,381.25	0.00	2,401,381.25	248,190.63	2,153,190.62
		V Totals:	2,411,381.25	0.00	2,411,381.25	249,174.52	2,162,206.73
		Grand Totals:	2,411,381.25	0.00	2,411,381.25	249,174.52	2,162,206.73

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Appropriation Status Summary Report By Function From 7/1/2020 To 3/31/2021

Account	Descripti	on		Budget	Adjustments	Adj. Budget	Expensed	Encumbered	Available
9711			*	2,401,381.25	0.00	2,401,381.25	248,190.63	0.00	2,153,190.62
9901				23,000.00	0.00	23,000.00	23,000.00	0.00	0.00
		Fund VTotals:		2,424,381.25	0.00	2,424,381.25	271,190.63	0.00	2,153,190.62
	Grand Totals:			2,424,381.25	0.00	2,424,381.25	271,190.63	0.00	2,153,190.62

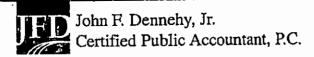
ROCKY POINT UNION FREE SCHOOL DISTRICT STUDENT ACTIVITY ACCOUNTS FOR THE MONTH ENDED MARCH 2021

Trial Balance Report From 7/1/2020 - 3/31/2021



Account	Description	Debits	Credits
X 201	CAPITAL ONE CHECKING	64,997.76	0.00
X 391	DUE FROM OTHER FUNDS	149.12	0.00
X 6307	LEADERS CLUB	0.00	62.73
X 6308	MATH HONOR SOCIETY	0.00	57.16
X 6309	VARSITY CLUB	0.00	5,313.84
C 6310	SCIENCE CLUB	0.00	327.06
(6311	SPACE CLUB	0.00	747.66
6351	STUDENT COUNCIL-MS	0.00	3,639.71
6353	YEARBOOK-MS	0.00	12,001.67
(6403	BUSINESS CLUB	0.00	14.11
(6404	MS ROBOTICS CLUB	0.00	153.29
(6452	BE A NICER NEIGHBOR CLUB	0.00	3,466.59
6454	COMMUNITY SERVICE CLUB	0.00	4,224.92
6457	SKILLS USA - HS COSMOTOLOGY	0.00	1,089.37
6460	GAY STRAIGHT ALLIANCE CLUB	0.00	0.0
6461	HUMAN RIGHTS CLUB	0.00	161.52
65010	S.A.D.D.	0.00	1,283.02
650115	THESPIAN TROUPE #696	0.00	210.51
65012	HS YEARBOOK CLUB	0.00	20,381.99
65016	STUDENT COUNCIL	0.00	6,814.40
65017	ART CLUB	0.00	1,399.48
65018	BUSINESS HONOR SOCIETY	0.00	808.87
65025	JAE STUDENT COUNCIL	0.00	2,054.25
6533	ROBOTICS CLUB HS	0.00	505.99
6540	HISTORY HONOR SOCIETY	0.00	175.06
6542	MATH TEAM	0.00	202.34
(700	SURPLUS FUNDS	0.00	51.33
	X Fund Totals:	65,146.88	65,146.88
	Grand Totals:	65,146.88	65,146.88

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April 6, 2021

Board of Education Rocky Point School District 90 Rocky Point-Yaphank Road Rocky Point, NY 11778

> Re: Internal Claims Audit Report for the period March 1, 2021 through March 31, 2021

Board of Education:

I have completed my internal claims auditing services for the Rocky Point School District covering the period March 1, 2021 through March 31, 2021. The services I performed, as outlined within my proposal, include reviewing all claims against the District. The purpose of this report is to update the Board of Education on work performed to date, my findings, and recommendations.

For ease of reference I have categorized the remainder of this report as follow:

Internal Claims Audit Services

Exhibits

INTERNAL CLAIMS AUDIT SERVICES

The internal claims audit services performed on each claim against the District consisted of:

- 1. Verification of the accuracy of invoices and claim forms
- 2. Ensuring proper approval of all purchases; checking that purchases constitute legal expenses of the school district
- 3. Determining that purchase orders have been issued in accordance with Board of Education policy, and applicable state laws

Board of Education Rocky Point School District Aptil 6, 2021

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Re: Internal Claims Audit Report for the time period of March 1, 2021 through March 31, 2021

- 4. Comparison of invoices or claims with previously approved contracts
- 5. Reviewing price extensions, claiming of applicable discounts, inclusion of shipping and freight charges
- 6. Approving all charges that are presented for payment which are supported with documentary evidence indicating compliance with all pertinent laws, policies and regulations

Over the time period of March 1, 2021 through March 31, 2021 I have audited 328 claims against the District in the amount of \$5.172.724.51. (See attached Exhibit I) I made inquiries and/or observations into 59 claims in the amount of \$295.600.30. I have summarized the inquiries and/or observations as well as the resolutions within Exhibit II. It should be noted that currently, there are 0 outstanding inquiries in regards to the audit of the claims made against the District for the period of March 1, 2021 through March 31, 2021. I have summarized all voided checks and notable exceptions in Exhibit III.

I trust that the foregoing comments are clear. If you have any questions or you would like to discuss this matter further, please contact me at 63 I-928-5406.

Very truly yours,

John F. Dennehy Jr. Certified Public Accountant

Internal Claims Audit By Fund

Rocky Point School District

Exhibit I

Warrant Date	Audit Date	Warrant#	Fund	# of Checks	\$ Value of Checks	# of Inquiries	\$ Value of Inquiries	# of Resolved Inquiries	# of Outstanding Inquiries	Check Sequence
3/3/2021	3/3/2021	46	A	64	276,260.95	13	164,127.06	13	•	115225-115288
/10/2021	3/10/2021	48	A	40	135,037.75	11	22,633.48	11		115289-115328
	3/17/2021	49	A	66	1,154,106.45	16	63,446.22	16		115329-115393
	3/24/2021	51	A	39	198,418.39	7	25,708.26	7	-	115394-115432
3/3/2021	3/3/2021	22	C	15	17,628.99	5	7,775.03	5	-	12105-12119
	3/10/2021	23	C	9	4,636.75	2	1,222.75	2		12120-12128
	3/17/2021	24	C	15	10,115.27	2	300.00	2	-	12129-12143
	3/24/2021	25	C	12	10,736.86	1	267.50	1	-	12144-12155
	3/10/2021	13	F	2	19,610.00	1	9,010.00	1	-	4588-4589
	3/24/2021	14	F	1	5,900.00		-	-	-	4590
3/3/2021	3/3/2021	36	T	5	11,025.99	-				13070-13074
3/5/2021	3/5/2021	37	T	26	1,662,617.86	-			-	13075-13081,
	3/10/2021	38	т	1	3,390.00			_		5115819-5115837 13082
	3/17/2021		Ť	28	1,647,151.55	1	1,110.00	1	• -	13083-13090, 5115838-5115856
3/24/2021	3/24/2021	40	T	4	15,622.14	-			#T	13091-13094
	3/24/2021		X	1	465.56			•	-	11354
	TAL			328	\$ 5,172,724.51	59	\$ 295,600.30	59	·	

	egend:
A - General	P (A) - Chase General
C - Cafeteria	T-Trust & Agency
F - Federal	HB - Bond 2003
H - Capital	CM- Misc Spec Revenue
HCP - Capital Projects	TE-Expendable Trust

^{*}Due to current work conditions, payment to vendor was made by EFT and recorded as a Journal Entry. Therefore there is no check number or warrant number.

Rocky Point School District Chims Audit - Avalust by Number of Inquires & Doller Value Summary of Inquiries / Resolutions and Percenture of Total Chims & Doller Value of Calus Exhibit II

2020 / 2021 YTD

April	sia by	Number	of Inc	wires.

Remon For Inquiry	Beachetion	lead1	B-b-XI	Marsh	Apr-91	Maral	No. 21
Il invoices not reflected on check	Pay ampaid insoiceful next warrant	1 0.366	- 0.00K	- 0.00%	- ADIVA	- ebivja	. «DSV/ci
beek amount not equal to izvoices	Difference S; Immaterial, claim paid	- 0.004	- 0.00%	- 0.00#	- ADITYO	. sprva	. ADEVJOI
heck amount not equal to invoices	Overpaid recurring wendor by less than	- 0.035	- 0.00%	. a.cops	· PDFSQ	- ADTV/CI	· ADIVICE
	\$100; credit will be taken off on next						
	payment to vendor				54064		
Check amount not equal to involces	Void & misson	2 0.656	. e.oux	- aoa	- «DIVIO	- EDIVA	- 6011/0
Theek issued prior to service	Void & reisson at time of service	- 0.004	- 0.00%	- a.oom	. 100,000	- ADJVAN	- VDIVIO
Oredit not taken	Recurring windom credit memo pulled from	. 4.00	. a.cos	- 0.00%	- POSVA	. «DEV/XX	- VDEVICE
	pocket to apply to next invoice						200000000000000000000000000000000000000
Current year expense paid prior year P.O.	P.O. Punds curied over	. 0.00	1 o'Chr	1 0.504	- NOSYRON	- 4017/0	- PDIVIN
Duplicate payment	Check wold by AP	- a.com	. 0.00%	- 0.00%	- ADTHOR	- 1017/0	. #237909
Incorrect wendor name	Void & reinne	- 0.00%	. 6.00x	- 0.00%	- MONOO	- <i>EDEV/O</i>	- EDIVA
losufficient supporting backup	Hold for mining information	. a.com	- 0.00	- 0.00%	- ADIVO	- <i>(DFV)Q</i>	· «DIVA
Insufficient supporting backup	Backup Provided	- 0.0%	. 0.006	1 0.50%	- EDIVIS	- KDEVA	- #DEV/OF
Insufficient supporting backup	Void check	- 0.00%	- 0.000	. 0.000	- aprop	- KDEVIO	- <i>40590</i>
Envoice date precodes PO date	Noted by Business Office	17 S.Ebs	6 82%	22 6.72%	· PDIV/G	- IDIV/O	- ADEVIU
Invoice over 90 days centranding/undated	Verified no doplicate payment	9 days	8 4.536	13 2036	. sprva	- PDFV/CI	· ODIVA
Invoices not fisted separately on check	Void and reisone with all invoices itemized	- 0.004	. 0.00%	1 0.50%	- epivja	- IDIVA	. apropa
	separately						
Invoice previously stamped by claims auditor	Confirmed original check word	1 0,806	1 0.526	1 0.50%	- EDIVAL	- FDIVIT	ADIV/CI
Missing administrator approval endorsement	Received proper authorization	- 0.00m	- 0.00m	. 0.00%	- 40/7/01	- aprojo	- aprija
Missing receiving signature on invoice or PO	Verified receipt of goods/survices	- 0.00%	- 0.004	. 0.006	- EDIVA	- 67277/01	- ADEVIO
No Purchase Order encumbered	Void & seissne after P.O. encumbered	- 0.00%	. a.eos	- 0.00%	- ADIVIDI	- ADTYRI	- #20,TV/POF
Not an original invoice	Copy, fax or statement accepted	9 300	5 2.67%	10 3475	- MITTAKE	. ADRIVA	· addivida
Paid sales tax	Void and reissun	. a.ook	- 0.00%	. 0.00%	- ADIVIO	· ACHTON	. ADTV/CI
PO insufficient funds	PO funds increased post invoice/paid direct	9 3.086	7 8.76s	9 2704	. apsylor	- 40.57/01	· aprija
	from bodges ende						
Prior year invoice paid current year funds	Noted by Business Office	3 1.00%	. 0.00	1 0306	. ADIVO	- ADDIVE	· sprva
Pre-dated Invoice	Hold until service date	- 0.004	. 0.608	- 0000	. ADITYOT	· GOTVA	. ADTYO
Separation of Duties	Same individual signed P.O. and authorized	- 0.000	- 0.00%	- 2006	. ADITY/OI	- IDINA	- ADIVA
•	payment; additional admin approval						
	provided						
Prepoid Invoice - Improper Procedure	Vender requires propayment; advised in	. 0.00%	1 0.594	- 6.00%	. EDITYO	- ADR/O	. «DRVO
	future to relect a different wender				CONTRACTOR OF STREET	A 10 (10 (10 (10 (10 (10 (10 (10 (10 (10	
Total Number (f) of Inquiries		51 17.0%	29 ILER	59 17.504	- ADIVA	- POLVA	· sprya
Total Claims Audited	Darwan Telegram	292 100.00x	187 ranges	228 rozen	- 40000	- 10.000	- 10,19701
Total Outstanding Inquiries	 	0 0.00%	6 0.00%	0 0.00%	0 #DIV/O	0 €DIV/9	0 #Dr

Rocky Point School District China Ardit - Analysis by Number of Inquisits & Dollar Yaloo Summary of Inquisies / Resolutions and Propostage of Tatal China & Rollar Yaloo of China Eshibit II

2020 / 2021 XTD

nalysis by Dollar Value cason For Loguist	Resolution	170-XI		F-5-81		H-c/L		April		<u> </u>		1हिस्सी	
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ends amount and count to involves	Overpaid ecouping worder by less than		0.000		(7.40 0 4		0.000		COTYXX	-	ADIVAD		<i>(10)</i> / / (10)
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	payment to vendor												
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rafit not taken	Recurring wooder; crafts memo pulled from	-	0.004		accor.	•	C026	•	apriço	•	82117CY	•	42170
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nonflower comporting backup	Hold for missing information	_	O.COM	-	0.026	-	COOK		anda	•	<i>4</i> 201707		4017
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recipes over no chips constructly on check	Void and reason with all invoices incurred		Q.COM	•	4.004	177.65	400%		rprya	•	ADJ VICE		DIT/
Market and many activities in our contra	separately												
needen previously stanmed by claims studies	Confirmed original check word	717.68	garys	659,725,18	11,434	L310.00	0.035		entya		essentinos.		. Interes
	Received proper authorization	•	ans.		0.024		4000		en ryn		CO POOT		ADJIV.
Anning administrator expressal endorsement Vission receiving algorithms on invoice or PO	Verified receipt of mode/services		G.00x	_	6.00 <u>m</u>		4004		(DIV)O	-	eDF/A		AUTO
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Separation of Duties	Same individual signed P.O. and emborized	•	900	•	e-crise	-	-	-	-24 714	-	-2417-		
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Total Value (i) of Inquiries		669,400.5	(LEC)II	704,579,05	E100%	250,009.20	₩,	•	ADJV/CI	•	STATEME	•	- ALTH
Total China Anditol		8,062,088.85	taxaan	5,834,985,97	100.00x	5,179,784.51	100,005	<u> </u>	eDT/707	<u>-</u>	enryte		£2517
Total Outstanting Incoderes			0.00%		0.00%		0.004		FULVA		(DIV/C	a -	. ,

Rocky Point School District Infernal Claim Audit Notable Exceptions Exhibit IV

Volded Checks - March 2021

				•	Worzant		
Pand	Ck#	Amount \$	Vendor	Warrant ₽	Date	Reason For Inquiry	Resolution
A	115323	222.86	Tri-State Sound	4.8	3/10/2021	Invoices not listed separately on check	Invoices 13512 and 13513 entered on warrant as 1 invoice; vold and reissue.
		-					
1		-					
Total	1 Vold	222,86					

Other Notable Exceptions - March 2021

					Warrant		
Fond	Ck 0	Amount \$	Vendor	Warrant 9	Date	Reason For Inquiry	Resolution
None		-					
			· · · · · · · · · · · · · · · · · · ·				
Total	0 Inquirles	-					

Rocky Point School District Internal Claims Audit Payroll Audit Exhibit IV

Audited Payroll Checks - March 2020

Fund	Ck#	Amount \$	Employee	Payroll Date	Exceptions	
PR	298702	659.82	Robert Szymanski	3/5/2021	None	
PR	298765	2,362.43	Christine Edmonds	3/5/2021	None	
PR	298819	205.20	Isabel R Badal	3/5/2021	None	
PR	298931	768.31	Christine Quaranta-Russell	3/5/2021	None	
PR	299054	2,461.65	Scott Lindsay	3/5/2021	None	
PR	299287	2,151.27	David Cook	3/19/2021	None	
PR	299307	2,578.20	Tara Black	3/19/2021	None	
PR	299358	2,885.08	Jason R Westerlund	3/19/2021	None	
PR	299433	3,091.02	Elizabeth P Mancini	3/19/2021	None	
PR	299439	2,883.61	Patricia Nesbitt	3/19/2021	None	
-		20,046.59				

^{*}Please note all checks have been selected at random using a random number generator.

^{**}A result of no exceptions means that the the payroll check is accurate when compared against contracts, renewal letters and other documents.

Interoffice Memorandum

TO:

Dr. Scott O'Brien, Ed.D

FROM:

Kristen White, Executive Director of Pupil Personnel

DATE:

April 6, 2021

RE:

Board Action Sheets

Below please find the schedule to be approved at the April 20, 2021 Board of Education meeting:

	SCHEDULE-	A 4/20/2021
Year	Date	Location
2020-2021	February 26, 2021 thru March 25, 2021	CSE & SCSE meetings conducted for students attending in-district and out of district placements
2021-2022	February 26, 2021 thru March 25, 2021	Annual Review meetings for students attending in-district and out of district placements
2020-2021	February 26, 2021 thru March 25, 2021	CSE District Wide Amendments without meetings

CMA BOE Date	CR Doc Committee Responsible	CMA Reason	Decision/Stat	tus CMA Date	CR Expecte Grade	CR Next ad Recommender School	Program d	Program Start	Program End	Program Ratio	Program Program Frequency Period	Program Program Duration Location	Related Service	RS Start	RS End	RS Ratio	RS RS Frequency Period	Duratio
					Name (Control of	School (>2010-11 SY)												
14/20/2021	CSE	Program Review	Classified	02/13/2020	0 0 2		Integrated Co- teaching Services	d 09/02/2020	0 06/25/2021		6 Dally	40 Classroom	Occupational Therapy	09/14/202	0 06/18/20	21 Small Group (5:1)	2 Weekly	3
		Program Review	Classified		02			d 09/02/2020	0 06/25/2021		6 Dally	40 Classroom	Counseling-Social Skills Counseling	09/14/202	0 06/18/20	Group (5:1)	1 Weekly	:
		Program Review	Classified		02			1 09/02/2020	0 06/25/2021		6 Daily	40 Classroom	Parent Counseling and Training	09/14/202	0 06/18/20	21 Small Group	4 Yearty	•
		Amendment - Agreement No Meeting	Classified	10/14/2020	01		Special Class	09/02/2020	06/25/2021	12:1+1	6 Dally	40 Classroom	Speech/Language Therapy	03/24/202	1 06/15/20	21 Small Group (5:1)	1 Weekly	:
		Amendment - Agreement No Meeting	Classified		01		Special Class	09/02/2020	06/25/2021	12:1+1	6 Dally	40 Classroom	Speech/Language Therapy	03/24/202	1 06/15/20	21 Individua	1 Weekly	;
		Amendment - Agreement No Meeting	Classified		01		Special Class	09/02/2020	06/25/2021	12:1+1	6 Dally	40 Classroom	Parent Counseling and Training		0 06/15/20	Group	4 Yearty	•
		Requested Review	Classified	02/23/2021	03		Special Class	09/02/2020	06/25/2021	15:1	6 Daily	40 Classroom	Intervention Services		1 06/18/20			
		Requested Review	Classified		03		Special Class	09/02/2020	06/25/2021	15:1	6 Daily		Speech/Language Therapy					
		Requested Review	Classified		03		Special Class	09/02/2020	06/25/2021	15:1	6 Daily	40 Classroom	Speech/Language Therapy			Group (5:1)	2 Weekly	
		Requested Review	Classified		03		Special Class	09/02/2020	06/25/2021	15:1	6 Dally	40 Classroom	Therapy		0 06/22/20			
		Requested Review	Classified		03		Special Class	09/02/2020	06/25/2021	15:1	6 Dally	40 Classroom	Occupational Therapy	09/08/202	0 06/22/20	21 Small Group (5:1)	2 Weekly	
		Requested Review	Classified		03		Special Class	09/02/2020	06/25/2021	15:1	6 Daily	40 Classroom	Physical Therapy	09/08/202	0 06/22/20	21 Individua		
		Requested Review	Classified		03		Special Class	09/02/2020	06/25/2021	15:1	6 Daily	40 Classroom	Counseling-Social Skills Counseling			(S:1)	1 Weekly	
	ž	Requested Review	Classified		03		Special Class	09/02/2020	06/25/2021	15:1	6 Daily	40 Classroom	Counseling and Training		0 06/18/20	Group	4 Yearty	
		Initial Eligibility Determination Meeting	Classified	02/24/2021	02								Speech/Language Therapy			Group (S:1)	2 Weekly	
		Program Review	Classified	02/25/2021	02		Special Class	09/02/2020	06/25/2021	15:1	6 Daily	40 Classroom	Speech/Language Therapy	09/14/202	0 06/18/20	21 Individua		
		Program Review	Classified		02		Special Class	09/02/2020	06/25/2021	15:1	6 Daily	40 Classroom	Counseling-Social Skills Counseling	09/14/202	0 06/18/20	21 Small Group (5:1)	1 Weekly	
		Initial Eligibility Determination Meeting	Classified		08		Special Class - Math	03/09/2021	06/25/2021	15:1	5 Weekly	42 Math Class	Counseling	03/09/202	1 06/15/20	21 Individue		
		Initial Eligibility Determination Meeting	Classified		08		Special Class - English	03/09/2021	06/25/2021	15:1	5 Weekly	42 Math Class	Counseling		21 06/15/20			
		Initial Eligibility Determination Meeting	Classified		ОВ		Special Class - Social Studies	03/09/2021	06/25/2021	15:1	5 Weekly	42 Classroom	Counseling	03/09/20	21 06/15/20	21 Individua	al 1 Monthly	,
		Initial Eligibility Determination Meeting	Classified		08		Special Class - Science	03/09/2021	06/25/2021	15:1	S Weekly	42 Science Class	Counseling	03/09/20	21 06/15/20	21 Individua	d 1 Monthly	
		Reevaluation/Annua Review	l Classified	03/01/2021	Kdg.		Special Class	09/02/2020	06/25/2021	15:1	6 Daily	40 Classroom	Speech/Language Therapy	e 09/14/202	0 06/18/20	21 Individua	al 1 Weekly	
		Reevaluation/Annua Review	l Classified		Kdg.		Special Class	09/02/2020	06/25/2021	15:1	6 Dally		Speech/Language Therapy			Group (5:1)	2 Weekly	
		Reevaluation/Annua Review	l Classified		Kdg.		Special Class	09/02/2020	06/25/2021	15:1	6 Dally	40 Classroom	Counseling-Social Skills Counseling			Group (5:1)	1 Weekly	
		Reevaluation/Annua Review	Classified		Kdg.		Special Class	09/02/2020	06/25/2021	15:1	6 Dally	40 Classroom	Occupational Therapy	10/15/20	20 06/18/20	21 Small Group (5:1)	2 Weekly	

											127023	
Reevaluation/Annua	al Classified	Kdg	ş. ş	pecial lass	09/02/2020 06/25/2021 15:1	6 Dally	40 Classroom	Physical Therapy	03/15/2021 06/18/2021	Individual	2 Weekly	30
Review Progress Review	Classified	03/02/2021 Kdg	p. Ir	ntegrate o- eaching	d 09/08/2020 06/25/2021	6 Dally	40 Classroom	Speech/Language Therapy	09/08/2020 06/25/2021	Individual	2 Weekly	30
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Progress Review	Classified	Kdg	C te	ntegrate o- eaching ervices	d 09/08/2020 06/25/2021	6 Daily	40 Classroom	Speech/Language Therapy	99/14/2020 06/25/2021	Group (5:1)	1 Weekly	30
Progress Review	Classified	Kdg). Ir		d 09/08/2020 06/25/2021	6 Dally	40 Classroom	Occupational Therapy	09/08/2020 06/25/2021	. Individual	2 Weekly	30
Program Review	Classified	Kdg			d 09/02/2020 06/25/2021	6 Daily	40 Classroom	Counseling and	03/02/2021 06/18/2021	Small Group	2 Yearly	60
				aching				Training				
Program Review	Classified	Kdg). In Co		d 09/02/2020 06/25/2021	6 Daily	40 Classroom	Occupational Therapy	09/08/2020 06/22/2021	Small Group (5:1)	2 Weekly	30
Program Review	Classified	Kdg). In Co te	tegrate o- aching	d 09/02/2020 06/25/2021	6 Daily	40 Classroom	Physical Therapy	03/01/2021 06/22/2021	Individual	2 Weekly	30
Program Review	Classified	Kdg	ı. In	0-	d 09/02/2020 06/25/2021	6 Dally	40 Classroom	Counseling-Social Skills Counseling	09/14/2020 06/18/2021	Small Group (5:1)	1 Weekly	30
				aching						(3:1)		
Program Review	Classified	05	In Co te	tegrate o- aching	d 09/02/2020 06/25/2021	6 Dally	40 Classroom					
Requested Review	Classified	04		ervices	d 09/02/2020 06/25/2021	6 Dally	40 Classroom	Speech/Language	09/14/2020 06/18/2021	Individual	3 Weekly	30
Requested Review	Classified	04	Co		0 03/02/2020 00/23/2022	7 24.1,		Therapy				
Program Review	Classified	04	Co		d 09/02/2020 06/25/2021	6 Daily	40 Classroom					
Program Review	Classified	03/03/2021 09	S	pecial lass - ngtish	09/25/2020 06/25/2021 15:1	5 Weekly	42 English / Language Arts Class	Counseling	09/25/2020 06/15/2021	I Individual	1 Weekly	30
Program Review	Classified	09	si	ecial ass - ath	09/02/2020 06/25/2021 15:1	5 Weekly	42 Math Class	Counseling	09/25/2020 06/15/2021	I Individual	1 Weekly	30
Program Review	Classified	09	St	ecial ass -	09/02/2020 06/25/2021 15:1	5 Weekly	42 Science Class	Counseling	09/25/2020 06/15/2021	Individual	1 Weekly	30
Program Review	Classified	09	Ci Sc	ecial ass - ocial cudies	09/25/2020 06/25/2021 15:1	5 Weekly	42 Social Studies Class	Counseling	09/25/2020 06/15/2021	I Individual	1 Weekly	30
Transfer Student - Agreement No Meeting	Classified	03/04/2021 07	S	ecia! ass	03/08/2021 06/24/2021 8:1+1	5 Weekly	360 Separate	Psychological Counseling Services	03/08/2021 06/24/2021	I Individual	2 Weekly	30
Transfer Student - Agreement No Meeting	Classified	07		ecial ass	03/08/2021 06/24/2021 8:1+1	5 Weekly	360 Separate	Psychological Counseling Services	03/08/2021 06/24/202	Group (5:1)	1 Weekly	30
Requested Review	Classified	03/08/2021 Kdg		pecial	09/02/2020 06/25/2021 12:1+1	6 Daily	40 Classroom	Speech/Language Therapy	09/14/2020 06/18/202	1 Individual	1 Weekly	30
Requested Review	Classified	Kdg	. St	ass secial ass	09/02/2020 06/25/2021 12:1+1	6 Dally	40 Classroom	Occupational Therapy	09/08/2020 06/22/202	1 Small Group (5:1)	1 Weekly	30
Requested Review	Classified	Kdg		ecial ass	09/02/2020 06/25/2021 12:1+1	6 Daily	40 Classroom	Counseling-Social Skills Counseling	09/14/2020 06/18/202		1 Weekly	30
Requested Review	Classified	Kdg	. Sı	ecial ass	09/02/2020 06/25/2021 12:1+1	6 Daily	40 Classroom	Parent Counseling and Training	03/08/2021 05/18/202	I Small Group	2 Yearly	60
Amendment - Agreement No Meeting	Classified	10	Co	aching	d 09/02/2020 06/15/2021	5 Weekly	42 English / Language Arts Class					
	221	10000		rvices		E secondo.	43 Science					
Amendment - Agreement No Meeting	Classified	10	Co		d 09/02/2020 06/15/2021	5 Weekly	42 Science Class					
Amendment -	Classified	10			09/02/2020 06/15/2021	5 Weekly	42 Social					
Agreement No Meeting			Co				Studies Class					

			Services					
Amendment - Agreement No Meeting	Classified	10	Special 03/08/2021 06/15/2021 15:1 Class - Math	5 Weekly	42 Math Class			
Amendment -	Classified	10	Integrated 09/02/2020 06/25/2021	5 Weekly	42 English /			
Agreement No Meeting			Co- teaching	575.5595.369-45555 € 7	Language Arts Class			
riccing			Services		Arts Class			
Amendment - Agreement No Meeting	Classified	10	Special 09/02/2020 06/25/2021 15:1 Class - Math	5 Weekly	42 Math Class			
Amendment - Agreement No Meeting	Classified	10	Integrated 09/02/2020 06/25/2021 Co- teaching Services	5 Weekly	42 Science Class			
Amendment -	Classified	10	Integrated 09/02/2020 06/25/2021	5 Weekly	42 Social			
Agreement No Meeting			Co- teaching Services		Studies Class			
Teacher Request	Classified	03/09/2021 Kdg.			Speech/Langu Therapy	age 09/14/2020 06/18/2021 Small Group (5:1)	2 Weekly	30
Teacher Request	Classified	Kdg.	(a)		Counseling-So Skills Counsell	cla! 09/14/2020 06/18/2021 Small	1 Weekly	30
Initial Eligibility Determination Meeting	Classified	03/10/2021 01	Integrated 03/19/2021 06/25/2021 Co- teaching Services	6 Dally	40 Classroom Speech/Langu Therapy	age 03/19/2021 06/15/2021 Small Group (5:1)	2 Weekly	30
Requested Review	Classified	03/11/2021 01	Integrated 09/02/2020 05/25/2021 Co- teaching Services	6 Daily	40 Classroom Occupational Therapy	09/14/2020 06/18/2021 Small Group (5:1)	2 Weekly	30
Requested Review	Classified	01	Integrated 09/02/2020 06/25/2021 Co- teaching Services	6 Daily	40 Classroom Counseling-So Skills Counseli	cial 09/14/2020 06/18/2021 Small group (5:1)	1 Weekly	30
Requested Review	Classified	01	Integrated 09/02/2020 06/25/2021 Co- teaching Services	6 Dally	40 Classroom Parent Counseling an Training	09/02/2020 06/18/2021 Small d Group	4 Yearly	60
Amendment - Agreement No Meeting	Classified	03/12/2021 07	Integrated 09/02/2020 06/25/2021 Co- teaching Services	5 Weekly	42 English / Counseling Language Arts Class	09/14/2020 06/15/2021 Individual	1 Weekly	30
Amendment - Agreement No Meeting	Classified	07	Integrated 09/02/2020 06/25/2021 Co- teaching Services	S Weekly	42 Math Class Counseling	09/14/2020 06/15/2021 Individual	1 Weekly	30
Amendment - Agreement No Meeting	Classified	07	Integrated 09/02/2020 06/25/2021 Co- teaching Services	5 Weekly	42 Science Counseling Class	09/14/2020 06/15/2021 Individual	1 Weekly	30
Amendment - Agreement No Meeting	Classified	07	Integrated 09/02/2020 06/25/2021 Co- teaching Services	5 Weekly	42 Social Counseling Studies Class	09/14/2020 06/15/2021 Individual	1 Weekly	30
Amendment - Agreement No Meeting	Classified	03/15/2021 06	Integrated 09/23/2020 06/25/2021 Co- teaching Services	5 Weekly	42 Science Class			
Amendment - Agreement No Meeting	Classified	06	Special 12/15/2020 06/25/2021 15:1 Class - Math	5 Weekly	42 Math Class			
Amendment - Agreement No Meeting	Classified	06	Special 12/15/2020 06/25/2021 15:1 Class - Reading	S Weekly	42 English / Language Arts Class			
Amendment - Agreement No Meeting	Classified	03/17/2021 04	Special 03/17/2021 06/25/2021 8:1+1 Class	S Weekly	360 All Psychological Academic Counseling Classes Services	03/17/2021 06/25/2021 Small Group	1 Weekly	30
Amendment - Agreement No Meeting	Classified	04	Special 03/17/2021 06/25/2021 8:1+1 Class	5 Weekly	360 All Psychological Academic Counseling Classes Services	03/17/2021 06/25/2021 Individual	1 Weekly	30
Program Review	Classified	08	Special 09/08/2020 06/25/2021 8:1+1 Class	S Weekly	360 Across All Psychological Educational Counseling Settings Services	09/08/2020 06/25/2021 Small Group	1 Weekly	30
Program Review	Classified	11	Special 09/08/2020 06/25/2021 12:1+1 Class - Math	1 Daily		oge 09/08/2020 06/25/2021 Small Group (5:1)	2 Weekly	30
Program Review	Classified	11	Special 09/08/2020 06/25/2021 12:1+1 Class - Math	1 Daily	42 Math Class Counseling-Soc Skills Counselin	ial 09/08/2020 06/25/2021 Small	1 Weekly	30
Program Review	Classified	11	Special 09/08/2020 06/25/2021 12:1+1	2 Weekly	42 Science Speech/Langua	ige 09/08/2020 06/25/2021 Small	2 Weekly	30

Second Review Calculation				Class -			Class	Therapy		Group		
Purpose Purp	Program Review	Classified	l1	Special Class -	09/08/2020 06/25/2021 12:1+1	2 Weekly			09/08/2020 06/25/2021	Group	1 Weakly	30
Property Note Property Not	Program Review	Classified	11	Special Class - Social	09/08/2020 06/25/2021 12:1+1	I Cally	Studies		09/08/2020 06/25/2021	Small Group	2 Weekly	30
Program Review Classified	Program Review	Classified	11	Special Class - Sodal	09/08/2020 06/25/2021 12:1+1	I Cally	Studies			Group	1 Weekly	30
Property Review Character	Program Review	Classified	11	Special Class -		1 Dally	Language			Group	2 Weekly	30
Processing Pro	Program Review	Classified	11	Special Class -		1 Daily	42 English / Language		09/08/2020 06/25/2021	SmeII Group	1 Weekly	30
Case	Agreement No	Classified	03/22/2021 10	Ciass -	09/02/2020 06/15/2021 15;1	S Weekly	42 Moth Class	Counseling			1 Weekly	30
Agreement No	Agreement No	Classified	10	Class -		5 Weekly	Language	Counseling	09/14/2020 06/15/2021	Individual	1 Weckly	30
Agreement No Properties Classified Gly24/2011 Kdp Gly34/2011 Kdp	Agreement No	Classified	10	Ciass - Social		5 Weekly	Studies	Counseling	09/14/2020 06/15/2021	Individual	1 Weekly	30
Agreement No Program Review Progra	Agreement No	Classified	10	Class -		5 Weekly		Counseling	09/14/2020 06/15/2021	lsublyibni	1 Weekly	30
Case	Agreement No	Classified	03/24/2021 Kdg.						03/12/2021 06/18/2021	Individual	3 Weekly	5
Classified Cla	Agreement No	Classified	02		09/08/2020 06/25/2021 12:1+1	6 Da∄ y	40 Classroom			Group	1 Weekly	30
Agreement No Colors Colo	Agreement No	Classified	02		09/08/2020 06/25/2021 12:1+1	6 Dally	40 Classroom		09/14/2020 06/18/2021	Individual	1 Weckly	30
Classified Classified Classified Classified Classified Class Cla	Agreement No	Classified	02		09/08/2020 06/25/2021 12:1+1	6 DaQy	40 Classroom		09/08/2020 06/22/2021	Individual	2 Weekly	30
Determination	Agroement No	Classified	03		09/08/2020 06/25/2021 12:1+1	6 DaQy	40 Classroom	Counseling and			4 Yearly	60
Agreement No Meetling	Determination	Classified	04		03/26/2021 06/25/2021 15:1	6 Dally	40 Classroom	Speech/Language Therapy	-	Group	2 Weekly	30
Agreement No Meetling	Agreement No	Classified	03/25/2021 07		09/08/2020 06/25/2021 8:1+1	5 Weckly	330 Classroom	Behavioral	09/08/2020 06/25/2021	Individual	4 Wackty	60
Agreement No Meeting Classified O2 Special O4/08/2021 06/25/2021 8:1+1 1 Delity 360 Classroom Occupational Therapy O4/08/2021 06/25/2021 Individual 1 Weekly 30 Classroom Occupational Therapy O4/08/2021 06/25/2021 Individual 1 Weekly 30 Classroom Occupational Therapy O4/08/2021 06/25/2021 Small Group O4/08/2021 06/25/2021 Small O4/08/2021 06/25/2021	Agreement No	Classified			09/08/2020 06/25/2021 8:1+1	5 Weekly	330 Classroom	Speech/Language Therapy	09/08/2020 06/25/2021	Individual	3 Weekly	30
Program Review Classified O2 Special Class O4/08/2021 06/25/2021 8:1+1 1 Daily 360 Classroom Cocupational Thurapy O4/08/2021 06/25/2021 Small Group (5:1) 1 Weekly 30 Classroom Parent Counseling and Training O4/08/2021 06/25/2021 Small Group (5:1) O4/08/2021 06/25/2021 Small Class O4/08/2021 06/25/2021 Small Class O4/08/2021 06/25/2021 Small Class O4/08/2021 06/25/2021 Small Class O4/08/2021 06/25/2021 Small O4/	Agreement No	Classified			09/08/2020 06/25/2021 8:1+1		330 Classroom	Physical Therapy	69/08/2020 06/25/2021	Individual	1 Weekly	30
Program Review Classified O2	Program Review	Classified	02		04/08/2021 06/25/2021 8:1+1	1 Daily	360 Classroom		04/08/2021 06/25/2021	Individual	1 Weekly	30
Class Counseling and Training Class Cl	Program Review	Classified	02		04/08/2021 06/25/2021 8:1+1	1 Daily	360 Classroom	Occupational		Group	1 Weekly	30
Review Revaluation Review Declassified 02 Revaluation Review Declassified 03/09/2021 01 Revaluation Review Declassified 03/25/2021 01 Revaluation Review Declassified 03/25/2021 01 Review Declassified 03/25/2021 01 Review Declassified 03/25/2021 01 Review Declassified 01/29/2021 08 Review Review Annual Review Declassified 01/29/2021 08 Resource Room Program Program Representation Review Declassified 01/29/2021 08 Resource Room Program	Program Review	Classified	02		04/08/2021 06/25/2021 8:1+1	1 Dally	360 Classroom	Counseling and	04/08/2021 06/25/2021	Individual	1 Monthly	60
Revaluation Declassified 02		Declassified	02/04/2020 02						· ·	Group	2 Weekly	30
Review Therapy Group (5:1) Reevaluation Declassified 03/25/2021 01 Review Annual Review Declassified 01/29/2021 08 Resource 09/02/2020 06/25/2021 5:1 S Weekly 42 Resource Support Services Room Program		Declassified	02						09/08/2020 06/22/2021	Small Group	1 Weekly	30
Review Annual Review Declassified 01/29/2021 08 Resource 09/02/2020 06/25/2021 5:1 S Weekly 42 Resource Support Services Room Room Program	Review								09/14/2020 0 6 /18/2021 :	Small Group	2 Weekly	30
Support Services Room Room Program		Declassified	03/25/2021 01									
	Annual Review	Declassified Support Service	01/29/2021 08 25	Room	•	5 Weekly						
	Annual Review	Declassified	80			5 Weekly	42 Math Class					

Support Services

Coteaching Services

Initial Eligibility Determination Meeting

Ineligible

03/18/2021 08

CR Doc Committee Responsible Sub Total: 101

Total Records: 101
Total Students: 36

CMA BOE Date	CR Doc Committee Responsible	CMA Reason	Decision/Statu	e CHA Dato	CR Expected Grade	CR Next Recommended School [>2010-11 SY)	Program I	Program Start	Program End	Program Ratio	Program Program Frequency Period	n Pregram Program Duration Location	Related Service	RS Start	RS End	RS Ratio RS RS Froquency Period Quantien
04/20/2021	I CZE	Reevaluation/Annua Review	il Classified	01/28/2021	09	211	Co- teaching	d 09/01/202	1 06/24/2022	!	5 Weekly	42 Math Class				
		Recvaluation/Annua Review	l Classified		09		Services Integrated Co- teaching Sorvices	d 09/01/202	1 06/24/2022	!	5 Weekly	42 English / Language Arts Class				
		Regyaluation/Annua Review	l Classified		09			d 09/01/202	1 06/24/2022		5 Weckly	42 Science Class				
		Reevaluation/Annua Review	1 Classified		09			1 09/01/202	1 06/24/2022		5 Weekly	42 Social Studies Class				
		Reevaluation/Annual Review	Classified		09			09/01/202	1 06/24/2022	5:1	5 Weekly	42 Resource Room				
		Annual Review	Classified		07		Resource Room	09/01/202	1 06/24/2022	5:1	5 Weekly	42 Resource Room				
		Annual Review	Classified		07		Program Integrated Co- teaching Services	1 09/01/202	1 06/24/2022		5 Weckly	42 English / Language Arts Class				
		Annual Revlew	Classified	01/29/2021	09			09/01/202	1 06/24/2022		5 Weekly	42 English / Language Arts Class				
		Annual Review	Classified		09			09/01/2021	L 06/24 / 2022		5 Weekly	42 Science Class				
		Annual Review	Classified		09			09/01/2021	06/24/2022		5 Weekly	42 Sodel Studios Class				
		Annual Review	Classified	1	09			09/01/2021	. 06/24/2022	15:1	S Weekly	42 Math Closs				
		Annual Review	Classified	ı	09			09/01/2021	06/24/2022		5 Every 2 weeks	42 Science Class				
		Annual Review	Classified	1	09	į		09/01/2021	06/24/2022	15:1	5 Weekly	42 Math Class				
	•	Annual Review	Classified	1	09			09/01/2021	06/24/2022	15:1	5 Weekly	42 Science Class			•	
	•	Annual Review	Classified	(09	!		09/01/2021	06/24/2022	15:1	5 Weckly	42 Social Studies Class				
	4	Annual Review	Classified	(09	į		09/01/2021	06/24/2022	15:1	5 Weekly	42 English / Language Arts Class				
	•	Annual Review	Classified	(09	9		09/01/2021	06/24/2022	15:1:2	5 Every 2 weeks	42 Science Class				
	•	Annual Review	Classified	(9	9		09/01/2021	06/24/2022	15:1	5 Weekly	42 English / Language				
	•	Annual Review	Classified	C	19			09/01/2021	06/24/2022	15:1	5 Weekly	42 Math Class				
	,	unnual Review	Classified	C	9	5	ipedal Joss -	09/01/2021	06/24/2022	15:1	5 Weekly	42 Science Class				
	,	nnual Review (Classified	C	9	9 6 5	Jass - iodel	09/01/2021	06/24/2022	15:1	5 Weekly	42 Social Studies Class				
	,	nnual Review (□assified	0	19		Studies Special (09/01/2021	06/24/2022	5:1:2	5 Every 2	42 Science				

			Class - Science		wecks	Class				
Annual Review	Classified	09	Special Class - Math	09/01/2021 06/24/2022 15:1	5 Weekly	42 Math Class	Speech/Language 09/09/2021 06/16/20 Therapy	22 Smail Group (5:1)	2 Weekly	30
Annual Review	Classified	09	Special Class - Math	09/01/2021 06/24/2022 15:1	5 Weekly	42 Math Class	Counseling-Sodal 09/09/2021 06/16/20 Skills Counseling		1 Weekly	30
Annual Review	Classified	09	Special Class - Math	09/01/2021 06/24/2022 15:1	5 Weekly	42 Math Class	Parent 09/09/2021 06/16/20 Counseling and Training	22 Small Group (5:1)	4 Yearty	60
Annual Review	Classified	09	Special Class - English	09/01/2021 06/24/2022 15:1	5 Weekly	42 English / Language Arts Class	Therapy	22 Small Group (5:1)	2 Weekly	30
Annual Review	Classified	09 .	Special Class - English	09/01/2021 06/24/2022 15:1	5 Weekly			Group (5:1)	1 Weekly	30
Annual Review	Classified	09	Spedal Class - English	09/01/2021 06/24/2022 15:1	5 Weakly	42 English / Language Arts Class	: Counseling and : Training	Group (5:1)	4 Yearly	60
Annuel Review	Classified	09	Special Class - Social Studies	09/01/2021 06/24/2022 15:1	5 Weekly	42 Social Studies Class	Speech/Language 09/09/2021 06/16/20 Therapy	22 Small Group (5:1)	2 Weekly	30
Annual Review	Classified	09	Special Class - Social	09/01/2021 06/24/2022 15:1	5 Weekly	42 Social Studies Class	Counseling-Social 09/09/2021 06/16/20 Skills Counseling	22 Small Group (5:1)	1 Weekly	30
Annual Review	Classified	09	Studies Special Class - Social Studies	09/01/2021 06/24/2022 15:1	5 Weekly	42 Social Studies Class	Parent 09/09/2021 06/16/20 Counseling and Training	22 Small Group (5:1)	4 Yearty	60
Annual Review	Gessifled	09		09/01/2021 06/24/2022 15:1	5 Weekly	42 Science Class	Speech/Language 09/09/2021 06/16/20 Therapy	22 Smail Group (5:1)	2 Weekly	30
Annual Review	Classified	09		09/01/2021 06/24/2022 15:1	5 Weekly	42 Science Class	Counseling-Social 09/09/2021 06/16/20 Skits Counseling	22 Small Group (5:1)	1 Weekly	30
Annual Review	Classified	09	Special Class - Science	09/01/2021 06/24/2022 15:1	5 Weekly	42 Science Class	Parent 09/09/2021 06/16/20 Counseling and Training	Gгоир (5:1)	4 Yearly	60
Annual Review	Classified	09	Class - Science	09/01/2021 06/24/2022 15:1:2	S Every 2 weeks	42 Science Class	Speech/Language 09/09/2021 06/16/20 Therapy	Group (S:1)	2 Weekly	30
Annual Review	Classified	09	Class - Science	09/01/2021 06/24/2022 15:1:2	5 Every 2 weeks	42 Science Class	Counseling-Social 09/09/2021 06/16/20 Skills Counseling	Group (5:1)	1 Weekly	30
Annual Review	Classified	09	Class - Science	09/01/2021 06/24/2022 15:1:2	5 Every 2 weeks	42 Science Class	Parent 09/09/2021 06/16/20 Counseling and Training	Group (5:1)	4 Yestiy	60 30
Annual Review	Classified	09	Class - Math	09/01/2021 06/24/2022 15:1	5 Weekly	42 Math Class	Speech/Language 09/09/2021 06/16/20 Therapy	Group (5:1)	1 Weekly 2 Weekly	30
Annual Review	Classified	09	Class - Math	09/01/2021 06/24/2022 15:1	5 Weekly	42 Math Class	Speech/Language 09/09/2021 06/16/20 Therapy Speech/Language 09/09/2021 06/16/20		2 Weekly	30
Annual Review Annual Review	Classified	09	Class - English	09/01/2021 06/24/2022 15:1 09/01/2021 06/24/2022 15:1	5 Weekly	Language Arts Class	: Therapy	Group (5:1)	2 Weekly	30
Annual Review	Classified	09	Class - English	09/01/2021 06/24/2022	5 Weekly	Language Arts Class 42 Sodal	Therapy		1 Weekly	30
,	Gassille		Co- teaching Services		J,	Studies Class	Therapy	Group (5:1)	- ' '	
Annual Review	Classified	09	Integrated Co- teaching Services	09/01/2021 06/24/2022	5 Weekly	42 Social Studies Class	Speech/Language 09/09/2021 05/16/20 Therapy	22 Individual	2 Weekty	30
Annual Review	Classified	09	Integrated Co- teaching Services	09/01/2021 06/24/2022	5 Weekly	42 Science Class	Speech/Language 09/09/2021 06/16/20 Therapy	22 Smell Group (5:1)	1 Weekly	30
Annual Review	Ciassified	09		09/01/2021 06/24/2022	5 Weekly	42 Science Class	Speech/Language 09/09/2021 06/16/20 Therapy	22 Individual	2 Weekly	30
Annual Roview	Classified	09		09/01/2021 06/24/2022	S Every 2 weeks	42 Science Class	Speech/Language 09/09/2021 06/16/20 Therapy	22 Small Group (5:1)	1 Weekly	30

Annual Review	Classified	09	Integrated 09/01/2021 06/24/2022 Co- teaching	5 Every 2 weeks	42 Science Class	Speech/Language 09/09/2021 06/16/2022 Individual Therapy	2 Weekly	30
Annual Review	Classified	02/03/2021 10	Services Integrated 09/01/2021 06/24/2022 Co- teaching Services	5 Weekly	42 English / Language Arts Class			
Annual Review	Classified	10	Integrated 09/01/2021 06/24/2022 Co- teaching Services	S Weekly	42 Math Class			
Annual Review	Classified	02/04/2021 11	Integrated 09/01/2021 06/24/2022 Co- teaching Services	5 Weekly	42 English / Language Arts Class			
Annual Review	Classified	11	Integrated 09/01/2021 06/24/2022 Co- teaching Services	5 Weekly	42 Social Studies Class			
Annual Review	Osssified	11	Special 09/01/2021 06/24/2022 15:1 Class - Social Studies	5 Waakiy	42 Social Studies Class			
Annual Review	Classified	11	Special 09/01/2021 06/24/2022 15:1 Class • English	5 Weekly	42 English / Language Arts Class			
Annual Review	Classified	11	Resource 09/01/2021 06/24/2022 S:1 Room Program	5 Weekly	42 Resource Room			
Annual Review	Classified	11	Integrated 09/01/2021 06/24/2022 Co- teaching Services	5 Weekly	42 English / Language Arts Class			
Annual Review	Classified	11	Integrated 09/01/2021 06/24/2022 Co- teaching Services	5 Weekly	42 Social Studies Class			
Annual Review	Classified	11	Resource 09/01/2021 06/24/2022 5:1 Room Program	5 Weekly	42 Resource Room	·		
Annual Review	Classified	11	Integrated 09/01/2021 06/24/2022 Co- teaching Services	5 Weekly	42 English / Language Arts Class			
Annual Review	Classified	11	Integrated 09/01/2021 06/24/2022 Co- teaching Services	5 Weckly	42 Social Studies Class			
Annual Review	Classified	02/05/2021 09	Special 09/01/2021 06/24/2022 15:1 Class - Science	5 Weekly	42 Science Class	Speech/Language 09/09/2021 06/16/2022 Small Therapy Group (5:1)	2 Weekly	30
Annual Review	Classified	09	Special 09/01/2021 06/24/2022 15:1 Class - Science	5 Weekly	42 Science Class	Physical Therapy 09/09/2021 06/16/2022 Individual	1 Weekiy	30
Annual Review	Classified	09	Special 09/01/2021 06/24/2022 15:1 Class - Science	5 Weekly	42 Science Class	Counseling 09/09/2021 06/16/2022 Individual	1 Weekly	30
Annual Review	Classified	09	Special 09/01/2021 06/24/2022 15:1 Class - Social Studies	5 Weekly	42 Sociai Studies Class	Speech/Language 09/09/2021 06/16/2022 Small Therapy (5:1)	2 Weekly	30
Annual Review	Classified	09	Special 09/01/2021 06/24/2022 15:1 Class - Social Studies	5 Weekly	42 Sodal Studies Class	Physical Therapy 09/09/2021 06/16/2022 Individual	1 Weekly	30
Annual Review	Classified	09	Special 09/01/2021 06/24/2022 15:1 Class - Social	5 Weekly	42 Social Studies Class	Counseling 09/09/2021 06/16/2022 Individual	1 Weekly	30
Annual Review	Classified	09	Sques Special 09/01/2021 06/24/2022 15:1 Class - English	S Weekly	42 English / Language Arts Class	Speech/Language 09/09/2021 06/16/2022 Small Therapy Group (5:1)	2 Weekly	30
Annual Review	Classified	09	Special 09/01/2021 06/24/2022 15:1 Class - English	5 Weekly		Physical Therapy 09/09/2021 06/16/2022 Individual	1 Weekly	30
Annual Review	Classified	09	Special 09/01/2021 06/24/2022 15:1 Class - English	S Weakly	42 English / Language Arts Class	Counseling 09/09/2021 06/16/2022 Individual : ;	1 Weekly	30
Annual Review	Classified	09	Integrated 09/01/2021 06/24/2022 Co- teaching Services	5 Weekly	42 Math Class	Specicl/Language 09/09/2021 06/16/2022 Small Therapy Group (5:1)	2 Weekly	30
								

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Reevaluation/Annual Classified Review	05	Integrated 09/01/2021 06/24/2022 Co- teaching	5 Weekly	40 Classroom
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Annual Review Classified	10 -	Special 09/01/2021 06/24/2022 15:1 Class - Math	5 Weekly	42 Math Counseling 09/09/2021 06/16/2022 Individual 1 Weekly 30 Class
Annual Review Classified	10	Special 09/01/2021 06/24/2022 15:1 Class - Science	5 Weekly	42 Science Counseling 09/09/2021 06/16/2022 Individual 1 Weekly 30 Class
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Annual Review	Classified	02	Integrated 09/01/2021 06/24/2022 Co- teaching Services	6 Dally	40 All Counseling-Social 09/09/2021 06/16/2022 Small 1 Weekly 30 Academic Skills Counseling Group Classes (5:1)
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Annual Review	Classified	02	Integrated 09/01/2021 06/24/2022 Co- toaching Services	6 Dally	40 Classroom Occupational 09/09/2021 06/16/2022 Small 1 Weekly 30 Group (5:1)
Annual Review	Classified	02	Integrated 09/01/2021 06/24/2022 Co- toaching Services	6 Daily	40 Classroom Physical Therapy 09/09/2021 06/16/2022 Individual 1 Weakly 30
Annual Review	Classified	02	Integrated 09/01/2021 06/24/2022 Co- teaching Services	6 Dally	40 Classroom Counseling-Sadal 09/09/2021 06/16/2022 Small 2 Monthly 30 Skills Counseling Group (5:1)
Reevaluation/Ann Review	ual Classified	06	Special 09/01/2021 06/24/2022 15:1 Class - Reading	5 Weekly	42 English / Language Arts Class
Recvaluation/Ann Review	ual Classified	06	Special 09/01/2021 06/24/2022 15:1 Class - English	5 Weekly	42 English / Language Arts Class
Reavaluation/Ann Review	ual Classified	06	Special 09/01/2021 06/24/2022 15:1 Class - Math	5 Weekly	42 Math Class
Recyaluation/Anni Review		06	Special 09/01/2021 06/24/2022 15:1 Class - Science	5 Weekly	42 Schence Class
Regualization/Anni Review	ual Classified	06	Special 09/01/2021 06/24/2022 15:1 Class - Social Studies	S Weekly	42 Social Studies Class
Annual Review	Classified	02	Special 09/01/2021 06/24/2022 15:1 Class	6 Dally	40 Classroom Physical Therapy 09/09/2021 06/16/2022 Individual 2 Weekly 30
Annual Review	Classified	02	Special 09/01/2021 06/24/2022 15:1 Class	6 Daily	40 Classroom Occupational 09/09/2021 06/16/2022 Small 2 Weekly 30 Therapy Group (5:1)
Annual Review	Classified	02	Special 09/01/2021 06/24/2022 15:1 Class	6 Dally	40 Classroom Speech/Language 09/09/2021 06/16/2022 Individual 1 Weekly 30 Therapy
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Annual Review	Classified	06	Integrated 09/01/2021 06/24/2022 Co- teaching Services	5 Weekly	42 Social Occupational 09/09/2021 06/16/2022 Small 1 Weekly 30 Studies Therapy Group (5:1)
Annual Review	Classified	06	Integrated 09/01/2021 06/24/2022 Co- teaching Services	5 Waekly	42 English / Occupational 09/09/2021 06/16/2022 Small 1 Weekly 30 Language Therapy Group Arts Class (5:1)
Annual Review	Classified	06	Integrated 09/01/2021 06/24/2022 Co- toaching Services	5 Weekly	42 Science Occupational 09/09/2021 06/16/2022 Small 1 Weekly 30 Class Therapy Group (5:1)
Annual Review	Classified	06	Integrated 09/01/2021 06/24/2022 Co- teaching Services	S Weekly	42 Math Occupational 09/09/2021 06/16/2022 Small 1 Weekly 30 Class Thorapy Group (5:1)
Annual Review	Classified	02	Special 09/01/2021 06/24/2022 15:1 Class	6 Weekly	40 Classroom Occupational 09/09/2021 06/16/2022 Smail 1 Weekly 30 Therapy Group (5:1)
Annual Review	Classified	02	Special 09/01/2021 06/24/2022 15:1 Class	6 Weekly	40 Classroom Speech/Language 09/09/2021 06/16/2022 Small 3 Weekly 30 Group (5:1)
Annual Review	Classified	03/08/2021 02	Special 09/01/2021 06/24/2022 15:1 Class	6 Dally	40 Classroom Speech/Language 09/09/2021 06/16/2022 Small 2 Wookly 30 Group (5:1)
Annual Review	Classified	02	Special 09/01/2021 06/24/2022 15:1 Class	6 Dally	40 Classroom Counseling-Social 09/09/2021 06/16/2022 Small 1 Weekly 30 Skills Counseling Group (5:1)
Annual Review	Classified	02	Special 09/01/2021 06/24/2022 15:1 Class	6 Dally	40 Classroom Parent 09/09/2021 06/16/2022 Small 4 Yearly 60 Counseling and Group
Annual Review	Classified	03	Integrated 09/01/2021 05/24/2022	6 Dally	Training 40 Classroom Speech/Language 09/09/2021 06/16/2022 Small 3 Weekly 30

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	Annual Review Classified	03	Resource 09/01/2021 06/24/2022 5:1 Room Program	5 Weekly	40 Resource Speech/Language 09/09/2021 06/16/2022 Small Group Therapy (5:1)	2 Weekly	30
	Reevaluation/Annual Classifled Review	02	Special 09/01/2021 06/24/2022 15:1 Class	6 Dally	40 Classroom Occupational 09/09/2021 06/16/2022 Small Group	1 Weekly	30
					(5:1)		
	Reevaluation/Annual Classified Review	02	Special 09/01/2021 06/24/2022 15:1 Class	6 Dally	40 Classroom Counseling 09/09/2021 06/16/2022 Individual	1 Weekly	30
	Reevaluation/Annual Classified Review	02	Special 09/01/2021 06/24/2022 15:1 Class	6 Dally	40 Classroom Parent 09/09/2021 06/16/2022 Small Counseling and Group Training	4 Yearly	60
	Reevaluation/Annual Classified Review	02	Special 09/01/2021 06/24/2022 15:1 Class	6 Daily	40 Classroom Speech/Language 09/09/2021 06/16/2022 Individual Therapy	1 Weekly	30
	Reevaluation/Annual Classified Review	02	Special 09/01/2021 06/24/2022 15:1 Class	6 Datly	40 Classroom Speech/Language 09/09/2021 06/16/2022 Small Therapy Group	2 Weekly	30
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	Reevaluation/Annual Classified Review	02	Special 09/01/2021 06/24/2022 15:1 Class	6 Datly	40 Classroom Occupational 09/09/2021 06/16/2022 Small Group (5:1)	2 Weekly	30
	Annual Review Classified	03/24/2021 05	Special 09/01/2021 06/24/2022 15:1 Class	6 Datly	40 Classroom Speech/Language 09/09/2021 06/16/2022 Small Therapy (5:1)	2 Weekly	30
	Annual Review Declassified Support Service	01/29/2021 09 ces			• 0000 pt		
CR Do	c Committee Responsible Sub Total: 365						
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Total Records: 365 Total Students: 104

Interoffice Memorandum

TO:

Dr. Scott T. O'Brien, Superintendent

FROM:

Kristen White, Executive Director of Pupil Personnel Services

DATE:

4/20/2021

RE:

Board Action Sheets

Below please find the schedule to be approved at the 4/20/2021 Board of Education meeting:

SCHEDULE- B 4/20/2021						
Date	Location					
2/24/2021	CPSE Amendment					
3/1/2021	CPSE Amendment					
3/3/2021	CPSE Committee					
3/12/2021	CPSE Committee					
3/19/2021	CPSE Committee					
3/24/2021	CPSE Committee					

CMA ROE Dato	CR Doc Committee Responsible		Decision/State	is CMA Date		CR Mext Recommender School [>2010-11 SY)		Pregram Start	Program End	Program Ratio	Program Program Frequency Period	n Program Program Duration Location	Related Service	RS Stort	RS End	RS Ratio	RS RS Frequency Pariod	RS Duration
04/20/202	L CPSE	Amendment	Classified Preschool	02/24/202	1 Preschoo								Speech/Language Therapy	02/24/202	1 06/25/20	21 Individua	l 3 Weekly	30
		Amendment	Classified Preschool	03/01/202	1 Preschoo	1	Special Education Itinerant Services	03/08/202	1 06/25/202	1 1:1	5 Weekly	240 Classroom		02/01/202	21 06/25/202	11 Individua	i 2 Weekiy	30
		Amendment	Classified Preschool	03/12/202	1 Preschoo	I	Special Class	09/08/2020	06/25/202	1 12;1+1	S Weekly	300 Classroom	Speech/Language Therapy	09/08/202	10 06/25/202	21 Individua	l 3 Weekly	30
		Amendment	Classified Preschool		Preschoo	l	Special Class	09/08/2020	06/25/202	1 12:1+1	S Weckly	300 Classroom	Occupational Therapy	09/08/202	10 06/25/207	11 Individua	l 1 Weekly	30
		Amendment	Classified Preschool		Preschool	l	Special Class	09/08/2020	06/25/202	1 12:1+1	S Weekly	300 Classroom	Physical Therapy	09/08/202	20 06/25/202	11 Individua	! 2 Weekly	30
		Amendment	Classified Preschool		Preschool	I	Special Class	09/08/2020	06/25/202	1 12:1+1	S Weekly	300 Classroom	Psychological Counseling Services	11/09/202	20 06/25/202	21 Individua	l 1 Weekly	30
		Amendment	Classified Preschool		Preschoo!	I	Special Class	09/08/2020	06/25/202	1 12:1+1	5 Weekly	300 Classroom	Parent Counseling and Training	11/09/202	20 06/25/202	21 Individua	! 1 Monthly	y 60
		Amendment	Classified Preschool		Preschool	İ	Special Class	09/08/2020	06/25/202	l 12:1+1	5 Weckly	300 Classroom	Psychological Counseling Services	04/05/202	21 06/25/202	21 Individua	l 1 Weekly	30
		Program Review	Classified Preschool	03/19/202	1 Preschool	l	Special Class	09/10/2020	06/25/202	l 12:1+1	5 Waekly	300 Classroom	Speech/Language Therapy	09/10/202	20 06/25/202	21 Individua	1 3 Weekly	30
		Program Review	Classified Preschool		Preschool	I	Special Class	09/10/2020	06/25/202	1 12:1+1	5 Weekly	300 Classroom		03/22/202	21 06/25/202	21 Individua	1 2 Weekly	30
		Program Review	Classified Preschool		Preschool		Special Class	09/10/2020	06/25/202	1 12:1+1	5 Weekly	300 Classroom		12/22/202	20 06/25/202	21 Individua	1 Monthi _l	, 6a
		Initial Eligibility Determination Meeting	Classified Preschool	03/24/202	1 Preschool	I							Speech/Language Therapy	04/12/202	11 06/25/202	21 Individua	l 2 Weekly	30
		Reevaluation Review	Classified Preschool		Preschool	Į.	Special Class in an Integrated Setting		06/25/202	1 18:2;1	5 Weekl y	300 Classmon	Occupational Therapy	04/06/202	21 06/25/202	21 Individus	l 2 Weekly	30
		Reevaluation Review	Classified Preschool		Preschool		Special Class in an Integrated Setting		06/25/2021	1 18:2:1	S Weekly	300 Classroom	Physical Therapy	04/06/202	21 06/25/20	21 Individua	l 2 Weekly	30
		Reevaluation Review	Classified Preschool		Preschool	ı	Special Class in an Integrated		06/25/202:	18:2:1	S Weekly	300 Classroom	Speech/Language Therapy	: 09/09/202	20 06/25/20	21 Individus	i 3 Weekly	30
		Initial Eligibility Determination Meeting	Classified Preschool/No Services Continued EI	03/03/202	1 Preschool		Setting Special Class	03/03/2021	06/25/202	1 8:1+1	S Weckly	300 Classroom	Speech/Language Therapy	: 03/03/202	21 06/25/20:	21 Individua	d 3 Weekly	30
		Initial Bigibility Determination Meeting	Classified Preschool/No		Preschaol	ı	Special Class	03/03/2021	06/25/202	l 8:1+1	S Wcekly	nooraasiD 00E	Occupational Therapy	03/03/202	21 06/25/20	21 Individue	d 2 Weekly	, 30
		Initial Eigibility Determination Meeting	Classified Preschool/No Services Continued E1		Preschool		Special Class	03/03/2021	06/25/202	8:1+1	5 Weckly	300 Classroom	Physical Therapy	03/03/20	21 06/25/20	21 Individua	d 2 Weekl	, 30
		Annual Review	Declassified	03/12/202	1 Preschool													
	CR Doc Com	mittoe Respo	nsible Sub Total	: 19				_										

Total Records: 19 Total Students: 8

CMA BOE Date	CR Doc Committee Responsible		Decision/Status CH	A Date CR Expe Grad	CR Next ted Recommends School [>2019-11 SY)	Program d	Stort	Program End	Program Ratio	Progrem Progrem Frequency Period	n Program Program Duration Location	Related Service	RS Start	RS End	RS Ratio	ES ES Frequency Period	RS Duration
04/20/202	1 CPSE	Initial Bigiblity Determination Meeting	Preschool	03/2021 Presc		Special Class	09/13/202	1 06/24/202	2 6:1+1	5 Weckly	- 300 Classroom	n Speech/Language Therapy	09/13/202	1 06/24/20	22 Individua	3 Weekly	30
		Initial Eligibility Determination Meeting	Classified Preschool	Presc	haol	Special Class	09/13/202	1 06/24/202	2 8:1+1	5 Weekly	300 Classroon	n Occupational Therapy	09/13/202	1 06/24/20	22 Individua	1 2 Weekly	30
		Initial Eligibility Determination Meeting	Classified Preschool	Presc	hool	Special Class	09/13/202	1 06/24/202	2 6:1+1	5 Waekly	300 Classroon	n Physical Therapy	09/13/202	1 06/24/20	22 Individua	l 2 Weekly	30
		Annual Review	Classified 03/ Preschool	12/2021 Preso	hool	Special Class	09/01/202	1 06/24/202	2 6:1+1	S Weekly	330 Classroon	n Physical Therapy	09/01/202	1 06/24/20	22 Individua	1 2 Weekly	30
		Annual Review	Classified Preschool	Presc	haol	Special Class	09/01/202	1 06/24/202	2 6:1+1	5 Weekly	330 Classroon	n Parent Counseling and Training	09/01/202	1 06/24/20	22 Individua	I 1 Monthly	60
		Annual Review	Classified Preschool	Presc	hool	Special Class	09/01/202	1 06/24/202	2 6:1+1	S Weekly	330 Classroon	n Speech/Language Therapy	09/01/202	11 06/24/20	22 Individua	1 3 Weekly	30
		Annuel Review	Classified Preschool	Presc	hool	Special Class	09/01/202	06/24/202	2 6:1+1	S Weekly	330 Classroon	n Occupational Therapy	09/01/202	1 06/24/20	22 Individua	1 2 Weekly	30
		Annual Review	Classified Preschool	Presc	hool	Special Class	09/01/202	06/24/202	2 12:1+1	5 Weekly	300 Classroom	n Psychological Counseling Services	09/01/202	1 06/24/20	22 Individua	1 1 Weekly	30
		Annual Review	Qassified Preschool	Presc	hool	Special Class	09/01/202	t 06/24/202	2 12:1+1	5 Weekly	300 Classroon	n Speech/Language Therapy	09/01/202	1 06/24/20	22 Sm29 Group (5:1)	1 Weekly	30
		Annual Review	Classified Preschool	Preso	hool	Special Class	09/01/202	1 C6/24/202	2 12:1+1	5 Weekly	300 Classroon	n Speech/Language Therapy	09/01/20	21 06/24/20		i 2 Weekly	
	^	Annual Review	Classified Preschool	Preso	haci	Special Class	09/01/202	1 06/24/202	2 12:1+1	5 Weekly	300 Classroom	n Occupational Therapy	09/01/202	21 06/24/20	22 Individua	u 2 Weekly	
		Annual Review	Classified Preschool	Preso	hool	Special Class	09/01/202	1 06/24/202	2 12:1+1	5 Weekly	300 Classroor	n Physical Therapy	09/01/20	21 06/24/20	22 Individua		
		Annual Review	Classified Preschool	Presc	hool	Special Class	09/01/202	1 06/24/202	2 12;1+1	5 Weekly	300 Classroor	n Psychological Counseling Services	09/01/20	21 06/24/20	22 Individua		
		Annual Review	Classified Preschool	Presc	hool	Special Class	09/01/202	1 06/24/202	2 12:1+1	S Weekly	300 Classroor	Counseling and Training		21 06/24/20			
		Annual Review	Classified Preschool	Presc	hool	Special Class	09/01/202	06/24/202	2 12:1+1	5 Weekly	240 Classroor	n Speech/Language Therapy	09/01/20	21 06/24/20	22 Individua		
		Annual Review	Classified Preschool	Preso	hool	Special Class	09/01/202	1 06/24/202	2 12:1+1	5 Weekly	240 Classroor	n Occupational Therapy	09/01/202	21 06/24/20	22 Individua		
		Annuel Review	Classified Preschool	Presc	hool	Special Class	09/01/202	1 06/24/202	2 12:1+1	S Weekly	240 Classroor	n Speech/Language Therapy	2 09/01/20	21 06/24/20	22 Smail Group (5:1)	1 Weekly	
		Annual Review	Classified Preschool	Preso	hool	Special Class	09/01/202	C6/24/202	2 12:1+1	5 Daily	150 Classroor	n Speech/Language Therapy	09/01/20	21 06/24/20	22 (ndividu:		
		Annual Review	Classified Preschool	Presc	hool	Special Class	09/01/202	06/24/202	2 12:1+1	5 Dally	150 Classroor	n Occupational Therapy	09/01/20	21 06/24/20	22 Individu		
		Annual Review	Classified Preschool	Preso	hool	Special Class	09/01/202	1 06/24/202	2 6:1+1	5 Weekly	330 Classroor	n Parent Counseling and Training	09/01/20	21 06/24/20	122 Individus	al 1 Monthly	•
		Annual Review	Classified Preschool	Presc	hool	Special Class	09/01/202	1 06/24/202	2 6:1+1	5 Weekly	330 Classroon	n Speech/Language Therapy	09/01/20	21 06/24/20)22 Individu:		
		Annual Review	Classified Preschool	Preso	haal	Special Class	09/01/202	1 06/24/202	2 6:1+1	S Weekly		n Occupational Therapy		21 06/24/20			
		Annual Review	Classified Preschool	Presc	hool	Special Class	09/01/202	1 06/24/202	2 6:1+1	5 Weekly	330 Classroor	n Physical Therapy	09/01/20	21 06/24/20	22 Individu	el 2 Weekly	, 30
	CR Doc Con	mittee Respo	nsible Sub Total: 23										_				

Total Records: 23 Total Students: 6

Advisory Intra-agency Communication for the Benefit of the Superintendent of Schools Draft Proposed Resolution for Inclusion on the September 24, 2018 Board of Education Agenda

New Entrant with IEP (Year-to-date)	
Number of Students Classified CSE (Year-to-date)(IR + NE)	
Number of Declassified CSE Students (Year-to-date)	
Number of Exited CSE Students (Year-to-date)	Total CSE (District wide)
Number of Initial Referrals CPSE (Year-to-date)	
Initial Referrals Classified CPSE (Year-to-date)	
New Entrant with IEP CPSE (Year-to-date)	
Number of Students Classified CPSE (Year-to-date) (IR + NE)	
	Number of Students Classified CSE (Year-to-date) (IR + NE) Number of Declassified CSE Students (Year-to-date) Number of Exited CSE Students (Year-to-date) Number of Initial Referrals CPSE (Year-to-date) Initial Referrals Classified CPSE (Year-to-date) New Entrant with IEP CPSE (Year-to-date)

Advisory Intra-agency Communication for the Benefit of the Superintendent of Schools Draft Proposed Resolution for Inclusion on the September 24, 2018 Board of Education Agenda

Number of Declassified CPSE Students (this month)	Number of Declassified CPSE Students (Year-to-dat	e)
Number of Exited CPSE Students (this month)	Number of Exited CPSE Students (Year-to-date)	Total CPSE (District wide)
Number of Initial Referrals 504 (this month)	Number of Initial Referrals 504 (Year-to-date)	
Exited/Declassified/Ineligible 504 (this month)	Exited/Declassified/Ineligible 504 (Year-to-date)	Total 504 (District wide)
Number of Students Recommended to Out-of-District Places	ment (this month)	
Number of Students Recommended to Out-of-District Placer	ment (Year-to-date)	
Number of Students Recommended Returning to In-District	Placement (this month)	
Number of Students Recommended to Return to In-District	Placement (Year-to-date)	

AMENDMENTS TO PROGRAM SERVICES WHICH DIRECTLY IMPACT STAFFING AND/OR BUDGET

Eastport-South Manor Central School District

149 Dayton Avenue • Manorville, New York 11949 • (631) 801-3000 • Fax (631) 874-6750 • www.esmonline.org

JOSEPH A. STEIMEL
Superintendent of Schools



ADAM FRANKEL

Assistant Superintendent for Curriculum & Instruction

TIM LAUBE

Assistant Superintendent for Business & Operations

LINDA ANNE WEISS

Assistant Superintendent for Personnel & Student Services

February 11, 2021

Dr. Scott O'Brien Rocky Point UFSD 90 Rocky Point-Yaphank Road Rocky Point, NY 11778

Re: 2020 - 2021 Recognition of Brookhaven Cluster Superintendents

Dear Dr. O'Brien:

In appreciation of your commitment to public education, as well as your participation in supporting the initiatives of the Brookhaven Cluster of Suffolk County Superintendents Association, please accept this donation of \$500 to support students at Rocky Point UFSD.

This donation may be used, at your discretion, to recognize a graduating senior, assist any student with the fees associated with upcoming events, to purchase materials for a District or Building program, or any worthwhile project within the Rocky Point UFSD.

Thank you again for your hard work and the support that benefits all Cluster Members and Districts.

Cordially.

Joseph A./Steimel

Brookhaven Cluster Treasurer

MAR - 8 2021

ROCKY POINT SCHOOL DISTRICT OFFICE OF THE SUPERINTENDENT

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SURPLUS EQUIPMENT DISPOSAL

School: JAE	Department:	Jan Office	Name: Scott Bullis	
Description	Model#/Serial#	Property Tag #	Quantity	Reason for Disposal
Vision Screener	SHS 196	(0)401	1.1	Outdated / No longer Use
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Assistant Superintendent Signature Musann Aossa

ROCKY POINT PUBLIC SCHOOLS

SURPLUS EQUIPMENT DISPOSAL

Title & Author	ISBN#	Copyright Date	Number to be disposed	Rationale	Subject
Go Math! (Intensive Intervention Skill Packs) by Houghton Mifflin Harcourt	978-0-547-94511-8	No date	1	OLD/Outdated Materials	Math
Go Math! (Strategetic Intervention Teacher Activity Guide) by Houghton Mifflin Harcourt	978-0-547-93952-0	No date	2	OLD/Outdated Materials	Math
Go Math! (Assessment Guide) by Houghton Mifflin Harcourt	978-0-547-58686-1	2010	1	OLD/Outdated Materials	Math
Go Math! (Intensive Intervention Teacher Guide) by Houghton Mifflin Harcourt	978-0-547-94540-8	No date	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 1 by Houghton Mifflin Harcourt	978-0-547-59135-3	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 2 by Houghton Mifflin Harcourt	978-0-547-59137-7	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 3 by Houghton Mifflin Harcourt	978-0-547-59140-7	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 4 by Houghton Mifflin Harcourt	978-0-547-59142-1	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 5 by Houghton Mifflin Harcourt	978-0-547-59143-8	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 6 by Houghton Mifflin Harcourt	978-0-547-59144-5	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 7 by Houghton Mifflin Harcourt	978-0-547-59175-9	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 8 by Houghton Mifflin Harcourt	978-0-547-59174-2	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 9 by Houghton Mifflin Harcourt	978-0-547-59180-3	2012	1		Math
Go Math! Teacher Edition Chapter 10 by Houghton Mifflin Harcourt	978-0-547-59181-0	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 11 by Houghton Mifflin Harcourt	978-0-547-59178-0	2012	1		Math
Go Math! Teacher Edition Chapter 12 by Houghton Mifflin Harcourt	978-0-547-59179-7	2012	1		Math
Go Math! Teacher Edition Chapter 13 by Houghton Mifflin Harcourt	978-0-547-59182-7	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Planning Guide by Houghton Mifflin Harcourt	978-0-547-59089-9	2012	1		Math
Genre Study by Heinemann	978-0-325-02874-3	2012	2		Mixture
Looking at Ecosystems by Harcourt Science	0-15-315693-7	2000	24		Science
Vocabulary Workshop Level Blue by Sadlier	978-0-8215-8005-9	2011	20		English
Discovery Works (Unit B Sun, Moon and Earth) by Houghton Mifflin Science	0-618-00248-0	No date	9	OLD/Outdated Materials	Science
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Discovery Works (Unit D Earth's Resources) by Houghton Mifflin Science	0-618-00250-2	No date	14		Science
Passport to Latin America & Canada by Scott Foresman	0-328-03898-9		27		History
Go Math! (Strategetic Intervention Teacher Activity Guide) by Houghton Mifflin Harcourt	978-0-547-93966-7	No date	2		Math
Go Math! (Intensive Intervention Teacher Guide) by Houghton Mifflin Harcourt	978-0-547-94557-6	No date	2		Math
Go Math! (Intensive Intervention Skill Packs) by Houghton Mifflin Harcourt	978-0-547-94512-5	No date	1	OLD/Outdated Materials	Math
Go Math! (Standards Practice Book) by Houghton Mifflin Harcourt	978-0-547-58816-2	2010	1		Math
Go Math! (Assessment Guide) by Houghton Mifflin Harcourt	978-0-547-58685-4	2010	2		Math
Go Math! by Houghton Mifflin Harcourt	978-0-547-58781-3	2010	2		Math
Go Math! (Reteach Backline Masters) by Houghton Mifflin Harcourt	978-0-547-58722-6	No date	1		Math
Go Math! Teacher Edition Chapter 1 by Houghton Mifflin Harcourt	978-0-547-59189-6	2012	2		Math
Go Math! Teacher Edition Chapter 2 by Houghton Mifflin Harcourt	978-0-547-59183-4	2012	2		Math
Go Math! Teacher Edition Chapter 3 by Houghton Mifflin Harcourt	978-0-547-59190-2	2012	2	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 4 by Houghton Mifflin Harcourt	978-0-547-59188-9	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 5 by Houghton Mifflin Harcourt	978-0-547-59192-6	2012	2	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 6 by Houghton Mifflin Harcourt	978-0-547-59191-9	2012	3	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 7 by Houghton Mifflin Harcourt	978-0-547-59185-8	2012	3	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 8 by Houghton Mifflin Harcourt	978-0-547-59194-0	2012	2	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 9 by Houghton Mifflin Harcourt	978-0-547-59176-6	2012	2	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 10 by Houghton Mifflin Harcourt	978-0-547-59173-5	2012	2	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 11 by Houghton Mifflin Harcourt	978-0-547-59187-2	2012	2	OLD/Outdated Materials	Math
Go Math! Teacher Edition Planning Guide by Houghton Mifflin Harcourt	978-0-547-59094-3	2012	2	OLD/Outdated Materials	Math
Our Neighbors Canada & Latin America by Harcourt Brace Social Studies	0-15-316093-4	1995	15	OLD/Outdated Materials	History
Strategies for Writers by Crawford & Sipe	978-0-7367-6090-4	No date	11	OLD/Outdated Materials	English
Strategies for Writers Teacher's Edition by Crawford & Sipe	978-0-7367-5116-2	2008	1	OLD/Outdated Materials	English
Leaders- Common Core Readers by National Geographic	978-07362-93853	2013	1	OLD/Outdated Materials	Reading
Leaders- Common Core Readers by National Geographic	978-0-7362-9360-0	2013	2	OLD/Outdated Materials	Reading
Go Math! (Strategetic Intervention Teacher Activity Guide) by Houghton Mifflin Harcourt	978-0-547-93951-3	No date	1	OLD/Outdated Materials	Math
Go Math! (Reteach Backline Masters) by Houghton Mifflin Harcourt	978-0-547-58720-2	No date	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 1 by Houghton Mifflin Harcourt	978-0-547-59101-8	2012	1	OLD/Outdated Materials	Math

Go Math! Teacher Edition Chapter 2 by Houghton Mifflin Harcourt	978-0-547-59103-2	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 3 by Houghton Mifflin Harcourt	978-0-547-59104-9	2012	1		Math
Go Math! Teacher Edition Chapter 4 by Houghton Mifflin Harcourt	978-0-547-59106-3	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 5 by Houghton Mifflin Harcourt	978-0-547-59110-0	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 6 by Houghton Mifflin Harcourt	978-0-547-59111-7	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 7 by Houghton Mifflin Harcourt	978-0-547-59115-5	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 8 by Houghton Mifflin Harcourt	978-0-547-59116-2	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 9 by Houghton Mifflin Harcourt	978-0-547-59118-6	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 10 by Houghton Mifflin Harcourt	978-0-547-59122-3	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 11 by Houghton Mifflin Harcourt	978-0-547-59123-0	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Chapter 12 by Houghton Mifflin Harcourt	978-0-547-59131-5	2012	1	OLD/Outdated Materials	Math
Go Math! Teacher Edition Planning Guided by Houghton Mifflin Harcourt	978-0-547-59093-6	2012	1	OLD/Outdated Materials	Math
Science-Physical Science by Scott Foresman	978-0-328-30444-8	2008	25	OLD/Outdated Materials	Science
A Writer's Notebook by Ralph Fletcher	0-380-78430-0	1996	1	OLD/Outdated Materials	Writing
Craft Lessons by Ralph Fletcher	1-57110-073-3	1998	2	OLD/Outdated Materials	Reading
Awakening the Heart by Naomi Shihab Nye	0-325-00093-x	1999	2	OLD/Outdated Materials	Reading
Graphic Organizations by Scholastic	0-590-48928-3	1995	1	OLD/Outdated Materials	Reading
Nonfiction Craft Lessons by Ralph Fletcher	1-57110-329-5	2001	1	OLD/Outdated Materials	Reading
The Reading Teacher's book of Lists by Fry, Kress & Fountoukids	0-13-028185-9	2000	1	OLD/Outdated Materials	Reading
After the End by Barry Lane	0-435-08714-2	1993	1	OLD/Outdated Materials	Reading
Communities by Scott Foresman	0-328-23973-9	No date	1	OLD/Outdated Materials	Reading
Bud, Not Buddy by Christopher Paul Curtis	0-439-22188-9	1999	1		Reading
Celebrate by Houghton Mifflin	0-395-71955-0	1996	7	OLD/Outdated Materials	Reading
Writing Workshop by Ralph Fletcher	0-325-00362-9	2001	1	OLD/Outdated Materials	Writing
What a Writer Needs by Ralph Fletcher	0-435-08734-7	1993	1		Writing
Write on Track by Kemper, Nathan and Sebranek	0-669-40881-6	1996	1	OLD/Outdated Materials	Writing
Connecting Character to Conduct by Stein, Richin, Banyon, Banyon & Stein	0-87120-388-x	2000	2		Reading
Poetry Matters by Ralph Fletcher	0-380-79703-8	1999			Reading
How Writers Work by Ralph Fletcher	978-0-380-79702-8	2000	1		Writing
Nonfiction Matters by Stephanie Harvey	1-57110-072-5	1998	1		Reading
The Continuum of Literacy Learning by Heinemann	978-0-325-02880-4	2011	1		Reading
Leveled books for Readers by Fountas & Pinnell	0-325-00307-6	2002	1		Reading
Differentitating Textbooks by Forsten, Grant & Hollas	1-884548-48-2	2003	1		Reading
Crunch Time by Heinemann	978-0-325-02673-2	2009	1		Reading
Engaging Grammar by Benjamin & Oliva	978-0-8141-2338-6	2007	1		Reading
Guided Readers & Writers by Fountas & Pinnell	0-325-00310-6	2001	1		Reading
Teaching Resource Kit- Grade 3 on level by Houghton Mifflin	978-0-618-34469-7	No date	1		Reading
Teaching Resource Kit- Grade 3 below level by Houghton Mifflin	978-0-618-34463-5	No date	1		Reading
Teaching Resource Kit- Grade 3 above level by Houghton Milfilin	978-0-618-34476-5	No date	1		Reading
Teaching Resources with Color Transparencies-From Bacteria to Plants by Prentice Hall Science Explorer	0-13-436638-7	2000	<u>'</u> 1		Reading
rbook-Teacher's Edition by Scholastic	978-0-545-31827-3	2012	1		Reading
Read 180- NEXT Generation by Scholastic	978-0-545-34864-5	2012	<u>'</u> 1		Reading
	0-07-603714-2	No date	1		Math
Real Math Grade 3- Volume 1 by SRA	0-07-603714-2	No date	3		Math
Real Math Grade 3- Volume 2 by SRA					
Real Math Grade 5- Volume 1 by SRA	0-07-603718-5	No date	1		Math
Real Math Grade 5- Volume 2 by SRA	0-07-603719-3	No date	2		Math
Real Math (Intervention Support Guide) by SRA	07-604361-4	2007	5		Math
Science Explorer-From Bacteria to Plants by Prentice Hall	0-13-434490-1	2000	153		Science
Science Explorer-Cells & Heredity by Prentice Hall	0-13-434479-0	2000	184		Science
Science Explorer-Human Biology & Health by Prentice Hall	0-13-434487-1	2000	176		Science
Science Explorer-Environmental Science by Prentice Hall	0-13-434486-3	2000	157		Science
Science Explorer-Human Biology & Health Teacher's Edition by Prentice Hall	0-13-434568-1	2000	3	OLD/Outdated Materials	Science

0-13-434567-3	2000	2	OLD/Outdated Materials	Science
0-13-429192-1	2000	4	OLD/Outdated Materials	Science
0-13-434571-1	2000	4	OLD/Outdated Materials	Science
0-13-436637-9	2000	1	OLD/Outdated Materials	Science
0-13-436639-5	2000	1	OLD/Outdated Materials	Science
978-0-618-84819-5	2008	22	OLD/Outdated Materials	Reading
978-0-618-84823-2	2008	26	OLD/Outdated Materials	Reading
978-0-618-85157-7	No date	1	OLD/Outdated Materials	Reading
978-0-618-85158-4	No date	1	OLD/Outdated Materials	Reading
978-0-618-85159-1	No date	1	OLD/Outdated Materials	Reading
978-0-618-85160-7	No date	2	OLD/Outdated Materials	Reading
978-0-618-85161-4	No date	2	OLD/Outdated Materials	Reading
978-0-618-85162-1	No date	1	OLD/Outdated Materials	Reading
0-395-74751-1	1996	1	OLD/Outdated Materials	Reading
	0-13-429192-1 0-13-434571-1 0-13-436637-9 0-13-436639-5 978-0-618-84819-5 978-0-618-84823-2 978-0-618-85157-7 978-0-618-85158-4 978-0-618-85159-1 978-0-618-85160-7 978-0-618-85161-4 978-0-618-85162-1	0-13-429192-1 2000 0-13-434571-1 2000 0-13-436637-9 2000 0-13-436639-5 2000 978-0-618-84819-5 2008 978-0-618-84823-2 2008 978-0-618-85157-7 No date 978-0-618-85158-4 No date 978-0-618-85159-1 No date 978-0-618-85160-7 No date 978-0-618-85161-4 No date	0-13-429192-1 2000 4 0-13-434571-1 2000 4 0-13-436637-9 2000 1 0-13-436639-5 2000 1 978-0-618-84819-5 2008 22 978-0-618-84823-2 2008 26 978-0-618-85157-7 No date 1 978-0-618-85158-4 No date 1 978-0-618-85159-1 No date 1 978-0-618-85160-7 No date 2 978-0-618-85161-4 No date 2 978-0-618-85162-1 No date 1	0-13-429192-1 2000 4 OLD/Outdated Materials 0-13-434571-1 2000 4 OLD/Outdated Materials 0-13-436637-9 2000 1 OLD/Outdated Materials 0-13-436639-5 2000 1 OLD/Outdated Materials 978-0-618-84819-5 2008 22 OLD/Outdated Materials 978-0-618-84823-2 2008 26 OLD/Outdated Materials 978-0-618-85157-7 No date 1 OLD/Outdated Materials 978-0-618-85158-4 No date 1 OLD/Outdated Materials 978-0-618-85159-1 No date 1 OLD/Outdated Materials 978-0-618-85160-7 No date 2 OLD/Outdated Materials 978-0-618-85161-4 No date 2 OLD/Outdated Materials 978-0-618-85162-1 No date 1 OLD/Outdated Materials

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SUBJECT: TITLE IX AND SEX DISCRIMINATION

Overview

The District is committed to creating and maintaining education programs and activities which are free from discrimination and harassment. This policy addresses complaints of sex discrimination, including sexual harassment, made under Title IX of the Education Amendments Act of 1972 and its implementing regulations (Title IX). It is just one component of the District's overall commitment to maintaining a discrimination and harassment-free educational and work environment.

Title IX prohibits discrimination on the basis of sex in any education program or activity operated by a district that receives federal financial assistance. As required by Title IX, the District does not discriminate on the basis of sex in its education programs and activities or when making employment decisions.

The District adopts this policy as part of its effort to provide for the prompt and equitable resolution of complaints of sex discrimination, including sexual harassment. The District will promptly respond to reports of sex discrimination, ensure that all investigations are conducted within a reasonably prompt time frame and under a predictable fair grievance process that provides due process protections to complainants and respondents, and impose sanctions and implement remedies when warranted.

Inquiries about this policy or the application of Title IX may be directed to the District's Title IX Coordinator(s), the Assistant Secretary for Civil Rights of the United States Department of Education, or both.

Scope and Application of Policy

This policy is limited to addressing complaints of sex discrimination, including sexual harassment, that fall within the scope of Title IX which, among other things, has a specific definition of sexual harassment and applies only to sex discrimination occurring against a person in the United States. This policy applies to any individual participating in or attempting to participate in the District's education programs or activities including students and employees.

Other District policies and documents address sex-based misconduct and may have different definitions, standards of review, and grievance procedures. These documents must be read in conjunction with this policy as they may cover incidents of sex-based misconduct not addressed by Title IX.

If the allegations forming the basis of a formal complaint of sexual harassment, if proven, would constitute prohibited conduct under Title IX, then the grievance process outlined in this policy would be applied to the investigation and adjudication of all the allegations. Depending on the allegations, additional grievance procedures may apply.

The dismissal of a formal complaint of sexual harassment under Title IX does not preclude action under another related District policy, procedure, collective bargaining agreement, or other document such as the District's *Code of Conduct*.

SUBJECT: TITLE IX AND SEX DISCRIMINATION (Cont'd.)

What Constitutes Sex Discrimination Including Sexual Harassment

Title IX prohibits various types of sex discrimination including, but not limited to: sexual harassment; the failure to provide equal athletic opportunity; sex-based discrimination in a District's science, technology, engineering, and math (STEM) courses and programs; and discrimination based on pregnancy.

Under Title IX, sexual harassment includes conduct on the basis of sex that satisfies one or more of the following:

- a) An employee of the District conditioning the provision of an aid, benefit, or service of the District on an individual's participation in unwelcome sexual conduct;
- b) Unwelcome conduct determined by a reasonable person to be so severe, pervasive, and objectively offensive that it effectively denies a person equal access to the District's education program or activity;
- c) Sexual assault, meaning an offense classified as a forcible or nonforcible sex offense under the uniform crime reporting system of the Federal Bureau of Investigation;
- d) Dating violence, meaning violence committed by a person:
 - 1. Who is or has been in a social relationship of a romantic or intimate nature with the victim; and
 - 2. Where the existence of such a relationship will be determined based on a consideration of the following factors:
 - (a) The length of the relationship;
 - (b) The type of relationship;
 - (c) The frequency of interaction between the persons involved in the relationship;
- e) Domestic violence, meaning felony or misdemeanor crimes of violence committed by a current or former spouse or intimate partner of the victim, by a person with whom the victim shares a child in common, by a person who is cohabitating with or has cohabitated with the victim as a spouse or intimate partner, by a person similarly situated to a spouse of the victim under the domestic or family violence laws of the jurisdiction receiving grant monies, or by any other person against an adult or youth victim who is protected from that person's acts under the domestic or family violence laws of the jurisdiction; or

SUBJECT: TITLE IX AND SEX DISCRIMINATION (Cont'd.)

- f) Stalking, meaning engaging in a course of conduct directed at a specific person that would cause a reasonable person to:
 - 1. Fear for his or her safety or the safety of others; or
 - 2. Suffer substantial emotional distress.

Title IX Coordinator

The District has designated and authorized the following District employee(s) to serve as its Title IX Coordinator(s):

Susann Crossan, Assistant Superintendent Christopher Van Cott, Assistant Superintendent for Business

The Title IX Coordinator(s), who must be referred to as such, will coordinate the District's efforts to comply with its responsibilities under Title IX. However, the responsibilities of the Title IX Coordinator(s) may be delegated to other personnel.

Where appropriate, the Title IX Coordinator(s) may seek the assistance of the District's Civil Rights Compliance Officer(s) (CRCO(s)) and/or Dignity Act Coordinator(s) (DAC(s)) in investigating, responding to, and remedying complaints of sex discrimination, including sexual harassment.

Reporting Allegations of Sex Discrimination

Any person may report sex discrimination, including sexual harassment, regardless of whether they are the alleged victim or not. Reports may be made in person, by using the contact information for the Title IX Coordinator, or by any other means that results in the Title IX Coordinator receiving the person's oral or written report. This report may be made at any time (including during non-business hours) by using the telephone number or email address, or by mail to the office address, listed for the Title IX Coordinator.

Reports of sex discrimination may also be made to any other District employee including a supervisor, building principal, or the District's CRCO. All reports of sex discrimination, including sexual harassment, will be forwarded to the District's Title IX Coordinator. Reports may also be forwarded to other District employees depending on the allegations.

All District employees who witness or receive an oral or written report of sex discrimination must immediately inform the Title IX Coordinator. Failure to immediately inform the Title IX Coordinator may subject the employee to discipline up to and including termination.

SUBJECT: TITLE IX AND SEX DISCRIMINATION (Cont'd.)

Making a report of sexual harassment is not the same as filing a formal complaint of sexual harassment. A formal complaint is a document either filed by a complainant or a parent or legal guardian who has a right to act on behalf of the complainant or signed by the Title IX Coordinator which alleges sexual harassment against a respondent and requests that the District investigate the allegations. While the District must respond to all reports it receives of sexual harassment, the Title IX grievance process is only initiated with the filing of a formal complaint.

In addition to complying with this policy, District employees must comply with any other applicable District policy, procedure, collective bargaining agreement, or other document such as the District's *Code of Conduct*. This includes, but is not limited to, Policy #7554 -- Dignity for All Students (DASA) which requires District employees to make an oral report promptly to the Superintendent or principal, their designee, or the DAC not later than one school day after witnessing or receiving an oral or written report of harassment, bullying, and/or discrimination of a student. Two days after making the oral report, DASA further requires that the District employee file a written report with the Superintendent or principal, their designee, or the DAC.

If the Title IX Coordinator is unavailable, including due to a conflict of interest or other disqualifying reason, the report will be directed to another Title IX Coordinator, if the District has designated another individual to serve in that capacity. If the District has not designated another Title IX Coordinator, the Superintendent will ensure that another person with the appropriate training and qualifications is appointed to act as the Title IX Coordinator.

Grievance Process for Complaints of Sex Discrimination Other than Sexual Harassment

The District will provide for the prompt and equitable resolution of reports of sex discrimination other than sexual harassment. In responding to these reports, the Title IX Coordinator will utilize, as applicable, the grievance process set forth in Policy #3420 -- Non-Discrimination and Anti-Harassment in the District and any other applicable District policy, procedure, collective bargaining agreement, or other document such as the District's *Code of Conduct*.

Grievance Process for Formal Complaints of Sexual Harassment

The District will respond to allegations of sexual harassment in a manner that is not deliberately indifferent whenever it has actual knowledge of sexual harassment in an education program or activity of the District. The District is deliberately indifferent only if its response to sexual harassment is clearly unreasonable in light of the known circumstances. For purposes of reports and formal complaints of sexual harassment under Title IX, education program or activity includes locations, events, or circumstances over which the District exercised substantial control over both the respondent(s) and the context in which the sexual harassment occurred.

The District will follow a grievance process that complies with law and regulation before the imposition of any disciplinary sanctions or other actions that are not supportive measures against a respondent.

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Community Relations

SUBJECT: TITLE IX AND SEX DISCRIMINATION (Cont'd.)

The District will conduct the grievance process in a timely manner designed to provide all parties with a prompt and equitable resolution. It is anticipated that, in most cases, the grievance process will be conducted within a reasonably prompt manner and follow the time frames established in this policy.

Definitions

- a) "Actual knowledge" means notice of sexual harassment or allegations of sexual harassment to a District's Title IX Coordinator or any official of the District who has authority to institute corrective measures on behalf of the District, or to any District employee. Imputation of knowledge based solely on vicarious liability or constructive notice is insufficient to constitute actual knowledge. This standard is not met when the only official of the District with actual knowledge is the respondent. The mere ability or obligation to report sexual harassment or to inform a student about how to report sexual harassment, or having been trained to do so, does not qualify an individual as one who has authority to institute corrective measures on behalf of the District. "Notice" as used in this paragraph includes, but is not limited to, a report of sexual harassment to the Title IX Coordinator as described in this policy.
- b) "Complainant" means an individual who is alleged to be the victim of conduct that could constitute sexual harassment.
- c) "Days" means in session ("school days") or "calendar days," as specified.
- d) "Formal complaint" means a document filed by a complainant or signed by the Title IX Coordinator alleging sexual harassment against a respondent and requesting that the District investigate the allegation of sexual harassment. At the time of filing a formal complaint, a complainant must be participating in or attempting to participate in the education program or activity of the District with which the formal complaint is filed. A formal complaint may be filed with the Title IX Coordinator in person, by mail, or by email, by using the contact information required to be listed for the Title IX Coordinator, and by any additional method designated by the District. As used in this paragraph, the phrase "document filed by a complainant" means a document or electronic submission (such as by email or through an online portal provided for this purpose by the District) that contains the complainant's physical or digital signature, or otherwise indicates that the complainant is the person filing the formal complaint. Where the Title IX Coordinator signs a formal complaint, the Title IX Coordinator is not a complainant or otherwise a party, and must comply with the requirements of law and regulation.
- e) "Respondent" means an individual who has been reported to be the perpetrator of conduct that could constitute sexual harassment.

SUBJECT: TITLE IX AND SEX DISCRIMINATION (Cont'd.)

f) "Supportive measures" means non-disciplinary, non-punitive individualized services offered as appropriate, as reasonably available, and without fee or charge to the complainant or the respondent before or after the filing of a formal complaint or where no formal complaint has been filed. These measures are designed to restore or preserve equal access to the District's education program or activity without unreasonably burdening the other party, including measures designed to protect the safety of all parties or the District's educational environment, or deter sexual harassment. Supportive measures may include counseling, extensions of deadlines or other course-related adjustments, modifications of work or class schedules, campus escort services, mutual restrictions on contact between the parties, changes in work or housing locations, leaves of absence, increased security and monitoring of certain areas of the campus, and other similar measures. The District must maintain as confidential any supportive measures provided to the complainant or respondent, to the extent that maintaining such confidentiality would not impair the ability of the District to provide the supportive measures. The Title IX Coordinator is responsible for coordinating the effective implementation of supportive measures.

General Requirements for the Investigative and Grievance Process

During the investigation of a formal complaint and throughout the grievance process, the District will ensure that:

- a) Complainants and respondents are treated equitably. This includes applying any provisions, rules, or practices incorporated into the District's grievance process, other than those required by law or regulation, equally to both parties.
- b) All relevant evidence is objectively evaluated, including both inculpatory and exculpatory evidence. Inculpatory evidence implicates or tends to implicate an individual in a crime or wrongdoing. Exculpatory evidence frees or tends to free an individual from blame or accusation.
- c) The Title IX Coordinator, investigator, decision-maker involved in the grievance process, or any person designated by the District to facilitate any informal resolution process does not have a conflict of interest or bias for or against complainants or respondents generally or an individual complainant or respondent.
- d) Respondents are presumed not to be responsible for the alleged conduct until a determination regarding responsibility is made at the conclusion of the grievance process.
- e) The grievance process, including any appeals or informal resolutions, is concluded within a reasonably prompt time frame and that the process is only temporarily delayed or extended for good cause. Good cause includes, but is not limited to, considerations such as the absence of a party, a party's advisor, or a witness; concurrent law enforcement activity; or the need for

SUBJECT: TITLE IX AND SEX DISCRIMINATION (Cont'd.)

language assistance or accommodation of disabilities. Whenever the time frame is temporarily delayed or extended, written notice will be provided to all complainants and respondents of the delay or extension and the reasons for the action.

- f) The range of possible disciplinary sanctions and remedies that may be implemented by the District following any determination regarding responsibility are described to any known party.
- g) The same standard of evidence is used to determine responsibility in all formal complaints.
- h) The procedures and permissible bases for an appeal are known to all complainants and respondents.
- i) The range of supportive measures available are known to all complainants and respondents.
- j) There is no requirement, allowance of, reliance on, or otherwise use of questions or evidence that constitute, or seek disclosure of, information protected under a legally recognized privilege, unless the person holding the privilege has waived the privilege.
- k) The burden of proof and the burden of gathering evidence sufficient to reach a determination regarding responsibility rests on the District and not on the parties.
- l) The Title IX Coordinator, the investigator, any decision-maker, or any other person participating on behalf the District does not access, consider, disclose, or otherwise use a party's records that are made or maintained by a physician, psychiatrist, psychologist, or other recognized professional or paraprofessional acting in the professional's or paraprofessional's capacity, or assisting in that capacity, and which are made and maintained in connection with the provision of treatment to the party, unless the District obtains that party's voluntary, written consent to do so for the grievance process. If the party is not an eligible student, as defined in FERPA as a student who has reached 18 years of age or is attending a post-secondary institution, the District will obtain the voluntary, written consent of a parent.
- m) The parties have an equal opportunity to present witnesses, including fact and expert witnesses, and other inculpatory and exculpatory evidence.
- n) Credibility determinations are not be based on a person's status as a complainant, respondent, or witness.
- o) The ability of either party to discuss the allegations under investigation or to gather and present relevant evidence is not restricted.
- p) The parties are provided with the same opportunities to have others present during any grievance proceeding, including the opportunity to be accompanied to any related meeting or proceeding by the advisor of their choice, who may be, but is not required to be, an attorney,

SUBJECT: TITLE IX AND SEX DISCRIMINATION (Cont'd.)

and not limit the choice or presence of advisor for any complainant or respondent in any meeting or grievance proceeding. However, the District may establish restrictions regarding the extent to which the advisor may participate in the proceedings, as long as the restrictions apply equally to both parties.

- q) Written notice of the date, time, location, participants, and purpose of all hearings, investigative interviews, or other meetings, is provided to any party whose participation is invited or expected with sufficient time for the party to prepare to participate.
- r) The parties are provided with equal opportunity to inspect and review any evidence obtained as part of the investigation that is directly related to the allegations raised in a formal complaint, including the evidence upon which the District does not intend to rely on in reaching a determination regarding responsibility and inculpatory or exculpatory evidence whether obtained from a party or other source, so that each party can meaningfully respond to the evidence prior to conclusion of the investigation.
- s) Any document sent to a minor or legally incompetent person is also sent to the party's parent or legal guardian.
- t) Any document sent to a party is also sent to the party's advisor, if known.

After a Report of Sexual Harassment Has Been Made

After receiving a report of sexual harassment, the Title IX Coordinator will:

- a) Promptly contact the complainant to discuss and offer supportive measures;
- b) Inform the complainant both of the range of supportive measures available and that these measures are available regardless of whether a formal complaint is filed;
- c) Consider the complainant's wishes with respect to supportive measures; and
- d) Explain to the complainant the process for filing a formal complaint.

The Title IX Coordinator may also contact the respondent to discuss and/or impose supportive measures.

Requests for confidentiality or use of anonymous reporting may limit how the District is able to respond to a report of sexual harassment.

SUBJECT: TITLE IX AND SEX DISCRIMINATION (Cont'd.)

Emergency Removal and Administrative Leave

At any point after receiving a report or formal complaint of sexual harassment, the District may immediately remove a respondent from the District's education program or activity on an emergency basis, provided that the District:

- a) Undertakes an individualized safety and risk analysis;
- b) Determines that an immediate threat to the physical health or safety of any student or other individual arising from the allegations of sexual harassment justifies removal; and
- c) Provides the respondent with notice and an opportunity to challenge the decision immediately following the removal.

The District should coordinate their Title IX compliance efforts with special education staff when initiating an emergency removal of a student with a disability from an education program or activity as the removal could constitute a change of placement under the IDEA or Section 504.

The District may place a non-student employee respondent on administrative leave with or without pay during the pendency of the grievance process in accordance with law and regulation and any applicable District policy, procedure, collective bargaining agreement, or other document such as the District's *Code of Conduct*.

Filing a Formal Complaint

A complainant may file a formal complaint with the Title IX Coordinator in person or by mail, email, or other method made available by the District. The complainant must be participating in or attempting to participate in the education program or activity of the District at the time of filing the complaint. The filing of a formal complaint initiates the grievance process.

A formal complaint must be signed by the complainant, the complainant's parent or legal guardian as appropriate, or the Title IX Coordinator. Where a parent or legal guardian signs the complaint, the parent or legal guardian does not become the complainant; rather the parent or legal guardian acts on behalf of the complainant. The Title IX Coordinator may sign the formal complaint, but his or her signature does not make him or her a complainant or a party to the complaint. If the formal complaint is signed by the Title IX Coordinator, the Title IX Coordinator is still obligated to comply with the grievance process outlined in this policy.

The complainant, or the complainant's parent or legal guardian, must physically or digitally sign the formal complaint, or otherwise indicate that the complainant is the person filing the formal complaint. When a formal complaint is filed, the Title IX Coordinator must send a written notice of allegations to all parties which includes the identities of all known parties.

SUBJECT: TITLE IX AND SEX DISCRIMINATION (Cont'd.)

The District will not discriminate on the basis of sex in its treatment of a complainant or a respondent in responding to a formal complaint of sexual harassment.

The formal complaint form may be obtained from the District's Title IX Coordinator or found on the District's website.

Consolidation of Formal Complaints

The District may consolidate formal complaints of sexual harassment against more than one respondent, or by more than one complainant against one or more respondents, or by one party against the other party, where the allegations of sexual harassment arise out of the same facts or circumstances.

Written Notice of Allegations

Upon receipt of a formal complaint, the District will send all known parties written notice of:

- a) The District's grievance process, including any informal resolution process; and
- b) The allegations of sexual harassment which will:
 - 1. Provide sufficient details known at the time and sufficient time to prepare a response before any initial interview. Sufficient details include the identities of the parties involved in the incident, if known, the conduct allegedly constituting sexual harassment, and the date and location of the alleged incident, if known;
 - 2. State that the respondent is presumed not to be responsible for the alleged conduct and that a determination regarding responsibility is made at the conclusion of the grievance process;
 - 3. Inform the parties that they may have an advisor of their choice, who may be, but is not required to be, an attorney;
 - 4. Inform the parties that they may inspect and review any evidence obtained as part of the investigation that is directly related to the allegations raised in the formal complaint; and
 - 5. Include notice of any provision in any applicable District policy, procedure, collective bargaining agreement, or other document such as the District's *Code of Conduct* that prohibits knowingly making false statements or knowingly submitting false information during the grievance process.

If, in the course of an investigation, the District decides to investigate allegations about any complainant or respondent that were not included in the initial notice, the District will provide another notice of the additional allegations to the parties whose identities are known.

SUBJECT: TITLE IX AND SEX DISCRIMINATION (Cont'd.)

Investigation of a Formal Complaint

The Title IX Coordinator will oversee the District's investigation of all formal complaints. During the investigation of a formal complaint, the Title IX Coordinator or another District employee may serve as the District's investigator. The District may also outsource all or part of an investigation to appropriate third parties. The outsourcing of all or part of an investigation does not relieve the District from its obligation to comply with law and regulation.

It is anticipated that most investigations will be completed within thirty (30) school days after receiving a formal complaint.

During the investigation of a formal complaint, the investigator will, as appropriate:

- a) Collect, review, and preserve all evidence including, but not limited to, any relevant documents, videos, electronic communications, and phone records.
- b) Interview all relevant persons including, but not limited to, any complainants, respondents, and witnesses. Interviews of complainants and respondents will be conducted separately. If a student is involved, the District will follow any applicable District policy, procedure, or other document such as the District's *Code of Conduct* regarding the questioning of students.
- c) Create written documentation of the investigation (such as a letter, memo, or email), which contains the following:
 - 1. A list of all documents reviewed, along with a detailed summary of relevant documents;
 - 2. A list of names of those interviewed, along with a detailed summary of their statements;
 - 3. A timeline of events; and
 - 4. A summary of prior relevant incidents, reported or unreported.
- d) Keep any written documentation and associated documents in a secure and confidential location.

Prior to completion of the investigative report, the District will send to each party and the party's advisor, if any, the evidence subject to inspection and review in an electronic format or a hard copy. The parties will have at least fifteen (15) calendar days to submit a written response, which the investigator will consider prior to completion of the investigative report.

SUBJECT: TITLE IX AND SEX DISCRIMINATION (Cont'd.)

At the end of the investigation, an investigative report will be created that fairly summarizes all relevant evidence.

At least ten (10) school days prior to a hearing or other determination regarding responsibility, the investigative report will be sent to each party and the party's advisor, if any, in an electronic format or a hard copy, for their review and written response.

Dismissal of a Formal Complaint

The District must investigate the allegations in a formal complaint. The District must dismiss a formal complaint under Title IX if the conduct alleged:

- a) Would not constitute sexual harassment even if proven;
- b) Did not occur in the District's education program or activity; or
- c) Did not occur against a person in the United States.

Further, the District may dismiss a formal complaint or any of its allegations under Title IX, if at any time during the investigation or hearing:

- a) A complainant notifies the Title IX Coordinator in writing that the complainant would like to withdraw the formal complaint or any of its allegations;
- b) The respondent is no longer enrolled or employed by the District; or
- c) Specific circumstances prevent the District from gathering evidence sufficient to reach a determination as to the formal complaint or any of its allegations.

Upon a dismissal of a formal complaint, the District must promptly send written notice of the dismissal and reason(s) for the dismissal simultaneously to the parties.

The dismissal of a formal complaint under Title IX does not preclude action under another related District policy, procedure, collective bargaining agreement, or other document such as the District's *Code of Conduct*.

Informal Resolutions

Before reaching a determination regarding responsibility, but only after a formal complaint is filed, the District may offer and facilitate the use of an informal resolution process, such as mediation, that does not involve a full investigation and adjudication of the formal complaint.

SUBJECT: TITLE IX AND SEX DISCRIMINATION (Cont'd.)

It is anticipated that most informal resolutions will be completed within 15 school days.

The District will not require that parties participate in an informal resolution process. The District will not offer or facilitate an informal resolution process to resolve allegations that an employee sexually harassed a student. Further, the District will not require the waiver of the right to an investigation and adjudication of formal complaints of sexual harassment as a condition of enrollment or continuing enrollment, or employment or continuing employment, or enjoyment of any other right.

If the District offers and facilitates the use of an informal resolution process, it will:

- a) Provide written notice to all known parties which details:
 - 1. The allegations in the formal complaint;
 - 2. The requirements of the informal resolution process including the circumstances under which it precludes the parties from resuming a formal complaint arising from the same allegations, provided, however, that at any time prior to agreeing to a resolution, any party has the right to withdraw from the informal resolution process and resume the grievance process with respect to the formal complaint;
 - 3. Any consequences resulting from participating in the informal resolution process, including the records that will be maintained or could be shared; and
- b) Obtain the parties' voluntary, written consent to the informal resolution process.

Hearings and Determination Regarding Responsibility

The District will designate an individual decision-maker or a panel of decision-makers to issue a written determination regarding responsibility. A decision-maker can either be a District employee or, where appropriate, a third-party. They cannot be the same individual as either the Title IX Coordinator or the investigator(s).

The District's grievance process may, but is not required to, provide for a hearing. The determination as to whether a hearing will be provided will be made on a case-by-case basis. If a hearing is provided, the District will make all evidence subject to the parties' inspection and review available to give each party equal opportunity to refer to this evidence during the hearing, including for purposes of cross-examination.

SUBJECT: TITLE IX AND SEX DISCRIMINATION (Cont'd.)

With or without a hearing, before reaching a determination regarding responsibility, the decision-maker(s) will afford each party the opportunity to:

- a) Submit written, relevant questions that a party wants asked of any party or witness within five (5) school days after the parties have received the investigative report;
- b) Provide each party with the answers given by any party or witness within three (3) calendar days of receipt of same; and
- c) Allow for additional, limited follow-up questions and responses from each party to occur within three (3) calendar days after the parties have received responses to their initial questions.

Questions and evidence about a complainant's sexual predisposition or prior sexual behavior will not be considered, unless the questions and evidence about the complainant's prior sexual behavior are offered to prove that someone other than the respondent committed the conduct alleged by the complainant, or if the questions and evidence concern specific incidents of the complainant's prior sexual behavior with respect to the respondent and are offered to prove consent. The decision-maker(s) will explain to the party proposing the questions any decision to exclude a question as not relevant.

The decision-maker(s) will issue a written determination regarding responsibility to the Title IX Coordinator, the Superintendent, and all parties simultaneously within three (3) school days after all follow-up questions have been responded to or after the hearing, if one has been provided.

To reach this determination, the decision-maker(s) will use the clear and convincing evidence standard which is the standard of evidence that will be applied in all formal complaints of sexual harassment. This standard is understood to mean concluding that a fact is highly probable to be true.

SUBJECT: TITLE IX AND SEX DISCRIMINATION (Cont'd.)

The written notice of the determination regarding responsibility will include:

- a) Identification of the allegations potentially constituting sexual harassment;
- b) A description of the procedural steps taken from the receipt of the formal complaint through the determination, including any notifications to the parties, interviews with parties and witnesses, site visits, methods used to gather other evidence, and hearings held;
- c) Findings of fact supporting the determination;
- d) Conclusions regarding the application of any applicable District policy, procedure, collective bargaining agreement, or other document such as the District's *Code of Conduct* to the facts;
- e) A statement of, and rationale for, the result as to each allegation, including a determination regarding responsibility, any disciplinary sanctions the District is imposing on the respondent, and whether remedies designed to restore or preserve equal access to the District's education program or activity will be provided by the District to the complainant; and
- f) The District's procedures and permissible bases for the complainant and respondent to appeal.

Finality of Determination Regarding Responsibility

The determination regarding responsibility becomes final either on the date that the District provides the parties with the written determination of the result of the appeal, if an appeal is filed, or if an appeal is not filed, the date on which an appeal would no longer be considered timely.

Where a determination regarding responsibility for sexual harassment has been made against the respondent, remedies will be provided to a complainant and disciplinary sanctions may be imposed on a respondent. Remedies will be designed to restore or preserve equal access to the District's education program or activity. Remedies and disciplinary sanctions will be implemented in accordance with applicable laws and regulations, as well as any District policy, procedure, collective bargaining agreement, or other document such as the District's *Code of Conduct*.

The Title IX Coordinator is responsible for the effective implementation of any remedies and/or disciplinary sanctions. The Title IX Coordinator will work with other individuals as necessary to effectively implement remedies and/or disciplinary sanctions.

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Community Relations

SUBJECT: TITLE IX AND SEX DISCRIMINATION (Cont'd.)

<u>Appeals</u>

Either party may file an appeal from a determination regarding responsibility or from the District's dismissal of a formal complaint or any of its allegations. Appeals must be submitted in writing to the Title IX Coordinator within thirty (30) calendar days of the written notice of the determination regarding responsibility or dismissal of the formal complaint or any of its allegations.

An appeal may only be based upon one or more of the following bases:

- a) Procedural irregularity that affected the outcome of the matter;
- b) New evidence that was not reasonably available at the time the determination regarding responsibility or dismissal was made, that could affect the outcome of the matter; and
- c) The Title IX Coordinator, investigator, or decision-maker(s) had a conflict of interest or bias for or against complainants or respondents generally or the individual complainant or respondent that affected the outcome of the matter.

The bases on which a party is seeking an appeal should be specifically stated in the party's written appeal.

Upon receipt of an appeal, the District will:

- a) Notify the other party in writing that an appeal has been filed and implement appeal procedures equally for both parties;
- b) Ensure that any decision-maker for the appeal:
 - 1. Is not the same person as any decision-maker that reached the initial determination regarding responsibility or dismissal, investigator, or Title IX Coordinator;
 - 2. Does not have any conflict of interest or bias for or against complainants or respondents generally or an individual complainant or respondent;
- c) Give all parties a reasonable, equal opportunity to submit a written statement in support of, or challenging, the outcome. Parties will have to submit these written statements within twenty (20) calendar days after the parties have been notified of the appeal;
- d) Issue a written decision describing the result of the appeal and the rationale for the result; and

SUBJECT: TITLE IX AND SEX DISCRIMINATION (Cont'd.)

e) Provide the written decision simultaneously to the Title IX Coordinator, the Superintendent, and all parties within thirty (30) calendar days after receiving the parties written statements in support of, or challenging, the outcome.

Prohibition of Retaliatory Behavior (Commonly Known as "Whistle-Blower" Protection)

The District prohibits retaliation against any individual for the purpose of interfering with his or her Title IX rights or because the individual made a report or complaint, testified, assisted, or participated or refused to participate in an investigation, proceeding, or hearing under Title IX.

Charging an individual with *Code of Conduct* or other applicable violations that do not involve sex discrimination, including sexual harassment, but arise out of the same facts or circumstances as a report or complaint of sex discrimination for the purpose of interfering with any right or privilege secured by Title IX, constitutes retaliation. Charging an individual with a *Code of Conduct* or other applicable violation for making a materially false statement in bad faith during a grievance proceeding does not constitute retaliation, provided, however, that a determination regarding responsibility, alone, is not sufficient to conclude that any party made a materially false statement in bad faith.

All complaints alleging retaliation will be handled in a manner consistent with the District's policies and procedures regarding the investigation of discrimination and harassment complaints, including Policy #3420 -- Non-Discrimination and Anti-Harassment in the District.

If the Title IX Coordinator is unavailable, including due to a conflict of interest or other disqualifying reason, the report will be directed to another Title IX Coordinator, if the District has designated another individual to serve in that capacity. If the District has not designated another Title IX Coordinator, the Superintendent will ensure that another person with the appropriate training and qualifications is appointed to act as the Title IX Coordinator.

Confidentiality

Except where disclosure may be permitted or required by law or regulation, the District will keep confidential the identity of any:

- a) Individual who has made a report or complaint of sex discrimination;
- b) Individual who has made a report or filed a formal complaint of sexual harassment;
- c) Complainant;
- d) Individual who has been reported to be the perpetrator of sex discrimination;

SUBJECT: TITLE IX AND SEX DISCRIMINATION (Cont'd.)

- e) Respondent; and
- f) Witness.

Training

The District will ensure that:

- a) All Title IX Coordinators, investigators, decision-makers, or persons who facilitate an informal resolution process receive training on:
 - 1. The definition of sexual harassment as defined in Title IX;
 - 2. The scope of the District's education program or activity;
 - 3. How to conduct an investigation and grievance process including hearings, appeals, and informal resolution processes, as applicable; and
 - 4. How to serve impartially, including by avoiding prejudgment of the facts at issue, conflicts of interest, and bias.
- b) All decision-makers receive training on any technology to be used at a live hearing and on issues of relevance of questions and evidence, including when questions and evidence about a complainant's sexual predisposition or prior sexual behavior are not relevant.
- c) All investigators receive training on issues of relevance to create an investigative report that fairly summarizes relevant evidence.
- d) All District employees receive training on mandatory reporting obligations and any other responsibilities that they may have relative to Title IX.

Materials used to train Title IX Coordinators, investigators, decision-makers, and any person who facilitates an informal resolution process will not rely on sex stereotypes and will promote impartial investigations and adjudications of formal complaints of sexual harassment. Training materials will be made publicly available on the District's website.

Notification

The District will notify students, parents or legal guardians of students, employees, applicants for employment, and all unions or professional organizations holding collective bargaining or professional agreements with the District of this policy.

SUBJECT: TITLE IX AND SEX DISCRIMINATION (Cont'd.)

Further, the District will prominently publish this policy and the contact information for the Title IX Coordinator(s) on its website and in other publications, including in each handbook or catalog that it makes available to the individuals and entities referenced above.

Recordkeeping

For a period of seven years, the District will retain the following:

- a) Records of each sexual harassment investigation including any:
 - 1. Determination regarding responsibility;
 - 2. Audio or audiovisual recording or transcript required under law or regulation;
 - 3. Disciplinary sanctions imposed on the respondent; and
 - 4. Remedies provided to the complainant designed to restore or preserve equal access to the District's education program or activity.
- b) Any appeal and its result.
- c) Any informal resolution and its result.
- d) All materials used to train Title IX Coordinators, investigators, decision-makers, and any person who facilitates an informal resolution process.
- e) For each response to sexual harassment where the District had actual knowledge of sexual harassment in its education program or activity against a person in the United States, records of any actions, including any supportive measures, taken in response to a report or formal complaint of sexual harassment. In each instance, the District must document the basis for its conclusion that its response was not deliberately indifferent, and document that it has taken measures designed to restore or preserve equal access to the District's education program or activity. If a District does not provide a complainant with supportive measures, then the District must document the reasons why such a response was not clearly unreasonable in light of the known circumstances. The documentation of certain bases or measures does not limit the District in the future from providing additional explanations or detailing additional measures taken.

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Community Relations

SUBJECT: TITLE IX AND SEX DISCRIMINATION (Cont'd.)

20 USC § 1092(f)(6)(A)(v) 20 USC § 1681, et. seq. 34 USC § 12291(a)(8, 10, and 30) 34 CFR Part 106 Education Law § 13 8 NYCRR § 100.2(kk)

NOTE: Refer also to Policies #3420 -- Non-Discrimination and Anti-Harassment in the District

#6121 -- Sexual Harassment in the Workplace

#7554 -- Dignity for All Students

District Code of Conduct

Non-Instructional/Business Operations

SUBJECT: RECORDS MANAGEMENT

A Records Management Officer shall be designated by the Superintendent, subject to the approval of the Board of Education. Such Records Management Officer shall coordinate the development of and oversee a program for the orderly and efficient management of records, including the legal disposition or destruction of obsolete records, and be given the authority and responsibility to work with other local officials at all levels in the development and maintenance of the records management program.

In addition, a Records Advisory Board may be created to assist in establishing and supporting the records management program. The District's legal counsel, the fiscal officer, and the Superintendent/designee may comprise the Advisory Board.

The Superintendent will designate a Records Management Officer, subject to Board approval, to develop and coordinate the District's orderly and efficient records management program. Among other aspects, this program includes the legal disposition or destruction of obsolete records and the storage and management of inactive records. The Records Management Officer will work with other District officials to develop and maintain this program.

The District may create a Records Advisory Board to assist in establishing and supporting the records management program. Members of this board may include the District's legal counsel, the fiscal officer, and the Superintendent or designee, among others.

Retention and Disposition of Records

The Superintendent shall retain records for such a period and dispose of them in the manner described in Records Retention and Disposition Schedule ED 1, established pursuant to Part 185, Title VIII of the Official Compilation of Codes, Rules and Regulations of the State of New York and Article 57 A of the Arts and Cultural Affairs Law.

Special Approvals for Disposition of Records Not Included in Schedule/Records Damaged by Natural or Manmade Disasters

Records not listed on a records retention and disposition schedule shall not be disposed of without the approval of the Commissioner of Education.

Records that have been damaged by natural or manmade disaster and constitute a human health or safety risk also require the Commissioner's prior approval before disposition.

The District will retain records and dispose of them in accordance with the Retention and Disposition Schedule for New York Local Government Records (LGS-1) or as otherwise approved by the Commissioner of Education. Further, if any law specifically provides a retention period longer than that established by this schedule, the retention period established by the law will govern.

Replacing Original Records with Microforms or Electronic Images

Digital images of public records may be stored on electronic media, and such electronic records may replace paper originals or micrographic copies of these records. To ensure accessibility and intelligibility for the life of these records, the School District shall follow the procedures prescribed by the Commissioner of Education.

The District will follow procedures prescribed by the Commissioner of Education to ensure accessibility for the life of any microform or electronic records that replace paper originals or micrographic copies.

Retention and Preservation of Electronic Records

The District shall ensure that records retention requirements are incorporated into any program, plan and process for design, redesign, or substantial enhancement of an information system that stores electronic records. The District will also ensure that electronic records are not rendered unusable because of changing technology before their retention and preservation requirements expire.

Arts and Cultural Affairs Law Section 57-a 8 New York Code of Rules and Regulations (NYCRR) Part 185

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Personnel

SUBJECT: EQUAL EMPLOYMENT OPPORTUNITY

Overview

The District is committed to creating and maintaining an environment which is free from discrimination and harassment. This policy addresses employment discrimination. It is just one component of the District's overall commitment to maintaining a discrimination and harassment-free educational and work environment.

Consistent with this commitment and in accordance with law and regulation, the District is an equal opportunity employer that does not discriminate against any employee or applicant for employment in its programs and activities on the basis of any legally protected class or category including, but not limited to: age; race; creed; religion; color; national origin; sexual orientation; gender identity or expression; military status; sex; disability; predisposing genetic characteristics; familial status; marital status; status as a victim of domestic violence; and criminal arrest or conviction record.

The District adopts this policy as part of its effort to provide for the prompt and equitable resolution of complaints of employment discrimination. The District will promptly respond to reports of employment discrimination, ensure that all investigations are conducted within a reasonably prompt time frame and under a predictable fair grievance process that provides due process protections, and impose disciplinary measures and implement remedies when warranted.

Inquiries about this policy may be directed to the District's Civil Rights Compliance Officer(s) (CRCO(s)).

Reporting Allegations of Employment Discrimination

Any person may report employment discrimination regardless of whether they are the alleged victim or not. Reports of employment discrimination may be made orally or in writing to the District's CRCO or any other District employee including, but not limited to, a supervisor or building principal.

All District employees who witness or receive an oral or written report of employment discrimination must immediately inform the CRCO. Failure to immediately inform the CRCO may subject the employee to discipline up to and including termination. If the CRCO is unavailable, including due to a conflict of interest or other disqualifying reason, the report will be directed to another CRCO, if the District has designated another individual to serve in that capacity. If the District has not designated another CRCO, the Superintendent will ensure that another person with the appropriate training and qualifications is appointed to act as the CRCO.

Additionally, District employees must comply with reporting requirements in any other applicable District policy or document. Applicable policies or documents may include: Policy #3420 -- Non-Discrimination and Anti-Harassment in the District.

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Personnel

SUBJECT: EQUAL EMPLOYMENT OPPORTUNITY (Cont'd.)

Grievance Process for Complaints of Employment Discrimination

The District will act to promptly, thoroughly, and equitably investigate all complaints, whether oral or written, of employment discrimination and will promptly take appropriate action to protect individuals from further discrimination.

Various District policies and documents address employment discrimination. These policies and documents may include: Policy #3420 -- Non-Discrimination and Anti-Harassment in the District. All complaints will be handled in accordance with the applicable District policies and/or documents.

The determination as to which District policies and/or documents are applicable is fact specific, and the CRCO may work with other District staff to determine which District policies and/or documents are applicable to the specific facts of the complaint.

If an investigation reveals that employment discrimination has occurred, the District will take immediate corrective action as warranted. This action will be taken in accordance with applicable law and regulation, as well as any applicable District policy, regulation, procedure, collective bargaining agreement, third-party contract, or other document such as the District's *Code of Conduct*.

Prohibition of Retaliatory Behavior (Commonly Known as "Whistle-Blower" Protection)

The District prohibits retaliation against any individual because the individual made a report or complaint, testified, assisted, or participated or refused to participate in an investigation, proceeding, or hearing related to a complaint of employment discrimination.

Complaints of retaliation may be directed to the CRCO. If the CRCO is unavailable, including due to a conflict of interest or other disqualifying reason, the report will be directed to another CRCO, if the District has designated another individual to serve in that capacity. If the District has not designated another CRCO, the Superintendent will ensure that another person with the appropriate training and qualifications is appointed to act as the CRCO.

Where appropriate, follow-up inquiries will be made to ensure that the discrimination has not resumed and that those involved in the investigation have not suffered retaliation.

8 USC § 1324b 29 USC § 206 42 USC § 1981

Age Discrimination in Employment Act of 1967 (ADEA), 29 USC § 621 et seq. Americans with Disabilities Act (ADA), 42 USC § 12101 et seq. Genetic Information Non-Discrimination Act (GINA), 42 USC § 2000ff et seq. National Labor Relations Act (NLRA), 29 USC § 151 et seq. Section 504 of the Rehabilitation Act of 1973, 29 USC § 790 et seq.

SUBJECT: EQUAL EMPLOYMENT OPPORTUNITY (Cont'd.)

Title VI of the Civil Rights Act of 1964, 42 USC § 2000d et seq.

Title VII of the Civil Rights Act of 1964, 42 USC § 2000e et seq.

Title IX of the Education Amendments Act of 1972, 20 USC § 1681 et seq.

Uniformed Services Employment and Reemployment Rights Act (USERRA), 38 USC § 4301 et seq.

28 CFR Part 35

29 CFR Chapter I – National Labor Relations Board

29 CFR Chapter XIV – Equal Employment Opportunity Commission

34 CFR Parts 100, 104, and 106

45 CFR Part 86

Civil Rights Law §§ 40, 40-a, 40-c, 47-a, 47-b, and 48-a

Civil Service Law §§ 75-b and 115

Correction Law § 752

Labor Law §§ 194-a, 201-d, 201-g, 203-e, 206-c, and 215

New York State Human Rights Law, Executive Law § 290 et seq.

Military Law §§ 242, 243, and 318

9 NYCRR § 466 et seq.

NOTE:

Refer also to Policies

#3420 -- Non-Discrimination and Anti-Harassment in the District

#6121 -- Sexual Harassment in the Workplace

#6122 – Complaints and Grievances by Employees

SUBJECT: EQUAL EMPLOYMENT OPPORTUNITY

It is the policy of this District to provide, through a positive and effective program, equal opportunities for employment, retention and advancement of all people regardless of race, color, ereed, religion, national origin, political affiliation, sex, sexual orientation, age, marital status, military status, veteran status, disability, predisposing genetic characteristics, or use of a recognized guide dog, hearing dog or service dog.

— Sexual orientation is defined as heterosexuality, homosexuality, bisexuality or asexuality, whether actual or perceived.

The term "military status" means a person's participation in the military service of the United States or the military service of the state, including but not limited to, the armed forces of the United States, the army national guard, the air national guard, the New York naval militia, the New York guard, and such additional forces as may be created by the federal or state government as authorized by law.

Provisions will be provided for the publication and dissemination, internally and externally of this policy to ensure its availability to interested citizens and groups.

Additionally, administration shall establish grievance procedures that provide for the prompt and equitable resolution of complaints alleging discrimination. Those intending to file a grievance due to alleged discrimination must follow the grievance procedure as established by the District.

Prohibition of Retaliatory Behavior

The Board prohibits any retaliatory behavior directed against complainants, victims, witnesses, and/or any other individuals who participated in the investigation of a complaint of discrimination. Follow-up inquiries shall be made to ensure that discrimination has not resumed and that all those involved in the investigation of the discrimination complaint have not suffered retaliation.

Age Discrimination in Employment Act, 29 United States Code (USC) Section 621

Americans With Disabilities Act, 42 United States Code (USC) Section 12101 et seq

Prohibits discrimination on the basis of disability.

Genetic Information Nondiscrimination Act of 2008 (GINA) Public Law 110-22

Prohibits discrimination in the workplace based upon genetic information.

Section 504 of the Rehabilitation Act of 1973, 29 United States Code (USC) Section 794 et seq.

Title VI of the Civil Rights Act of 1964, 42 United States Code (USC) Section 2000d et seq.

Prohibits discrimination on the basis of race, color or national origin.

Title VII of the Civil Rights Act of 1964, 42 United States Code (USC) Section 2000c et seq.

Prohibits discrimination on the basis of race, color, religion, sex or national origin.

Title IX of the Education Amendments of 1972, 20 United States Code (USC) Section 1681 et seq.

Prohibits discrimination on the basis of sex.

Civil Rights Law Section 40-e

-Prohibits discrimination on the basis of race, creed, color, national origin, sex, sexual orientation, marital

status or disability.

Executive Law Section 290 et seq.

-Prohibits discrimination on the basis of age, race, creed, color, national origin, sex, sexual orientation, disability, military status, predisposing genetic characteristics, marital status, or use of a recognized military dog, bearing dog or service dog.

Military Law Sections 242 and 243

SUBJECT: SEXUAL HARASSMENT IN THE WORKPLACE

Overview

The District is committed to **creating and** maintaining an **environment which is free from** discrimination—free work environment and harassment. Sexual harassment is one form of workplace discrimination. This policy addresses sexual harassment in the workplace.—and—is It is just one component of the District's **overall** commitment to a discrimination and harassment-free educational and work environment.

Sexual harassment is a form of employee misconduct, a violation of District policy, and unlawful. Employees of every level who engage in sexual harassment, including supervisory personnel who engage in sexual harassment, who knowingly allow such behavior to continue, or fail to report suspected sexual harassment will be subject to remedial and/or disciplinary action by the District. Sexual harassment may also subject the District to liability for harm to targets of sexual harassment. Harassers may also be individually subject to liability.

The District adopts this policy as part of its effort to provide for the prompt and equitable resolution of complaints of sexual harassment in the workplace. The District will promptly respond to reports of sexual harassment in the workplace, ensure that all investigations are conducted within a reasonably prompt time frame and under a predictable fair grievance process that provides due process protections, and impose disciplinary measures and implement remedies when warranted.

Inquiries about this policy may be directed to the District's Civil Rights Compliance Officer(s) (CRCO(s)) and/or Title IX Coordinator(s).

Scope and Application

This policy applies to all instances of sexual harassment perpetrated against a "covered person," regardless of immigration status, by anyone in the workplace, including a co-worker, supervisor, or third-party such as a non-employee, paid or unpaid intern, vendor, building security, visitor, volunteer, parent, or student. For purposes of this policy, a "covered person" includes:

- a) Employees;
- b) Applicants for employment;
- c) Paid or unpaid interns; and
- d) Non-employees, which include anyone who is (or is employed by) a contractor, subcontractor, vendor, consultant, or other person providing services pursuant to a contract in the workplace.

SUBJECT: SEXUAL HARASSMENT IN THE WORKPLACE (Cont'd.)

Sexual harassment in the workplace can occur between any individuals, regardless of their sex or gender. Unlawful sexual harassment is not limited to the physical workplace itself. Sexual harassment can occur on school grounds, school buses or District vehicles, and at school-sponsored events, programs, or activities, including those that take place at locations off school premises school property and at school functions which, for purposes of this policy, means a school-sponsored or school-authorized extracurricular event or activity regardless of where the event or activity takes place, including any event or activity that may take place virtually or in another state. It can also occur while employees are traveling for District business. Calls, texts, emails, and social media usage can constitute unlawful workplace harassment, even if they occur away from school grounds property, on personal devices, or during non-work hours. Accordingly, conduct or incidents of sexual harassment that create or foreseeably create a disruption within the District may be subject to this policy in certain circumstances.

Other District policies and documents such as regulations, procedures, collective bargaining agreements, and the District's *Code of Conduct* may address misconduct related to sexual harassment and may provide for additional, different, or more specific grievance procedures depending on a number of factors including, but not limited to, who is involved and where the alleged sexual harassment occurred. These documents must be read in conjunction with this policy. Applicable policies or documents may include: Policy #3420 -- Non-Discrimination and Anti-Harassment in the District; and Policy #3421 -- Title IX and Sex Discrimination.

The dismissal of a complaint under one policy or document does not preclude action under another related District policy or document.

What Constitutes Sexual Harassment

Sexual harassment is a form of sex discrimination and is unlawful under federal, state, and (where applicable) local law. Sexual harassment includes harassment on the basis of sex, sexual orientation, self-identified or perceived sex, gender expression, gender identity, and the status of being transgender.

Sexual harassment includes unwelcome conduct which is either of a sexual nature, or which is directed at an individual because of that individual's sex when:

- a) Such conduct has the purpose or effect of unreasonably interfering with an individual's work performance or creating an intimidating, hostile or offensive work environment, even if the reporting individual is not the intended target of the sexual harassment;
- b) Such conduct is made either explicitly or implicitly a term or condition of employment; or

SUBJECT: SEXUAL HARASSMENT IN THE WORKPLACE (Cont'd.)

c) Submission to or rejection of such conduct is used as the basis for employment decisions affecting an individual's employment.

Under New York State Human Rights Law, sexual harassment is unlawful when it subjects an individual to inferior terms, conditions, or privileges of employment. Harassment need not be severe or pervasive to be unlawful, and can be any harassing conduct that consists of more than petty slights or trivial inconveniences.

A sexually harassing hostile work environment includes, but is not limited to, words, signs, jokes, pranks, intimidation or physical violence which are of a sexual nature, or which are directed at an individual because of that individual's sex. Sexual harassment also consists of any unwanted verbal or physical advances, sexually explicit derogatory statements or sexually discriminatory remarks made by someone which are offensive or objectionable to the recipient, which cause the recipient discomfort or humiliation, which interfere with the recipient's job performance.

Sexual harassment also occurs when a person in authority tries to trade job benefits for sexual favors. This can include hiring, promotion, continued employment or any other terms, conditions or privileges of employment. This is also called "quid pro quo" harassment.

Any covered person who feels harassed should report the conduct so that any violation of this policy can be corrected promptly. Any harassing conduct, even a single incident, can be addressed under this policy.

Examples of Sexual Harassment

The following describes some actions that may constitute unlawful sexual harassment and that are strictly prohibited:

- a) Physical acts of a sexual nature, such as:
 - 1. Touching, pinching, patting, kissing, hugging, grabbing, brushing against another person's body or poking another person's body; and
 - 2. Rape, sexual battery, molestation or attempts to commit these assaults.
- b) Unwanted sexual advances or propositions, such as:
 - 1. Requests for sexual favors accompanied by implied or overt threats concerning the target's job performance evaluation, a promotion or other job benefits or detriments; and
 - 2. Subtle or obvious pressure for unwelcome sexual activities.
- c) Sexually oriented gestures, noises, remarks or jokes, or comments about a person's sexuality or sexual experience, which create a hostile work environment.

SUBJECT: SEXUAL HARASSMENT IN THE WORKPLACE (Cont'd.)

- d) Sex stereotyping, which occurs when conduct or personality traits are considered inappropriate simply because they may not conform to other people's ideas or perceptions about how individuals of a particular sex should act or look.
- e) Sexual or discriminatory displays or publications anywhere in the workplace, such as pictures, posters, calendars, graffiti, objects, promotional material, reading materials, or other materials that are sexually demeaning or pornographic. This includes such sexual displays on workplace computers or cell phones and sharing such displays while in the workplace.
- f) Hostile actions taken against an individual because of that individual's sex, sexual orientation, gender identity, and the status of being transgender, such as:
 - 1. Interfering with, destroying or damaging a person's workstation, tools or equipment, or otherwise interfering with the individual's ability to perform the job;
 - 2. Sabotaging an individual's work; and
 - 3. Bullying, yelling, or name-calling.

Prohibition of Retaliatory Behavior (Whistle-Blower Protection)

Unlawful retaliation can be any action that could discourage a covered person from coming forward to make or support a sexual harassment claim. Adverse action need not be job-related or occur in the workplace to constitute unlawful retaliation (e.g., threats of physical violence outside of work hours).

The District prohibits any retaliatory behavior directed against complainants, victims, witnesses, and/or any other individuals who participate in the investigation of a complaint of sexual harassment. Such retaliation is unlawful under federal, state, and (where applicable) local law. The New York State Human Rights Law protects any individual who has engaged in "protected activity." Protected activity occurs when a person has:

- a) Made a complaint of sexual harassment, either internally or with any anti-discrimination agency;
- b) Testified or assisted in a proceeding involving sexual harassment under the Human Rights Law or other anti-discrimination law;
- c) Opposed sexual harassment by making an verbal-oral or informal complaint of harassment to a supervisor, building principal, other administrator, or the Civil Rights Compliance Officer (CRCO);

SUBJECT: SEXUAL HARASSMENT IN THE WORKPLACE (Cont'd.)

- d) Reported that another employee has been sexually harassed; or
- e) Encouraged a fellow employee to report harassment.

Even if the alleged harassment does not turn out to rise to the level of a violation of law, the individual is protected from retaliation if the person had a good faith belief that the practices were unlawful. However, the retaliation provision is not intended to protect persons making intentionally false charges of harassment.

Reporting Allegations of Sexual Harassment

Preventing sexual harassment is everyone's responsibility. The District cannot prevent or remedy sexual harassment unless it knows about it. Any covered person who has been subjected to behavior that may constitute sexual harassment is encouraged to report such behavior to a supervisor, building principal, other administrator, or the CRCO. Anyone who witnesses or becomes aware of potential instances of sexual harassment should report such behavior.

Reports of sexual harassment may be made verbally or ally or in writing. A form for submission of a written complaint is posted on the District website, and all covered persons are encouraged to use this complaint form. Persons who are reporting sexual harassment on behalf of another person should use the complaint form and note that it is being submitted on another person's behalf.

District employees must comply with reporting requirements in any other applicable District policy or document. Applicable policies or documents may include: Policy #3420 -- Non-Discrimination and Anti-Harassment in the District; and Policy #3421 -- Title IX and Sex Discrimination.

Any person who believes they have been a target of sexual harassment may also seek assistance in other available forums, as explained below in the section on Legal Protections in this policy.

Supervisory Responsibilities

All supervisors, building principals, and other administrators who receive a complaint or information about suspected sexual harassment, observe what may be sexually harassing behavior or for any reason suspect that sexual harassment is occurring, are required to report such suspected sexual harassment to the CRCO. In the event the CRCO is the alleged harasser, the report will be directed to another CRCO, if the District has designated another individual to serve in that capacity, or to the Superintendent. If the CRCO is unavailable, including due to a conflict of interest or other disqualifying reason, the report will be directed to another CRCO, if the District has designated another individual to serve in that capacity. If the District has not designated another CRCO, the Superintendent will ensure that another person with the appropriate training and qualifications is appointed to act as the CRCO.

SUBJECT: SEXUAL HARASSMENT IN THE WORKPLACE (Cont'd.)

In addition to being subject to discipline if they engaged in sexually harassing conduct themselves, supervisors, building principals, and other administrators will be subject to discipline for failing to report suspected sexual harassment or otherwise knowingly allowing sexual harassment to continue.

Supervisors, building principals, and other administrators will also be subject to discipline for engaging in any retaliation.

Investigating Complaints of Sexual Harassment

All complaints or information about sexual harassment will be investigated, whether that information was reported in verbal or written form. Investigations will be conducted in a timely manner, and will be confidential to the extent possible.

An investigation of any complaint, information or knowledge of suspected sexual harassment will be prompt and thorough, commenced immediately and completed as soon as possible. The investigation will be kept confidential to the extent possible. Disclosure may, however, be necessary to complete a thorough investigation of the charges and/or notify law enforcement officials. All persons involved, including complainants, witnesses, and alleged harassers will be accorded due process, as outlined below, and in accordance with any applicable collective bargaining agreements to protect their rights to a fair and impartial investigation.

The District will not tolerate retaliation against anyone who files complaints, supports another's complaint, or participates in an investigation regarding a violation of this policy.

While the process may vary from case to case, investigations should be done in accordance with the following steps:

- a) a) Upon receipt of a complaint, the CRCO will conduct an immediate review of the allegations, and take any interim actions (e.g., instructing the respondent to refrain from communications with the complainant), as appropriate. In the event that the CRCO is the alleged harasser, the complaint will be directed to another CRCO or District designee for investigation.
 - If the CRCO is unavailable, including due to a conflict of interest or other disqualifying reason, the report will be directed to another CRCO, if the District has designated another individual to serve in that capacity. If the District has not designated another CRCO, the Superintendent will ensure that another person with the appropriate training and qualifications is appointed to act as the CRCO.
- b) If a complaint is verbal, encourage the individual to complete the complaint form, which is available on the District website, in writing. If he or she refuses, prepare a complaint form based on the verbal reporting. All complaints of sexual harassment will be investigated regardless of the form in which those complaints are made. For oral complaints, the individual will be encouraged to complete the complaint form, which is available on the District website, in writing. If he or she refuses, a complaint form based on the oral report will be prepared. The complainant will be provided a copy of the completed complaint form.

SUBJECT: SEXUAL HARASSMENT IN THE WORKPLACE (Cont'd.)

- c) If documents, emails, or phone records are relevant to the investigation, take steps to obtain and preserve them.
- d) Request and review all relevant documents, including all electronic communications.
- e) Interview all parties involved, including any relevant witnesses. If a student is involved, the District will follow all applicable District policies and procedures regarding questioning students.
- f) Create written documentation of the investigation (such as a letter, memo or email), which contains the following:
 - 1. A list of all documents reviewed, along with a detailed summary of relevant documents;
 - 2. A list of names of those interviewed, along with a detailed summary of their statements;
 - 3. A timeline of events;
 - 4. A summary of prior relevant incidents, reported or unreported; and
 - 5. The basis for the decision and final resolution of the complaint, together with any corrective action(s).
- g) Keep the written documentation and associated documents in a secure and confidential location.
- h) Promptly notify the individual who reported and the individual(s) about whom the complaint was made of the final determination and implement any corrective actions identified in the written document.
- i) i)—Inform the individual who reported of the right to file a complaint or charge externally as outlined in the next section this policy.

Additionally, other District policies and documents address sexual harassment. These policies and documents may include: Policy #3420 -- Non-Discrimination and Anti-Harassment in the District; and Policy #3421 -- Title IX and Sex Discrimination. All complaints will be handled in accordance with the applicable District policies and/or documents.

The determination as to which District policies and/or documents are applicable is fact specific, and the CRCO may work with other District staff such as the District's Title IX Coordinator(s) to determine which District policies and/or documents are applicable to the specific facts of the complaint.

SUBJECT: SEXUAL HARASSMENT IN THE WORKPLACE (Cont'd.)

If an investigation reveals that discrimination or harassment sexual harassment has occurred, the District will take immediate corrective action as warranted. This action will be taken in accordance with applicable laws and regulations, as well as any and all relevant codes of conduct, District policies and administrative regulations, collective bargaining agreements, and/or third-party contracts. applicable District policy, regulation, procedure, collective bargaining agreement, third-party contract, or other document such as the District's Code of Conduct.

Annual Training

The District will provide a sexual harassment prevention training program to all employees on an annual basis. The training will be interactive and will include:

- a) An explanation of sexual harassment consistent with guidance issued by the Department of Labor in consultation with the Division of Human Rights;
- b) Examples of conduct that would constitute unlawful sexual harassment;
- c) Information concerning the federal and state statutory provisions concerning sexual harassment and remedies available to victims of sexual harassment;
- d) Information concerning employees' rights of redress and all available forums for adjudicating complaints; and
- e) Information addressing conduct by supervisors and any additional responsibilities for such supervisors.

Notice Notification

The District will provide this policy to all employees in writing. The District will post this policy prominently throughout the District to the extent practicable.

At the time of hiring and at every annual sexual harassment prevention training program, the District will provide each employee a notice containing this policy and the information presented at the District's sexual harassment prevention training program.

This notice will be provided in English and in the language identified by the employee as his or her primary language, provided that the New York State Department of Labor Commissioner has published a template of the model materials in that language.

The notice will be delivered in writing, either in print or digitally. The notice will either link to or include, as an attachment or printed copy, the policy and training materials.

SUBJECT: SEXUAL HARASSMENT IN THE WORKPLACE (Cont'd.)

Legal Protections and External Remedies

Sexual harassment is not only prohibited by the District but is also prohibited by state, federal, and, where applicable, local law.

Aside from the District's internal process, individuals may also choose to pursue legal remedies with the following governmental entities. While a private attorney is not required to file a complaint with a governmental agency, an individual may seek the legal advice of an attorney.

In addition to those outlined below, individuals may have additional legal protections.

State Human Rights Law (HRL)

The Human Rights Law (HRL), codified as N.Y. Executive Law, art. 15, § 290 et seq., applies to all employers in New York State with regard to sexual harassment, and protects covered persons, regardless of immigration status. A complaint alleging violation of the Human Rights Law HRL may be filed either with the Division of Human Rights (DHR) or in New York State Supreme Court.

Complaints with DHR may be filed any time within one year (three years beginning August 12, 2020) of the harassment. If an individual did not file with DHR, they can sue directly in state court under the HRL, within three years of the alleged sexual harassment. An individual may not file with DHR if they have already filed a HRL complaint in state court.

Complaining internally to the District does not extend your the time to file with DHR or in court. The one year or three years is counted from the date of the most recent incident of harassment.

Individuals do not need an attorney to file a complaint with DHR, and there is no cost to file with DHR.

DHR will investigate your_the complaint and determine whether there is probable cause to believe that sexual harassment has occurred. Probable cause cases are forwarded to a public hearing before an administrative law judge. If sexual harassment is found after a hearing, DHR has the power to award relief, which varies but may include requiring your employerthe District =to take action to stop the harassment, or redress the damage caused, including paying of monetary damages, attorney's fees and civil fines.

DHR's main office contact information is: NYS Division of Human Rights, One Fordham Plaza, Fourth Floor, Bronx, New York 10458. Individuals may call (718) 741-8400 or visit: www.dhr.ny.gov.

Contact DHR at (888) 392-3644 or visit dhr.ny.gov/complaint for more information about filing a complaint. The website has a complaint form that can be downloaded, filled out, notarized and mailed to DHR. The website also contains contact information for DHR's regional offices across New York State.

SUBJECT: SEXUAL HARASSMENT IN THE WORKPLACE (Cont'd.)

Civil Rights Act of 1964

The United States Equal Employment Opportunity Commission (EEOC) enforces federal anti-discrimination laws, including Title VII of the 1964 federal Civil Rights Act (codified as 42 USC § 2000e et seq.). An individual can file a complaint with the EEOC anytime within 300 days from the harassment. There is no cost to file a complaint with the EEOC. The EEOC will investigate the complaint, and determine whether there is reasonable cause to believe that discrimination has occurred, at which point the EEOC will issue a Right to Sue letter permitting the individual to file a complaint in federal court.

The EEOC does not hold hearings or award relief, but may take other action including pursuing cases in federal court on behalf of complaining parties. Federal courts may award remedies if discrimination is found to have occurred. In general, private employers must have at least 15 employees to come within the jurisdiction of the EEOC.

An individual alleging discrimination at work can file a "Charge of Discrimination." The EEOC has district, area, and field offices where complaints can be filed. Contact the EEOC by calling 1-800-669-4000 (TTY: 1-800-669-6820), visiting their website at www.eeoc.gov or via email at info@eeoc.gov.

If an individual filed an administrative complaint with DHR, DHR will file the complaint with the EEOC to preserve the right to proceed in federal court.

Title IX

Title IX of the Education Amendments of 1972 prohibits discrimination on the basis of sex in any federally funded education program or activity. The U.S. Department of Education's Office for Civil Rights (OCR) enforces Title IX of the Education Amendments of 1972.

For more information about how to file a complaint, contact OCR at 800-421-3481 (TDD 800-877-8339) or visit: https://www2.ed.gov/about/offices/list/ocr/docs/howto.html. The website contains information about filing the complaint online, by mail, or by email.

Local Protections

Many localities enforce laws protecting individuals from sexual harassment and discrimination. An individual should contact the county, city or town in which they live to find out if such a law exists.

Local Police Department

If the harassment involves unwanted physical touching, coerced physical confinement or coerced sex acts, the conduct may constitute a crime. Contact the local police department.

SUBJECT: SEXUAL HARASSMENT IN THE WORKPLACE (Cont'd.)

Title VII of the Civil Rights Act of 1964, 42 USC § 2000e et seq.

Title IX of the Education Amendments Act of 1972, 20 USC § 1681 et seq.

29 CFR § 1604.11(a)

34 CFR Subtitle B, Chapter I

Civil Service Law § 75-Bb

Executive Law Article 15 New York State Human Rights Law, Executive Law § 290 et seq.

Labor Law § 201-g

NOTE: Refer also to Policies #3420 -- Non-Discrimination and Anti-Harassment in the District

#3421 - Title IX and Sex Discrimination

#6122 -- Complaints and Grievances by Employees

#7551 -- Sexual Harassment of Students

2021 6190

Personnel

SUBJECT: EMPLOYEE USE OF SOCIAL MEDIA

The Board respects the importance of integrating current technology tools, including new methods of electronic communication, into the classroom to enhance student learning. It further recognizes the importance of employees, students and parents engaging, learning, collaborating and sharing in digital environments as part of 21st Century learning.

The Board strives to ensure that electronic communication tools incorporated into the school curriculum are used responsibly and safely. As practicable, the Board will provide access to secure social media tools and Board-approved technologies for use during instructional time and for school-sponsored initiatives in accordance with District policies.

The Board acknowledges that school employees may determine to engage in the use of Social Network Sites (SNS) during their personal time. School employees who use SNS for personal purposes must be mindful that they are responsible for their public conduct even when not acting in their capacities as school system employees. All school employees, including student teachers and affiliated independent contractors shall comply with the requirements of this policy when using electronic social media for personal purposes. Examples of SNS include, but are not limited to Facebook, Twitter, YouTube, Google+, and Instagram.

District Policies, Rules and Regulations

Employees are expected to follow all District policies, rules and regulations when utilizing SNS. The same laws, professional expectations and guidelines for interactions with students, fellow employees and use of District emblems and identifying characteristics apply online as in the "real world." Employees may be personally liable for anything posted to a SNS to the same extent that they would be for any other professional action.

Personal Use and Responsibility

While mindful of employees' First Amendment free speech rights, District personnel who participate in SNS, including the District social networking sites, shall not post any material which may result in the disruption of academic or other District activities.

Comments related to the District should always meet the highest standards of professional discretion. When posting, employees should act on the assumption that all postings are in the public domain. Remember that posted information could be interpreted as an extension of your office or classroom-what is inappropriate in your office or classroom is also inappropriate online. When posting comments or viewpoints on topics related to the District using any online medium, it is to be stated that the submission is representative of the writer's views and opinions and not necessarily the views and opinions of the District.

Disciplinary Sanctions

District personnel who violate any provision of this policy shall be subject to appropriate disciplinary measures up to and including termination of employment in accordance with legal guidelines, District policy and regulations, and the applicable collective bargaining agreement.

SUBJECT: SEXUAL HARASSMENT OF STUDENTS

Overview

The District is committed to creating and maintaining an environment which is free from discrimination and harassment. This policy addresses sexual harassment of students. It is just one component of the District's overall commitment to maintaining a discrimination and harassment-free educational and work environment.

Consistent with this commitment and in accordance with law and regulation, the District prohibits all forms of sexual harassment of students by any individual on school property and at school functions which, for purposes of this policy, means a school-sponsored or school-authorized extracurricular event or activity regardless of where the event or activity takes place, including any event or activity that may take place virtually or in another state.

The District adopts this policy as part of its effort to provide for the prompt and equitable resolution of complaints of sexual harassment of students. The District will promptly respond to reports of sexual harassment of students, ensure that all investigations are conducted within a reasonably prompt time frame and under a predictable fair grievance process that provides due process protections, and impose disciplinary measures and implement remedies when warranted.

Inquiries about this policy may be directed to the District's Civil Rights Compliance Officer(s) (CRCO(s)), Title IX Coordinator(s), and/or the Dignity Act Coordinator(s) (DAC(s)).

What Constitutes Sexual Harassment

Sexual harassment is a form of sex discrimination and is unlawful. It includes harassment on the basis of sex, sexual orientation, self-identified or perceived sex, gender expression, gender identity, and the status of being transgender. Sexual harassment can occur between any individuals, regardless of their sex or gender.

Generally stated, sexual harassment consists of subjecting an individual to unwelcome conduct which is either of a sexual nature or which is directed at an individual because of that individual's sex.

This conduct may, among other things, have the purpose or effect of: creating an intimidating, hostile, or offensive environment; substantially or unreasonably interfering with a student's educational performance, opportunities, benefits, or well-being; or otherwise adversely affecting a student's educational opportunities. Petty slights or trivial inconveniences generally do not constitute harassing conduct.

Determinations as to whether conduct or an incident constitutes sexual harassment will be made consistent with applicable law and regulation, as well as any applicable District policy, regulation, procedure, or other document such as the District's *Code of Conduct*. The examples below are intended to serve as a general guide for individuals in determining what may constitute sexual harassment. These examples should not be construed to add or limit the rights that students possess as a matter of law.

SUBJECT: SEXUAL HARASSMENT OF STUDENTS (Cont'd.)

Examples of Sexual Harassment

Sexual harassment can be verbal, non-verbal, or physical. Examples of this conduct may include, but are not limited to, the following:

- a) Unwanted physical acts of a sexual nature, such as:
 - 1. Touching, pinching, patting, kissing, hugging, grabbing, brushing against another person's body, or poking another person's body; and
 - 2. Rape, sexual battery, molestation, or attempts to commit these assaults.
- b) Engaging in sexual conduct with an individual who is unable to consent due to age, use of drugs or alcohol, intellectual disability, or other disability.
- c) Unwanted sexual advances or propositions, such as:
 - 1. Demanding sexual favors of a student, insinuating that refusal to acquiesce to such favors will adversely affect a student's grades, references, academic or scholastic placement, and/or participation in extracurricular activities; and
 - 2. Subtle or obvious pressure for unwelcome sexual activities.
- d) Verbal abuse or ridicule, including profanity, innuendoes, stories, and jokes that are sexual in nature and/or gender-related. This might include inappropriate sex-oriented comments on appearance, including dress or physical features.
- e) Asking or commenting about an individual's sexual activities.
- f) Hostile actions taken against an individual because of that individual's sex, sexual orientation, gender identity, and the status of being transgender.
- g) Displaying or distributing pornographic or other sexually explicit materials (print or digital) such as magazines, pictures, cartoons, etc.
- h) Unwelcome staring, leering, or gesturing which is sexually suggestive in nature.
- i) Unwelcome and/or offensive public displays of sexual or physical affection.
- j) Clothing that reflects sexually obscene and/or sexually explicit messages, slogans, or pictures.
- k) Any other unwelcome and unwanted sexually oriented and/or gender-based behavior which is sexually demeaning, belittling, intimidating, or perpetrates sexual stereotypes and attitudes.

SUBJECT: SEXUAL HARASSMENT OF STUDENTS (Cont'd.)

Reporting Allegations of Sexual Harassment

In order for the District to enforce this policy, and to take corrective action as warranted, it is essential that students who believe that they have been a victim of sexual harassment in the school environment, as well as any other person who has knowledge of or witnesses any possible sexual harassment, immediately report the alleged conduct or incident. Reports of sexual harassment may be made orally or in writing to any District employee including, but not limited to, a teacher, building principal, CRCO, Title IX Coordinator, or DAC.

All District employees who witness or receive an oral or written report of sexual harassment must immediately inform the CRCO. Failure to immediately inform the CRCO may subject the employee to discipline up to and including termination. If the CRCO is unavailable, including due to a conflict of interest or other disqualifying reason, the report will be directed to another CRCO, if the District has designated another individual to serve in that capacity. If the District has not designated another CRCO, the Superintendent will ensure that another person with the appropriate training and qualifications is appointed to act as the CRCO.

Additionally, District employees must comply with reporting requirements in any other applicable District policy or document. Applicable policies or documents may include: Policy #3420 -- Non-Discrimination and Anti-Harassment in the District; Policy #3421 -- Title IX and Sex Discrimination; Policy #7550 -- Dignity for All Students; and the District's Code of Conduct.

Grievance Process for Complaints of Sexual Harassment

The District will act to promptly, thoroughly, and equitably investigate all complaints, whether oral or written, of sexual harassment of students and will promptly take appropriate action to protect students from further sexual harassment.

Various District policies and documents address sexual harassment of students. These policies and documents may include: Policy #3420 -- Non-Discrimination and Anti-Harassment in the District; Policy #3421 -- Title IX and Sex Discrimination; Policy #7550 -- Dignity for All Students; and the District's Code of Conduct. All complaints will be handled in accordance with the applicable District policies and/or documents.

The determination as to which District policies and/or documents are applicable is fact specific, and the CRCO may work with other District staff such as the District's Title IX Coordinator(s) and/or DAC(s) to determine which District policies and/or documents are applicable to the specific facts of the complaint.

If an investigation reveals that sexual harassment has occurred, the District will take immediate corrective action as warranted. This action will be taken in accordance with applicable law and regulation, as well as any applicable District policy, regulation, procedure, collective bargaining agreement, third-party contract, or other document such as the District's *Code of Conduct*.

SUBJECT: SEXUAL HARASSMENT OF STUDENTS (Cont'd.)

Prohibition of Retaliatory Behavior (Commonly Known as "Whistle-Blower" Protection)

The District prohibits retaliation against any individual because the individual made a report or complaint, testified, assisted, or participated or refused to participate in an investigation, proceeding, or hearing related to a complaint of sexual harassment.

Complaints of retaliation may be directed to the CRCO. If the CRCO is unavailable, including due to a conflict of interest or other disqualifying reason, the report will be directed to another CRCO, if the District has designated another individual to serve in that capacity. If the District has not designated another CRCO, the Superintendent will ensure that another person with the appropriate training and qualifications is appointed to act as the CRCO.

Where appropriate, follow-up inquiries will be made to ensure that the sexual harassment has not resumed and that those involved in the investigation have not suffered retaliation.

Equal Educational Opportunities Act of 1974, 20 USC § 1701 et seq. Title IV of the Civil Rights Act of 1964, 42 USC § 2000c et seq. Title IX of the Education Amendments Act of 1972, 20 USC § 1681 et seq. 34 CFR Parts 106 and 270 45 CFR Part 86 Civil Rights Law § 40-c Education Law §§ 10-18, 313, 2801, and 3201-a New York State Human Rights Law, Executive Law § 290 et seq. 8 NYCRR § 100.2 9 NYCRR § 466 et seq.

NOTE: Refer also to Policies #3410 -- Code of Conduct

#3420--Non-Discrimination and Anti-Harassment in the District

#6122-Complaints and Grievances by Employees

#7550--<u>Dignity for All Students</u> #7553--<u>Hazing of Students</u> District *Code of Conduct* The Board of Education affirms its commitment to non-discrimination and recognizes its responsibility to provide for all District students an environment that is free of sexual harassment and intimidation. Sexual harassment is a violation of law and stands in direct opposition to District policy. Therefore, the Board prohibits and condemns all forms of sexual harassment by employees, school volunteers, students, and non-employees such as contractors and vendors which occur on school grounds and at all school-sponsored events, programs and activities including those that take place at locations off school premises or those that take place in another state. Generally, sexual harassment is defined as unwelcome sexual advances, requests for sexual favors and other verbal or physical conduct or communication of a sexual nature when:

- Submission to or rejection of such sexually harassing conduct and/or communication by a student affects decisions regarding any aspect of the student's education, including participation in school-sponsored activities;
- b) Conditions exist within the school environment that allow or foster obscene pictures, lewd jokes, sexual advances, requests for sexual favors or other harassing activities of a sexual nature; and
- e) Such conduct and/or communication has the purpose or effect of substantially or unreasonably interfering with a student's academic performance or participation in an educational or extracurricular activity, or creating an intimidating, hostile or offensive learning environment; and/or effectively bars the student's access to an educational opportunity or benefit.

The Board acknowledges that in determining whether sexual harassment has occurred the totality of the circumstances, expectations, and relationships should be evaluated including, but not limited to, the ages of the harasser and the victim; the number of individuals involved; and the type, frequency and duration of the conduct. The Board recognizes that sexual harassment can originate from a person of either sex against a person of the opposite or same sex, and from a third party such as a school visitor, volunteer, or vendor, or any other individual associated with the School District. Sexual harassment may occur from student-to-student, from staff-to-student, from student-to-staff, as well as staff-to-staff. The District will designate, at a minimum, two (2) Complaint Officers, one (1) of each gender.

In order for the Board to enforce this policy, and to take corrective measures as may be necessary, it is essential that any student who believes he/she has been a victim of sexual harassment in the school environment, as well as any other person who is aware of and/or who has knowledge of or witnesses any possible occurrence of sexual harassment, immediately report such alleged harassment; such report shall be directed to or forwarded to the District's designated Complaint Officers through informal and/or formal complaint procedures as developed by the District. Such complaints are recommended to be in writing, although verbal complaints of alleged sexual harassment will also be promptly investigated in accordance with the terms of this policy. In the event

SUBJECT: SEXUAL HARASSMENT OF STUDENTS (Cont'd.)

that the Complaint Officer is the alleged offender, the report will be directed to the next level of supervisory authority.

Upon receipt of an informal/formal complaint (even an anonymous complaint), the District will conduct a thorough investigation of the charges. However, even in the absence of a complaint, if the District has knowledge of or has reason to know of or suspect any occurrence of sexual harassment, the District will investigate such conduct promptly and thoroughly. To the extent possible, within legal constraints, all complaints will be treated as confidentially and privately as possible. However, disclosure may be necessary to complete a thorough investigation of the charges, and any disclosure will be provided on a "need to know" basis.

Based upon the results of the investigation, if the District determines that an employee and/or student has violated the terms of this policy and/or accompanying regulations, immediate corrective action will be taken as warranted. Should the offending individual be a student, appropriate disciplinary measures will be applied, up to and including suspension, in accordance with District policy and regulation, the Code of Conduct, and applicable laws and/or regulations. Should the offending individual be a school employee, appropriate disciplinary measures will be applied, up to and including termination of the offender's employment, in accordance with legal guidelines, District policy and regulation, the Code of Conduct and the applicable collective bargaining agreement(s). Third parties (such as school volunteers, vendors, etc.) who are found to have violated this policy and/or accompanying regulations will be subject to appropriate sanctions as warranted and in compliance with law.

Prohibition of Retaliatory Behavior

The Board prohibits any retaliatory behavior directed against complainants, victims, witnesses, and/or any other individuals who participated in the investigation of a complaint of sexual harassment. Follow-up inquiries shall be made to ensure that harassment has not resumed and that all those involved in the investigation of the sexual harassment complaint have not suffered retaliation.

Finding That Harassment Did Not Occur

At any level/stage of investigation of alleged harassment, if a determination is made that harassment did not occur, the Complaint Officer will so notify the complainant, the alleged offender and the Superintendent of this determination. Such a finding does not preclude the complainant from filing an appeal pursuant to District policy or regulation and/or pursuing other legal avenues of recourse.

However, even if a determination is made that harassment did not occur, the Superintendent/designee reserves the right to initiate staff awareness and training, as applicable, to help ensure that the school community is not conducive to fostering harassment in the workplace.

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SUBJECT: SEXUAL HARASSMENT OF STUDENTS (Cont'd.)

In all cases, the Superintendent will inform the Board of Education of the results of each investigation involving a finding that harassment did not occur-

Knowingly Makes False Accusations

Employees and/or students who knowingly make false accusations against another individual as to allegations of harassment may also face appropriate disciplinary action.

Privacy Rights

As part of the investigation, the District has the right to search all school property and equipment including District computers. Rooms, desks, cabinets, lockers, computers, etc. are provided by the District for the use of staff and students, but the users do not have exclusive use of these locations or equipment and should not expect that materials stored therein will be private.

Development and Dissemination of Administrative Regulations

Regulations will be developed for reporting, investigating and remedying allegations of sexual harassment. An appeal procedure will also be provided to address any unresolved complaints and/or unsatisfactory prior determinations by the applicable complaint officer(s).

Such regulations will be developed in accordance with federal and state law as well as any applicable collective bargaining agreement(s).

The Superintendent/designee(s) will affirmatively discuss the topic of sexual harassment with all employees and students, express the District's condemnation of such conduct, and explain the sanctions for such harassment. Appropriate training and/or "awareness" programs will be established for staff and students to help ensure knowledge of and familiarity with the issues pertaining to sexual harassment in the schools, and to disseminate preventative measures to help reduce such incidents of prohibited conduct. Furthermore, special training will be provided for designated supervisors and managerial employees, as may be necessary, for training in the investigation of sexual harassment complaints.

A copy of this policy and its accompanying regulations will be available upon request and may be posted at various locations in each school building. The District's policy and regulations on sexual harassment will be published in appropriate school publications such as teacher/employee handbooks, student handbooks, and/or school calendars.

Civil Rights Act of 1991, 42 United States Code (USC) Section 1981(a) Title VII of the Civil Rights Act of 1964, 42 United States Code (USC) Section 2000e et seq. Title IX of the Education Amendments of 1972, 20 United States Code (USC) Section 1681 et seq. 34 Code of Federal Regulations (CFR) Section 100 et seq. 29 Code of Federal Regulations (CFR) Section 1604.11(a)

Education Law Section 2801(1)

Executive Law Sections 296 and 297

SUBJECT: DIGNITY FOR ALL STUDENTS ACT

Overview

The Board of Education recognizes that learning environments that are safe and supportive can increase student attendance and improve academic achievement. A student's ability to learn and achieve high academic standards, and a school's ability to educate students, is compromised by incidents of discrimination or harassment, including but not limited to bullying, taunting and intimidation. Therefore, in accordance with the Dignity for All Students Act, Education Law, Article 2, the District will strive to create an environment free of discrimination and harassment and will foster civility in the schools to prevent and prohibit conduct which is inconsistent with the District's educational mission.

The District condemns and prohibits all forms of discrimination and harassment of students based on actual or perceived race, color, weight, national origin, ethnic group, religion, religious practice, disability, sexual orientation, gender, or sex by employees or students on school property and at school-sponsored activities and events.

In addition, other acts of harassment, bullying, and/or discrimination that occur off school property may be subject to discipline or other corrective action, where such acts create or would foreseeably create a risk of substantial disruption within the school environment, where it is foreseeable that the conduct, threats, intimidation, or abuse might reach school property.

The District seeks to create an environment free of harassment, bullying, and discrimination; to foster civility in its schools; and to prevent conduct that is inconsistent with its educational mission. This policy is just one component of the District's overall commitment to maintaining a discrimination and harassment-free educational and work environment.

The District, therefore, prohibits all forms of harassment and bullying of students by employees or other students on school property and at school functions. The District further prohibits discrimination against students, including, but not limited to, discriminatory acts based on a person's actual or perceived race, color, weight, national origin, ethnic group, religion, religious practice, disability, sexual orientation, gender, or sex by employees or other students on school property and at school functions.

In addition, other acts of harassment, bullying, and/or discrimination that occur off school property may be subject to discipline or other corrective action, where such acts create or would foreseeably create a risk of substantial disruption within the school environment, where it is foreseeable that the conduct, threats, intimidation, or abuse might reach school property.

The District adopts this policy as part of its effort to provide for the prompt and equitable resolution of complaints of harassment, bullying, and/or discrimination of students. The District will promptly respond to reports of harassment, bullying, and/or discrimination of students, ensure that all investigations are conducted within a reasonably prompt time frame and under a predictable fair grievance process that provides due process protections, and impose disciplinary measures and implement remedies when warranted.

Inquiries about this policy may be directed to the District's Dignity Act Coordinator(s) (DAC(s)).

SUBJECT: DIGNITY FOR ALL STUDENTS ACT (Cont'd.)

Dignity Act Coordinator

At least one (1) employee at every school shall be designated as the Dignity Act Coordinator(DAC). The Dignity Act Coordinator(s) will and receives reports of harassment, bullying, and/or discrimination. Each DAC.will be:

- a) Approved by the Board;
- b) Licensed and/or certified by the Commissioner as a classroom teacher, school counselor, school psychologist, school nurse, school social worker, school administrator or supervisor, or Superintendent;
- c) Instructed in the provisions of the Dignity for All Students Act and its implementing regulations;
- d) Thoroughly trained to handle human relations in the areas of race, color, weight, national origin, ethnic group, religious practice, disability, sexual orientation, gender and sex;
- e) Provided with training which addresses: the social patterns of harassment, bullying, and discrimination, including, but not limited to, those acts based on a person's actual or perceived race, color, weight, national origin, ethnic group, religion, religious practice, disability, sexual orientation, gender, and sex;
- f) Provided with training in the identification and mitigation of harassment, bullying, and discrimination; and
- g) Provided with training in strategies for effectively addressing problems of exclusion, bias, and aggression in educational settings.

The District will widely disseminate the name, designated school, and contact information of each DAC to all school personnel, students, and parents or persons in parental relation by:

- a) Listing it in the *Code of Conduct*, with updates posted on the District's website; and
- b) Including it in the *Code of Conduct's* plain language summary provided to all parents or persons in parental relation to students before the beginning of each school year; and
- c) Providing it to parents or persons in parental relation in at least one District or school mailing or other method of distribution each school year, including, but not limited to, electronic communication and/or sending information home with each student. If the information changes, parents and persons in parental relation will be notified in at least one subsequent District or school mailing, or other method of distribution as soon as practicable thereafter;
- d) Posting it in highly visible areas of school buildings; and
- e) Making it available at the District and school-level administrative offices.

SUBJECT: DIGNITY FOR ALL STUDENTS ACT (Cont'd.)

If a Dignity Act CoordinatorDAC vacates his/her position, the District will immediately designate another eligible employee as an interim DAC, pending approval of a successor DAC from the Board of Education, within thirty (30) days of the date the position was vacated. In the event a DAC is unable to perform the duties of the position for an extended period of time, the District will immediately designate another eligible employee as an interim DAC, pending the return of the previous individual to the position.

Training and Awareness

Each year, all employees will be provided with training to promote a supportive school environment that is free from harassment, bullying, and/or discrimination, and to discourage and respond to incidents of harassment, bullying, and/or discrimination. This training may be provided in conjunction with existing professional developmentlearning, and will be conducted consistent with guidelines approved by the Board, and will include training to:

- a) Raise awareness and sensitivity to potential acts of harassment, bullying, and discrimination;
- b) Address social patterns of harassment, bullying, and discrimination;
- c) Inform employees on the identification and mitigation of harassment, bullying, and discrimination;
- d) Enable employees to prevent and respond to incidents of harassment, bullying, and/or discrimination;
- e) Make school employees aware of the effects of harassment, bullying, cyberbullying, and/or discrimination on students;
- f) Provide strategies for effectively addressing problems of exclusion, bias, and aggression;
- g) Include safe and supportive school climate concepts in curriculum and classroom management; and
- h) Ensure the effective implementation of school policy on conduct and discipline.

Rules against harassment, bullying, and discrimination will be included in the *Code of Conduct*, publicized District-wide, and disseminated to all staff and parents or persons in parental relation. Any amendments to the *Code of Conduct* will be disseminated as soon as practicable following their adoption. The District will provide new employees with a complete copy of the current *Code of Conduct* upon beginning their employment, and distribute an age-appropriate summary to all students at a school assembly at the beginning of each school year.

Internal Reports and Investigations of Discrimination and Harassment

All District employees who witness or receive an oral or written report of harassment, bullying, and/or discrimination are required to take action. District employees must make an oral report promptly to the Superintendent or principal, their designee, or the Dignity Act Coordinator (DAC) not later than one school day after witnessing or receiving an oral or written report of harassment, bullying, and/or discrimination. No later than two school days after making the oral report, the District employee must file a written report with the Superintendent or principal, their designee, or the DAC.

SUBJECT: DIGNITY FOR ALL STUDENTS ACT (Cont'd.)

The Superintendent or principal, their designee, or the DAC will lead or supervise the thorough investigation of all reports of harassment, bullying, and/or discrimination and ensure that all investigations are promptly completed after the receipt of a written report. In investigating any allegation, the investigator may seek the assistance of the District's Civil Rights Compliance Officer(s) (CRCO(s)) and/or Title IX Coordinator(s) in investigating, responding to, and remedying complaints of harassment, bullying, and/or discrimination.

Additionally, other District policies and documents address harassment, bullying, and discrimination of students. These policies and documents may include: Policy #3420 -- Non-Discrimination and Anti-Harassment in the District; Policy #3421 -- Title IX and Sex Discrimination; Policy #7551 -- Sexual Harassment of Students; and the District's Code of Conduct. All complaints will be handled in accordance with the applicable District policies and/or documents.

The determination as to which District policies and/or documents are applicable is fact specific, and the DAC may work with other District staff such as the District's CRCO(s) and/or Title IX Coordinator(s) to determine which District policies and/or documents are applicable to the specific facts of the complaint.

When an investigation verifies a material incident of harassment, bullying, and/or discrimination, the Superintendent or principal, their designee, or the DAC will take prompt action, consistent with applicable laws and regulations as well as the District's *Code of Conduct*, reasonably calculated to end the harassment, bullying, and/or discrimination, eliminate any hostile environment, create a more positive school culture and climate, prevent recurrence of the behavior, and ensure the safety of the student or students against whom the behavior was directed.

The Superintendent or principal, their designee, or the DAC will promptly notify the appropriate local law enforcement agency when it is believed that any harassment, bullying, and/or discrimination constitutes criminal conduct.

Reporting Incidents to the Superintendent

At least once during each school year, each building principal will provide a report on data and trends related to harassment, bullying, and/or discrimination to the Superintendent in a manner prescribed by the District. This report will be used to submit the annual School Safety and the Educational Climate (SSEC) Summary Data Collection form to the State Education Department (SED).

Reporting of Material Incidents to the Commissioner of Education

Each school year, the District will submit to the Commissioner a report of material incidents of harassment, bullying, and/or discrimination that occurred during the school year in accordance with law and regulation. This report will be submitted in a manner prescribed by the Commissioner, on or before the basic educational data system (BEDS) reporting deadline or other date determined by the Commissioner.

Prohibition of Retaliatory Behavior (Commonly Known as "Whistle-Blower" Protection)

Any person who has reasonable cause to suspect that a student has been subjected to harassment, bullying, and/or discrimination by an employee or student, on school grounds or at a school function, who acts reasonably and in good faith and reports such information to school officials, the Commissioner, or law enforcement authorities, shall have immunity from any civil liability that may

SUBJECT: DIGNITY FOR ALL STUDENTS ACT (Cont'd.)

arise from making such report. The Board prohibits any retaliatory behavior directed at complainants, victims, witnesses and/or any other individuals who participated in the investigation of a complaint of discrimination or harassment.

Publication of District Policy

At least once during each school year, all employees, students, and parents or persons in parental relation will be provided with a written or electronic copy of this policy, or a plain-language summary of it. The policy or summary will include information relating to how students, parents or persons in parental relation, and may report harassment, bullying, and/or discrimination. Additionally, the District will maintain a current version of this policy on its website at all times.

Application

8 NYCRR § 100.2

Nothing in this policy or its implementing regulations should be interpreted to preclude or limit any right or cause of action provided under any local, state, or federal ordinance, law or regulation including, but not limited to, any remedies or rights available under the Individuals with Disabilities Education Act, Title VII of the Civil Rights Law of 1964, Section 504 of the Rehabilitation Act of 1973, or the Americans with Disabilities Act of 1990.

100.2(1)(2) Education Law §§ 10-18 and 2801

Refer also to Policies #1330 -- Appointments and Designations by the Board **NOTE:**

#3410 -- Code of Conduct

#3420 -- Non-Discrimination and Anti-Harassment in the District

#3421 -- Title IX and Sex Discrimination

#5670 -- Records Management

#3129 -- Acceptable Use Policy - Staff/Students/Visitors To The District For District Network, 1:1 Chromebooks,

Computers, E-Mail, And The Internet

#7551 -- Sexual Harassment of Students

#7552 -- Student Gender Identity

#7553 -- Hazing of Students

#8120 -- Equal Educational Opportunities

#8242 -- Civility, Citizenship, and Character

Education/Interpersonal

Violence Prevention Education

District Code of Conduct

Instruction

SUBJECT: EQUAL EDUCATIONAL OPPORTUNITIES

Overview

The District is committed to creating and maintaining an environment which is free from discrimination and harassment. This policy addresses the provision of equal educational opportunities to students. It is just one component of the District's overall commitment to maintaining a discrimination and harassment-free educational and work environment.

Consistent with this commitment and in accordance with law and regulation, the District provides equal opportunity for students and does not discriminate against any student enrolled in (or any candidate for admission to) its programs and activities on the basis of any legally protected class or category including, but not limited to: race; color; religion; disability; national origin; sexual orientation; gender identity or expression; military status; sex; age; marital status; pregnancy; parental status; weight; ethnic group; or religious practice. Further, the District provides equal access to its facilities to any group officially affiliated with the Boy Scouts of America or any other youth group listed in Title 36 (as a patriotic society).

The District adopts this policy as part of its effort to provide for the prompt and equitable resolution of complaints of discrimination. The District will promptly respond to reports of discrimination, ensure that all investigations are conducted within a reasonably prompt time frame and under a predictable fair grievance process that provides due process protections, and impose disciplinary measures and implement remedies when warranted.

Inquiries about this policy may be directed to the District's Civil Rights Compliance Officer(s) (CRCO(s)).

Educational Services for Married/Pregnant Students

The opportunity to participate in all of the programs and activities of the District will not be restricted or denied because of pregnancy, parenthood, or marriage. Pregnant students will be encouraged to remain and participate in District programs. The forms of instruction provided to these students may include any or all of the following:

- a) Remain in school with provisions for special instruction, scheduling, and counseling as needed;
- b) Receive home instruction;
- c) Attend BOCES programs.

The Superintendent or designee, in consultation with student services staff, the school physician, and the student's personal physician, may make program modifications which are feasible and necessary to accommodate the special needs of these students.

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Instruction

SUBJECT: EQUAL EDUCATIONAL OPPORTUNITIES (Cont'd.)

Reporting Allegations of Discrimination

In order for the District to enforce this policy, and to take corrective action as warranted, it is essential that students who believe that they have been a victim of discrimination, as well as any other person who has knowledge of or witnesses any possible discrimination, immediately report the alleged conduct or incident. Reports of discrimination may be made orally or in writing to any District employee including, but not limited to, a teacher, building principal, or CRCO.

All District employees who witness or receive an oral or written report of discrimination must immediately inform the CRCO. Failure to immediately inform the CRCO may subject the employee to discipline up to and including termination. If the CRCO is unavailable, including due to a conflict of interest or other disqualifying reason, the report will be directed to another CRCO, if the District has designated another individual to serve in that capacity. If the District has not designated another CRCO, the Superintendent will ensure that another person with the appropriate training and qualifications is appointed to act as the CRCO.

Additionally, District employees must comply with reporting requirements in any other applicable District policy or document. Applicable policies or documents may include: Policy #3420 -- Non-Discrimination and Anti-Harassment in the District; Policy #3421 -- Title IX and Sex Discrimination; Policy #7550 -- Dignity for All Students; and the District's Code of Conduct.

Grievance Process for Complaints of Discrimination

The District will act to promptly, thoroughly, and equitably investigate all complaints, whether oral or written, of discrimination and will promptly take appropriate action to protect students from further discrimination.

Various District policies and documents address discrimination. These policies and documents may include: Policy #3420 -- Non-Discrimination and Anti-Harassment in the District; Policy #3421 -- Title IX and Sex Discrimination; Policy #7550 -- Dignity for All Students; and the District's Code of Conduct. All complaints will be handled in accordance with the applicable District policies and/or documents.

The determination as to which District policies and/or documents are applicable is fact specific, and the CRCO may work with other District staff such as the District's Title IX Coordinator(s) and/or Dignity Act Coordinator(s) (DAC(s)) to determine which District policies and/or documents are applicable to the specific facts of the complaint.

If an investigation reveals that discrimination has occurred, the District will take immediate corrective action as warranted. This action will be taken in accordance with applicable law

Instruction

SUBJECT: EQUAL EDUCATIONAL OPPORTUNITIES (Cont'd.)

and regulation, as well as any applicable District policy, regulation, procedure, collective bargaining agreement, third-party contract, or other document such as the District's *Code of Conduct*.

Prohibition of Retaliatory Behavior (Commonly Known as "Whistle-Blower" Protection)

The District prohibits retaliation against any individual because the individual made a report or complaint, testified, assisted, or participated or refused to participate in an investigation, proceeding, or hearing related to a complaint of discrimination.

Complaints of retaliation may be directed to the CRCO. If the CRCO is unavailable, including due to a conflict of interest or other disqualifying reason, the report will be directed to another CRCO, if the District has designated another individual to serve in that capacity. If the District has not designated another CRCO, the Superintendent will ensure that another person with the appropriate training and qualifications is appointed to act as the CRCO.

Where appropriate, follow-up inquiries will be made to ensure that the discrimination has not resumed and that those involved in the investigation have not suffered retaliation.

Age Discrimination Act of 1975, 42 USC § 6101 et seq.
Americans with Disabilities Act (ADA), 42 USC § 12101 et seq.
Equal Educational Opportunities Act of 1974, 20 USC § 1701 et seq.
Section 504 of the Rehabilitation Act of 1973, 29 USC § 790 et seq.
Title IV of the Civil Rights Act of 1964, 42 USC § 2000c et seq.
Title VI of the Civil Rights Act of 1964, 42 USC § 2000d et seq.
Title IX of the Education Amendments Act of 1972, 20 USC § 1681 et seq.
28 CFR Part 35
34 CFR Parts 100, 104, 106, 110, and 270
45 CFR Part 86
Civil Rights Law §§ 40, 40-c, and 47-b
Education Law §§ 10-18, 313, 2801, 3201, and 3201-a
New York State Human Rights Law, Executive Law § 290 et seq.
8 NYCRR § 100.2
9 NYCRR § 466 et seq.

NOTE: Refer also to Policies #3410 -- Code of Conduct

#3420 -- Non-Discrimination and Anti-Harassment in the District

#3421 -- Title IX and Sex Discrimination

#7554 -- Dignity for All Students

#7551 -- Sexual Harassment of Students

District Code of Conduct

SUBJECT: FOUAL EDUCATIONAL OPPORTUNITIES

It is the policy of this District that each student attending its public schools shall have equal educational opportunities and will not be excluded or prevented from participating in or having events on the basis of race, color, creed, religion, national origin, political affiliation, sex, sexual orientation, age, marital status, military status, disability, or use of a guide dog, hearing dog or service dog. Sexual orientation is defined as heterosexuality, homosexuality, bisexuality, or asexuality, whether actual or perceived.

Administration shall establish grievance procedures that provide for the prompt and equitable resolution of complaints pertaining to discrimination on the basis of race, color, creed, religion, national origin, political affiliation, sex, sexual orientation, age, marital status, military disability, or use of a guide dog, hearing dog or service dog.

Prohibition of Retaliatory Behavior

The Board prohibits any retaliatory behavior directed against complainants, victims, witnesses, and/or any other individuals who participated in the investigation of a complaint of discrimination. Follow-up inquiries shall be made to ensure that discrimination has not resumed and that all those involved in the investigation of the discrimination complaint have not suffered retaliation.

Age Discrimination in Employment Act, 29 United States Code Section 621

Americans With Disabilities Act, 42 United States Code (USC) Section 12101 et seq. Prohibits discrimination on the basis of disability.

Section 504 of the Rehabilitation Act of 1973, 29 United States Code (USC) Section 794 et seq.

Title VI of the Civil Rights Act of 1964, 42 United States Code (USC) Section 2000d et seq.

Title VII of the Civil Rights Act of 1964, 42 United States Code (USC) Section 2000e et sea.

Prohibits discrimination on the basis of race, color, religion, sex or national origin.

Title IX of the Education Amendments of 1972, 20 United States Code (USC) Section 1681 et seq.

-Prohibits discrimination on the basis of sex.

Civil Rights Law Section 40-c

Prohibits discrimination on the basis of race, ereed, color, national origin, sex, marital status, sexual orientation or disability.

Executive Law Section 290 et seq.

Prohibits discrimination on the basis of age, race, creed, color, national origin, sex, sexual orientation,

disability, military status, marital status, or use of a recognized guide dog, hearing dog or service dog.

TAX ANTICIPATION NOTE RESOLUTION OF ROCKY POINT UNION FREE SCHOOL DISTRICT, NEW YORK, ADOPTED APRIL 20, 2021, AUTHORIZING THE ISSUANCE OF NOT TO EXCEED \$10,000,000 TAX ANTICIPATION NOTES IN ANTICIPATION OF THE RECEIPT OF TAXES TO BE LEVIED FOR THE FISCAL YEAR ENDING JUNE 30, 2022

RESOLVED BY THE BOARD OF EDUCATION OF ROCKY POINT UNION FREE SCHOOL DISTRICT, IN THE COUNTY OF SUFFOLK, NEW YORK, AS FOLLOWS:

Section 1. Tax Anticipation Notes (herein called "Notes") of Rocky Point Union Free School District, in the County of Suffolk, New York (herein called "District"), in the principal amount of not to exceed \$10,000,000, and any notes in renewal thereof, are hereby authorized to be issued pursuant to the provisions of Sections 24.00 and 39.00 of the Local Finance Law, constituting Chapter 33-a of the Consolidated Laws of the State of New York (herein called "Law").

Section 2. The following additional matters are hereby determined and declared:

- (a) The Notes shall be issued in anticipation of the collection of real estate taxes to be levied for school purposes for the fiscal year commencing July 1, 2021 and ending June 30, 2022, and the proceeds of the Notes shall be used only for the purposes for which said taxes are levied.
- (b) The Notes shall mature within the period of one year from the date of their issuance.
 - (c) The Notes are not issued in renewal of other notes.
- (d) The total amount of such taxes remains uncollected at the date of adoption of this resolution.
- Section 3. The Notes hereby authorized shall contain the recital of validity prescribed by Section 52.00 of the Law and shall be general obligations of the District, and the faith and credit of the District are hereby pledged to the punctual payment of the principal of and interest on the Notes and unless the Notes are otherwise paid or payment provided for, an amount sufficient for such payment shall be inserted in the budget of the District and a tax sufficient to provide for the payment thereof shall be levied and collected.
- Section 4. Subject to the provisions of this resolution and the Law, and pursuant to Sections 50.00, 56.00, 60.00 and 61.00 of the Law, the power to sell and issue the Notes authorized pursuant hereto, or any renewals thereof, and to determine the terms, form and contents, including the manner of execution, of such Notes, and to execute tax certifications relative thereto, is hereby delegated to the President of the Board of Education, the chief fiscal officer of the District.
- Section 5. The Notes shall be executed in the name of the District by the manual signature of the President of the Board of Education, the Vice President of the Board of

Education, the District Treasurer, the District Clerk, or such other officer of the District as shall be designated by the chief fiscal officer of the District, and shall have the corporate seal of the District impressed or imprinted thereon which corporate seal may be attested by the manual signature of the District Clerk.

Section 6. This resolution shall take effect immediately.

The adoption of the foregoing resolution was seconded by Board Member and duly put to a vote on roll call, which resulted as follows:

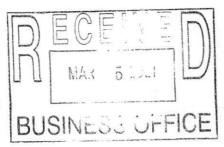
AYES:

NOES:

The resolution was declared adopted.



Mr. Christopher Van Cott School Business Official Rocky Point Union Free School District 90 Rocky Point-Yaphank Road Rocky Point NY 11778



February 26, 2021

RE: Affordable Care Act Administration 2021-2022 School Year

Dear Mr. Christopher Van Cott,

Thank you for the opportunity to serve Rocky Point Union Free School District in providing Affordable Care Act Administration and Consulting through June 30th 2021.

The upcoming 2021-2022 school year will include all the same IRS reporting requirements as the 2020-2021 school year. The District is responsible to provide every "Full-time" employee, and every "Part-Time" employee who is enrolled self-funded health plan an IRS form 1095 by January 31st, 2022 for calendar year 2021. In addition, the District will also be required to provide the IRS with IRS form 1094C and copies of all 1095C forms electronically through the IRS Affordable Care Act Information Returns (AIR) Program.

Seneca Consulting Group would be happy to continue to provide ACA tracking and administration for Rocky Point Union Free School District. If needed, we would also prepare all 1094 & 1095 IRS forms, and file them electronically through the AIR Program on behalf of Rocky Point Union Free School District. Our fees for the 2021-2022 school year are attached and have remained unchanged. If you wish to continue, please sign the attached agreement, and return one copy to my attention. If you require any changes to the agreement, please let me know and we would be happy to provide a word version of the agreement for redline.

Sincerely,

Daniel C. Opinante

and Opment

President

(631) 240-4477

960 Wheeler Road #5367 Hauppauge, NY 11788

Executive Summary:

District	Rocky Point Union Free School District
Contract Term	2021-2022 Fiscal Year 7/1/2021-6/30/2022
Contract Type	EASTERN SUFFOLK BOCES FULL
	RESPONSIBILITY 500- 1000
*	EMPLOYEES
Payroll System	nVision
§6056 Reporting (Employer Mandate)	\$10,500.00
§6055 Reporting (Self-Funding Reporting)	INCLUDED
Total Fee 7/1/2020-6/30/2021	\$10,500.00
1095 Form Printing and Mailing fee (Optional)	\$1.30 Per Form
Health Plan	NYSHIP
Full-Time / Part-Time Determination	Measurement Period Safe Harbor

Measurement Period Safe Harbor Assumptions

WHEREAS, Section 4980H-3 of the final regulations (26 C.F.R. § 4980H-3) defines the following employee definitions:

Ongoing Employee: An "ongoing employee" is generally an employee who has been employed by the district for at least one complete standard measurement period. As stated in Notice 2011-36

New Employee: A "New Employee" is generally an employee who has NOT been employed by the district for at least one complete standard measurement period.

Variable Hour Employee: A "variable hour employee" if, based on the facts and circumstances at the start date, it cannot be determined that the employee is reasonably expected to work on average at least 30 hours per week. A new employee who is expected to work initially at least 30 hours per week may be a variable hour employee if, based on the facts and circumstances at the start date, the period of employment at more than 30 hours per week is reasonably expected to be of limited duration and it cannot be determined that the employee is reasonably expected to work on average at least 30 hours per week over the initial measurement period.

Employee Type	Measurement Period	Administrative Period	Stability Period
All new, variable- hour employees	Initial Measurement Period: Twelve (12) calendar months, which shall begin on the first day of the first month following the employee's start date.	One (1) month period beginning immediately at the end of the initial measurement period and which shall continue through the end of the first full calendar month beginning on or after the end of the initial measurement period.	Twelve (12) calendar months, to begin immediately after the administrative period
All ongoing employees	Standard Measurement Period: Twelve (12) Months, measured from November 1 through October 31	Two (2) months period from November 1 through December 31	Twelve (12) calendar months beginning immediately after the administrative period on January 1 and continuing until December 31

Data Requirements: nVision / Finance Manager

AFTER CHECKS PRINTED - PAYROLL EARNINGS REGISTER

- CODE
- DESCRIPTION
- EMPLOYEE NUMBER
- RATE UNITS
- CHECK DATE
- AMOUNT
- LIMIT
- FTD AMOUNT
- YTD AMOUNT
- REMAINING
- RET SYS

COMPLETE EMPLOYEE PERSONNEL FILE REPORT (ALL EMPLOYEES, ACTIVE, IN-ACTIVE, TERMINATED, RETIRES, ECT)

- EMPLOYEE NUMBER
- SOCIAL SECURITY NUMBER
- LAST NAME
- FIRST NAME
- ORIGIONAL HIRE DATE
- REHIRE DATE
- TERMINATION DATE
- ADDRESS
- CITY
- STATE
- ZIP
- EMPLOYEE GROUP (NVISION)
- PRIMARY EMPLOYEE POSITION (NVISION)
- PRIMARY EMPLOYEE TYPE (FINANCE MANAGER)

CONTRACT AND RATE REPORT (FISCAL YEAR)

- EMPLOYEE NUMBER
- EMPLOYEE NAME
- EMPLOYEE TYPE
- LEVEL
- STEP
- METHOD
- CHECKS
- BASE CONTRACT
- FTE%
- FTE AMOUNT
- ENTITLE
- PER-PAY
- DAILY
- HOURLY
- START DATE
- END DATE

AFFORDABLE CARE ACT ADMINISTRATION AGREEMENT

AGREEMENT (the "Agreement") made as of this ____ day of ______, 2021 by Seneca Consulting Group, Inc., a New York corporation having an office located at 960 Wheeler Road #5367 Hauppauge NY 11788 (hereinafter referred to as "ADMINISTRATOR") and Rocky Point Union Free School District, having its administrative offices at 90 Rocky Point-Yaphank Road Rocky Point NY 11778, (hereinafter referred to as "DISTRICT").

WHEREAS, ADMINISTRATOR, an employee benefits Administrator, provides professional fee-based benefits consulting and administrative services and;

WHEREAS, DISTRICT desires to retain ADMINISTRATOR to provide consulting and Affordable Care Act administration and ADMINISTRATOR is capable and willing to provide the services to DISTRICT.

NOW, THEREFORE, in consideration of the mutual covenants and undertakings herein agreed, and for other good and valuable consideration, the parties agree as follows:

(1) Appointment as ADMINISTRATOR. DISTRICT hereby engages and appoints ADMINISTRATOR to provide employee benefit consulting services and to act as DISTRICT's authorized agent (an authorized agent is a person or firm that, with the payor's authorization, transmits specific information and/or Affordable Care Act ("ACA") return documents to the Internal Revenue Service ("IRS") on behalf of the payor and may match name/TIN combinations). ADMINISTRATOR agrees to provide DISTRICT with the services set forth in Exhibit A.

(2) ADMINISTRATOR'S Duties. ADMINISTRATOR agrees that:

- I. It will use its best efforts to support the objectives of DISTRICT on behalf of DISTRICT;
- II. It has no authorization whatsoever from DISTRICT to alter, modify or change any of the terms, rates and/or conditions contained in any of DISTRICT's documents, proposals or contracts, nor does it have authorization to change, alter or discharge participation in DISTRICT's benefit programs, and/or to incur any indebtedness on behalf of DISTRICT;
- III. It will not circumvent, or attempt to circumvent, DISTRICT in DISTRICT's relationship with, other third-party administrators, underwriters, vendors, insurance carriers and like organizations, regardless of whether or not DISTRICT has a written contract with such third party administrators, underwriters, vendors, insurance carriers or like organizations.
- IV. It will provide comprehensive tracking of employee hours of service to determine "Full-Time" "Part-Time" status based on the DISTRICT's adoption of the IRS Safe Harbors per IRS Notices 2012-58, 2012-17, 2011-36, 2011-73. "Measurement Period Report"
- V. It will prepare and provide to the DISTRICT written Measurement Period Reports four (4) times per fiscal year on a quarterly basis.
- VI. It will prepare and provide the DISTRICT with DRAFT IRS Forms 1095C and 1095B for individuals required to receive one based on §6056 and §6055, and per the District's adoption of the IRS Safe Harbors pursuant to IRS Notices 2012-58, 2012-17, 2011-36, 2011-73
- VII. It will as be needed and/or requested by DISTRICT, revise DRAFT IRS Forms 1095C and 1095B and provide the revised forms to the District (the number of revisions will not exceed 4).
- VIII. After DISTRICT has provided written approval of the DRAFT IRS Forms 1059C and 1095B, ADMINISTRATOR will provide final forms for the DISTRICT for the DISTRICT'S production, or if DISTRICT requests, in writing, that ADMINISTRATOR distribute the final approved forms, the ADMINISTRATOR will appropriately send and file the forms on behalf of the DISTRICT
- IX. It will prepare and provide the DISTRICT with Draft IRS Forms 1094C and 1094B and thereafter, as needed and/or requested by DISTRICT, revise the forms and provide the revised forms to the DISTRICT
- X. After District has provided written approval for the IRS Forms 1094C and 1094B, ADMINISTRATOR will efile forms IRS Forms 1094C, 1094B all forms 1095C and 1095B through the IRS Affordable Care Act Information Returns Program (AIR) using ADMINISTRATOR's AIR Transmitter Control Code (TCC)

(3) DISTRICT's Duties. DISTRICT agrees:

To provide to ADMINISTRATOR current data, reports, work history, contribution rates, plan documents
related charges and the terms and conditions of DISTRICT's agreements with group health plans offered
to its employees and providers of benefit services as requested and needed by ADMINISTRATOR to

- perform its services, and to respond in a timely manner to requests for information submitted by the ADMINISTRATOR;
- II. It will not circumvent, or attempt to circumvent, ADMINISTRATOR in ADMINISTRATOR's relationship with ADMINISTRATOR's own clients, other third-party administrators, underwriters, vendors, insurance carriers and like organizations, regardless of whether or not ADMINISTRATOR has a written contract with such third party administrators, underwriters, vendors or insurance carriers.
- III. To provide and maintain an accurate list of individuals who are eligible to receive Form 1095C or 1095C (Employee List) to include the following fields:
 - a. Employee Number
 - b. Social Security Number
 - c. Last Name
 - d. First Name
 - e. Original Date of Hire
 - f. Termination or Retirement Date
 - g. Rehire Date
 - h. Current Address (Street, City, State & Zip Code)
 - i. Employee Group (As listed in payroll system)
 - j. Employee Primary Position (As listed in payroll system)
- IV. Provide and maintain an accurate report of employee contribution requirements towards single coverage as required under §6056
- Provide and maintain an accurate report of employee groups and positions offered Minimum Essential Health Care coverage as required under §6056
- VI. Provide and maintain an accurate report of employee groups and positions that are considered "Variable Hour" employees as defined in IRS Safe Harbors per IRS Notices 2012-58, 2012-17, 2011-36, 2011-73
- VII. Provide and maintain an accurate report of employee groups and positions that are considered "Non-Variable Hour" employees as defined in IRS Safe Harbors per IRS Notices 2012-58, 2012-17, 2011-36, 2011-73
- VIII. Provide and maintain and accurate report of all individuals covered under its self-insured health plan (NYSHIP ACA Enrollment Infor Report) to include the following fields:
 - a. Social Security Number as required under §6055
 - b. Last Name
 - c. First Name
 - d. Month of Coverage as required under §6055
 - e. Current Address (Street, City, State & Zip Code)
 - f. Employee Group (Retiree. Active, Other)
 - g. Medicare Primary Indicator
- IX. Errors; Review of Data. All Services provided hereunder will be based upon information provided to ADMINISTRATOR by DISTRICT. DISTRICT will promptly review all documents and reports produced by ADMINISTRATOR and provided or made available to DISTRICT by ADMINISTRATOR and District will promptly notify ADMINISTRATOR of any error or omission or discrepancy with DISTRICT's records and will provide corrected data DISTRICT agrees and acknowledges that it must review and approve the District Measurement Period Report, prior to ADMINISTRATOR producing any Draft or Final IRS Forms. The obligation of the DISTRICT to review and approve documents and reports in no way limits the ADMINISTRATOR'S responsibility to provide accurate analysis and produce accurate documents and reports (based on the documentation provided by the DISTRICT)
- X. DISTRICT agrees and acknowledges that it has the responsibility to train its employees and staff regarding and Board Resolutions pertaining to the Affordable Care Act, including Board Resolutions adopting IRS Safe Harbors per IRS Notices 2012-58, 2012-17, 2011-36, 2011-73.
- XI. DISTRICT agrees and acknowledges that it has the responsibility to train its employees and staff regarding the IRS reporting requirement under sections §4980, §6055 & §6056
- XII. DISTRICT agrees and acknowledges that it has the responsibility provide ADMINISTRATOR accurate and correct information, and DISTRICT is responsible to correct any incorrect data that it provided to ADMINISTRATOR
- XIII. <u>Records</u>. ADMINISTRATOR does not serve as DISTRICT's record keeper and DISTRICT will be responsible for retaining copies of all documentation received from or provided to ADMINISTRATOR in connection with this Agreement to the extent required by DISTRICT or applicable law.

- (4) Payments to ADMINISTRATOR. DISTRICT will pay ADMINISTRATOR \$10,500.00. in addition, DISTRICT will pay ADMINISTRATOR \$1.30 per form to print and mail IRS forms. The first payment of \$3,500.00 is due upon full execution of this Agreement. The second payment of \$3,500.00 is due within 30 calendar days of DISTRICT'S receipt of the initial draft of the 1095 forms. The final payment of \$3,500.00 plus printing and mailing fees is due after ADMINISTRATOR's completion of all services required by this Agreement. ADMINISTRATOR must submit a final invoice (form and substance satisfactory to DISTRICT) to DISTRICT. DISTRICT will make final payment within 30 calendar days of its receipt, review, and approval of invoice. In addition, upon written authorization from the DISTRICT to ADMINISTRATOR, the DISTRICT will pay ADMINISTRATOR \$275 per hour for services associated with the correction or errors contained in the documents provided to ADMINISTRATOR by the DISTRICT (including, but not limited to, incorrect date of hire, missing or incorrect termination of retirement dates, incorrect or missing social security numbers, and incorrect or missing coverage dates in health plan). ADMINISTRATOR must submit invoices (form and substances satisfactory to DISTRICT) monthly for these correction services. DISTRICT will make payment within 30 calendar days of its receipt, review, and approval of an invoice.
 - a. <u>Compliance with Individual State Reporting Requirements</u>. Should DISTRICT require ADMINISTRATOR to process individual state reporting requirements, ADMINISTRATOR will provide individual state reporting for a flat fee of \$250 per State.

(5) Term and Termination.

- I. The term of this Agreement will begin on the date of signing this Agreement and continue until the date upon which this Agreement or the Business Associate Agreement attached hereto as Exhibit B is terminated, June 30, 2022, or upon the completion of the services by ADMINISTRATOR pursuant to this Agreement, whichever is earlier.
- II. Upon termination by either party pursuant to Paragraph 5 (I.) of this Agreement prior to ADMINISTRATOR's completion of the services set forth in this Agreement, ADMINISTRATOR will only be entitled to retain monies paid by DISTRICT for the value of services performed and delivered by ADMINISTRATOR prior to the date of termination.
- III. In the event of termination for any reason, ADMINISTRATOR will return to DISTRICT, within 10 calendar days of the effective date of the termination, all DISTRICT's property and data that is in the possession of ADMINISTRATOR including, but not limited to, payroll history, employee listing and other compensation information and data on hand, and/or other confidential materials which may have been furnished by DISTRICT and entrusted to ADMINISTRATOR by reason of this Agreement. If information has been provided to ADMINISTRATOR in electronic form, ADMINISTRATOR will commit to DISTRICT that such information will be deleted from ADMINISTRATOR's electronic storage media. If requested by DISTRICT, ADMINISTRATOR will provide a certificate of destruction.
- IV. In the event of termination for any reason, all reports, and Services due to DISTRICT must be completed by ADMINISTRATOR and delivered to DISTRICT within thirty calendar days of the termination date.
- V. This Agreement may be terminated by DISTRICT "for cause" upon the occurrence of any of the following events:
 - a. Immediately upon DISTRICT delivering written notice to ADMINISTRATOR of a breach by ADMINISTRATOR of any of the policies, rules and regulations of DISTRICT relating to the health or safety of students or DISTRICT employees;
 - b. Immediately upon ADMINISTRATOR's breach of its obligations to provide the insurance coverage set forth in Paragraph 18;
 - Immediately upon ADMINISTRATOR's breach of any of ADMINISTRATOR's obligations pursuant to, or violation of, any applicable State or federal law or regulation; or
 - d. Fifteen calendar days after ADMINISTRATOR has received written notice from DISTRICT that ADMINISTRATOR has breached any of ADMINISTRATOR's other obligations hereunder unless, within the 15 calendar day period ADMINISTRATOR cures the breach to DISTRICT's satisfaction.

Upon termination of this Agreement "for cause," ADMINISTRATOR is not entitled to any further payments hereunder.

VI. This Agreement is automatically terminated upon ADMINISTRATOR's filing of a voluntary petition in bankruptcy or making an assignment for the benefit of creditors, or upon other action taken or suffered, voluntarily or involuntarily, pursuant to any federal or state law for the benefit of insolvents, and upon the filing of an involuntary petition in bankruptcy against ADMINISTRATOR which is not dismissed within 60 calendar days of filing. ADMINISTRATOR is not entitled to any further payments hereunder and if the termination occurs prior to ADMINISTRATOR's completion of the services set forth in this Agreement,

ADMINISTRATOR will only be entitled to retain monies already paid by DISTRICT for the value of services actually performed and delivered by ADMINISTRATOR prior to the date of termination.

(6) Property of ADMINISTRATOR.

I. To the extent permitted by law and except as otherwise provided herein, DISTRICT shall take reasonable steps necessary to hold in confidence and protect all trade secrets, which may include, but are not limited to, reports, documentation, techniques, products, ideas, concepts, output, and reports related to the Programs and Services of ADMINISTRATOR, from disclosure to any person, firm, corporation or other entity as allowed by law without ADMINISTRATOR's consent. DISTRICT shall ensure that all agents and any other persons with authorized access to any part of such confidential information be aware of and will observe and perform this non-disclosure covenant.

(7) Property of DISTRICT.

- I. Except as otherwise provided herein, ADMINISTRATOR will take all steps necessary to hold in confidence and protect all personal information and data, manuals, documentation, techniques, products, ideas, concepts, output, pricing, and reports related to the Programs and Services of DISTRICT, from disclosure to any person, firm, corporation or other entity without DISTRICT's written consent, provided same shall not otherwise be available. ADMINISTRATOR shall ensure that all agents and any other persons with authorized access to any part of such confidential information be aware of and will observe and perform this non-disclosure covenant.
- II. All of the undertakings and obligations of ADMINISTRATOR hereto relating to confidentiality and non-disclosure, whether contained in this Paragraph or elsewhere in this Agreement, will survive the termination or expiration of this Agreement.
- (8) Expenses. ADMINISTRATOR will pay all expenses incurred in connection with the performance of ADMINISTRATOR's duties hereunder including, but not limited to, automobile and/or travel expenses.
- (9) <u>Completion Dates and Approvals</u>: To ensure the IRS forms are produced and distributed in a timely manner to comply with the IRS Requirements.
 - a) Recipient returns (1095) need to be mailed no later than January 31, 2022, DISTRICT's final approval of the forms required by close of business January 15th, 2022.
 - b) The required date for E-filing is March 31, 2022. DISTRICT's approval of the final data must be given to us no later than March 15, 2022.
 - c) To produce DRAFT Recipient Returns for DISTRICT's review and approval, Final approval of DISTRICT's Measurement Period Report, Employee List and Healthcare Enrollment file is due by January 2nd, 2022.
- (10) Independent Contractor. ADMINISTRATOR is retained by DISTRICT only for the purposes and to the extent set forth in this Agreement. ADMINISTRATOR's relation to DISTRICT is solely that of an independent contractor during the period of ADMINISTRATOR's retention and delivery of Services hereunder.

Neither ADMINISTRATOR nor any of its employees, shareholders, partners, members, officers, directors, agents, or assigns will be eligible for employee benefits or contributions thereto from DISTRICT relative to this Agreement including, but not limited to, social security, New York State Worker's Compensation, unemployment insurance, New York State Retirement System benefits, health or dental insurance, or malpractice insurance. With regard to employees of ADMINISTRATOR, ADMINISTRATOR alone will be responsible for their work, personal conduct, direction, compensation, and for payment of all employment and other taxes in relation thereto.

- (11) Assignment. This Agreement may not be assigned or otherwise transferred by either party without the express written consent of the other.
- (12) Entire Agreement. This Agreement contains the entire agreement between the parties with respect to the subject matter thereof and supersedes any and all other agreements, understandings and representations, written or oral, by and between the parties.

- (13) <u>Modification</u>. This Agreement may not be changed orally, but only by an agreement in writing signed by both parties. Any waiver of any term, condition or provision of this Agreement will not constitute a waiver of any other term, condition or provision, nor will a waiver of any breach of any term, condition or provision constitute a waiver of any subsequent or succeeding breach.
- (14) Governing Law, Choice of Forum and Waiver of Jury Trial. This Agreement is subject to, governed by, enforced according to and construed according to the laws of the State of New York, without regard to the conflicts of law's provisions thereof. Any dispute arising under this Agreement will be litigated in a New York State Court in Suffolk County, New York. The parties each waive trial by jury in any action concerning this Agreement.
- (15) Headings. The headings or captions in this Agreement are for convenience and reference only and do not in any way modify, interpret or construe the intent of the parties or affect any of the provisions of this Agreement.
- (16) HIPAA. ADMINISTRATOR is and will remain in compliance with the privacy and security requirements of the Health Insurance Portability and Accountability Act. The parties have executed a Business Associate Agreement (attached hereto as Exhibit B).
- (17) Indemnification. To the fullest extent permitted by law, ADMINISTRATOR indemnifies and will defend (with counsel selected by DISTRICT) and hold harmless DISTRICT, its employees, agents, representatives and members of the Board of Education, from any and all liabilities, losses, costs, damages, and expenses (including, but not limited to, reasonable attorneys' fees and disbursements) arising from any claims, disputes, or causes of action of whatever nature arising, in whole or in part, from the performance of ADMINISTRATOR's Services hereunder, or the action of, or the failure to act by ADMINISTRATOR, ADMINISTRATOR's representatives or employees, or anyone for whose acts ADMINISTRATOR may be liable.

In the event that any legal proceeding is instituted or any claim or demand with respect to the foregoing is asserted by any person in respect of which indemnification may be sought from ADMINISTRATOR pursuant to the provisions of this Paragraph 17, DISTRICT will promptly notify ADMINISTRATOR of such suit, claim or demand, and give ADMINISTRATOR an opportunity to defend and settle same without any cost to DISTRICT, and will extend reasonable cooperation to ADMINISTRATOR in connection with such defense, which will be at the expense of ADMINISTRATOR. In the event that ADMINISTRATOR fails to defend the same within 30 calendar days of receipt of notice, DISTRICT will be entitled to assume the defense thereof, and ADMINISTRATOR will be liable to repay DISTRICT for all its expenses reasonably incurred in connection with the defense (including reasonable attorneys' fees, disbursements, expert witness fees and settlement payments).

To the fullest extent permitted by law, DISTRICT indemnifies and will defend and hold harmless ADMINISTRATOR, its employees, agents, and representatives from any and all liabilities, losses, costs, damages, and expenses (including, but not limited to, reasonable attorneys' fees and disbursements) arising from any claims, disputes, or causes of action of whatever nature arising from the action of, or the failure to act by DISTRICT, DISTRICT's representatives or employees, or anyone for whose acts DISTRICT may be liable.

All of the provisions of this Paragraph will survive the expiration or sooner termination of this Agreement.

- (18) Required Insurance. ADMINISTRATOR will obtain and keep in full force and effect during the term of this Agreement, at ADMINISTRATOR's sole cost and expense, the following insurance:
 - Commercial General Liability Insurance: \$1,000,000 per occurrence/ \$2,000,000 aggregate (must include coverage for sexual misconduct).
 - Workers' Compensation and N.Y.S. Disability: Statutory Workers' Compensation, Employers' Liability and N.Y.S. Disability Benefits Insurance for all employees. Proof of coverage must be on the approved specific form, as required by the New York State Workers' Compensation Board. ACORD certificates are not acceptable.
 A self-employed person and certain partners and corporate officers are excluded from the definition of "employee" pursuant to Workers' Compensation Law Section 2(4). As such, individuals in such capacity are excluded from Workers' Compensation Law coverage requirements. A person seeking an exemption must file a CE-200 form with the State. The form may be completed and submitted directly online to the Workers Compensation Board: http://www.wcb.ny.gov/content/ebiz/wc db exemptions/requestExemptionOverview.jsp

- Professional Errors and Omissions Insurance: \$2,000,000 per occurrence/ \$2,000,000 aggregate for the professional acts of ADMINISTRATOR performed under this Agreement for DISTRICT. If written on a "claims-made" basis, the retroactive date must pre-date the inception of this Agreement. Coverage must remain in effect for two calendar years following the completion of work.
- Fidelity Bond: For dishonest acts of ADMINISTRATOR's employees with coverage for computer fraud and fund transfer including client coverage.
- Excess Insurance: \$3,000,000 each occurrence and aggregate. Excess coverage must be on a follow-form basis.

Notwithstanding any terms, conditions, or provisions, in any other writing between the parties, ADMINISTRATOR hereby agrees to effectuate the naming of DISTRICT as an additional insured on ADMINISTRATOR's insurance policies, with the exception of workers' compensation, N.Y. State disability and professional liability. Each policy naming DISTRICT as an additional insured must:

- Be an insurance policy from an A.M. Best rated "secure" or better insurer, licensed in New York State.
- State that ADMINISTRATOR's coverage is primary and non-contributory coverage for DISTRICT, its Board, employees, and volunteers.

DISTRICT must be listed as an additional insured by using endorsement CG 2026 or its equivalent. The decision to accept an alternative endorsement rests solely with DISTRICT. A completed copy of the endorsement must be attached to the certificate of insurance and the certificate must state that the endorsement is being used. The certificate of insurance must describe the specific services provided by ADMINISTRATOR (e.g., physical therapy, psychological services) that are covered by the commercial general liability policy and the umbrella policy. At DISTRICT's request, ADMINISTRATOR will provide a copy of the declarations page of its liability and umbrella policies with a list of endorsements and forms. If so requested, ADMINISTRATOR will provide a copy of the policy endorsements and forms.

ADMINISTRATOR hereby indemnifies DISTRICT for any applicable deductibles and self-insured retentions, all of which are the sole responsibility of ADMINISTRATOR, to the extent not covered by the applicable policy.

If a policy is written on a "claims-made" basis, the retroactive date must pre-date the inception of this Agreement.

ADMINISTRATOR acknowledges that failure to obtain the foregoing insurance on behalf of DISTRICT constitutes a material breach of contract. ADMINISTRATOR must provide DISTRICT with proof satisfactory to DISTRICT that the above requirements have been met, prior to the commencement of work or use of DISTRICT facilities. The failure of DISTRICT to object to the contents of the certificate or the absence of same will not be deemed a waiver of any and all rights held by DISTRICT. Upon request, ADMINISTRATOR will provide DISTRICT with a copy of ADMINISTRATOR's applicable insurance policies including any endorsements, modifications, or exclusions thereto.

DISTRICT is a member/owner of the New York Schools Insurance Reciprocal ("NYSIR"). ADMINISTRATOR acknowledges that the procurement of that insurance as required herein is intended to benefit not only DISTRICT, but also NYSIR as DISTRICT's insurer.

- (19) Required Records. ADMINISTRATOR will provide services and maintain records, logs and reports in accordance with all applicable laws, regulations and requirements of the New York State Education Department, the New York State Department of Labor and District policies and procedures in force during the term of this Agreement. ADMINISTRATOR must provide District with a copy of any reports, tests, evaluations or observations that are prepared in connection with the Services provided by ADMINISTRATOR under this Agreement.
- (20) Review of Records. District will have the right to examine any or all records or accounts maintained by ADMINISTRATOR in connection with this Agreement.
- (21) District's Authority. ADMINISTRATOR acknowledges that the ADMINISTRATOR has reviewed and is familiar with the policies, rules and regulations of the DISTRICT including, but not limited to, the DISTRICT'S anti-harassment (including anti-sexual harassment) and anti-discrimination policies and regulations and the DISTRICT'S Code of Conduct (collectively, "the Policies") and the ADMINISTRATOR will cause the ADMINISTRATOR'S employees, representatives, agents, and subcontractor and any other person providing Services or present on

DISTRICT property pursuant to this Agreement (collectively, "Providers") to review and become familiar with the Policies. Copies of the Policies are available at https://www.boarddocs.com/aufsd/board.nsf/public. The ADMINISTRATOR represents and warrants that it will observe and comply with the Policies and will cause Providers to do the same. Any allegation or concern that that the ADMINISTRATOR or one of Providers has been subjected to harassment or discrimination while providing Services or while present on DISTRICT property or in the DISTRICT'S workplace pursuant to this Agreement, must be reported immediately to the Assistant Superintendent for Business (or to the Superintendent of Schools, if the Assistant Superintendent for Business is the subject of the allegation or concern). The ADMINISTRATOR represents and warrants that it has notified Providers of this notification requirement. All allegations of harassment (including sexual harassment) or discrimination will be investigated, and if appropriate, corrective action will be taken by the DISTRICT pursuant to the Policies

- (22) <u>Safeguarding Information</u>. Neither ADMINISTRATOR nor District will use or disclose any information concerning the Services pursuant this Agreement for any purpose which is prohibited by Federal and State statutes and/or regulations."
- (23) Notices. Any notices required or permitted to be given pursuant to the terms of this Agreement must be in writing and either personally delivered or sent by nationally recognized overnight carrier to the parties at the following addresses:

To ADMINISTRATOR:

To DISTRICT:

Seneca Consulting Group 960-Wheeler Road Suite 5367 Hauppauge, New York 11780 Rocky Point Union Free School District 90 Rocky Point-Yaphank Road Rocky Point NY 11778 Attention: Mr. Christopher Van Cott

- (24) Waiver. Any waiver of any term, condition or provision of this Agreement will not constitute a waiver of any other term, condition, or provision, nor will a waiver of any breach of any term, condition or provision constitute a waiver of any subsequent or succeeding breach.
- (25) Third-Party Beneficiaries. There are no third-party beneficiaries of or in this Agreement, other than NYSIR.
- (26) Negotiated Agreement. This is a negotiated Agreement. It will not be construed against any party by reason of this Agreement being prepared by that party's attorney. Each party warrants that it/he/she has full power to execute, deliver and perform this Agreement and has taken all actions required by law, organizational documents or otherwise to authorize the execution and delivery of this Agreement.
- (27) Iran Divestment Act of 2012. By signing this Agreement, each person and each person signing on behalf of any other party certifies, and in the case of a joint bid or partnership each party thereto certifies as to its/his/her own organization, under penalty of perjury, that to the best of its/his/her knowledge and belief that each person is not on the list created pursuant New York State Finance Law § 165-a(3)(b).
- (28) Confidentiality of Records and Data Security and Privacy. ADMINISTRATOR must comply with all District policies and State, federal, and local laws, regulations, rules, and requirements related to the confidentiality of records and data security and privacy.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement the date and year first above written.

Rocky Point Union Free School District	SENECA CONSULTING GROUP, INC
Ву:	Genel Wepmento
Name:	Name: Daniel C. Opinante Title: President
Title:	

EXHIBIT A

Affordable Care Act Employer Compliance Proposal and Scope of Work

SPECIFICATION OF SERVICES

ADMINISTRATOR will assist DISTRICT with meeting the DISTRICT's "Employer Mandate" obligations and reporting requirements pursuant to the ACA by:

- Identifying in writing DISTRICT's employees (both full-time and variable-hour employees) for whom DISTRICT may be liable for a Section 4980H penalty if affordable, minimum essential coverage providing minimum value is not offered;
- Identifying which type of minimum essential coverage would be deemed "affordable" under ACA for its full-time eligible employees (applying, for example, the "Form W-2" safe harbor);
- Offering strategies and helping DISTRICT apply the "Look-Back/Stability Period Safe Harbor" Measurement Method (a.k.a. "Look-Back Measurement Method") under the ACA to new and ongoing employees of DISTRICT;
- Identifying and accounting for any applicable employment break periods and/or periods of special unpaid leave for each DISTRICT employee who is evaluated using the Look-Back Measurement Method;
- Identifying in writing which DISTRICT employees must be treated as a new, ongoing, variable-hour, full-time, part-time and/or seasonal employees under ACA for purposes of applying the Look-Back Measurement Method and for determining those employees for whom the District may be liable for a Section 4980H penalty if affordable, minimum essential coverage providing minimum value is not offered;
- Reviewing collective bargaining agreements ("CBAs"), individual employment contracts, Board
 of Education resolutions, letters of understanding and any other documentation setting forth terms
 and conditions of employment and helping DISTRICT determine how each affects DISTRICT's
 obligations under ACA;
- Providing DISTRICT with a written penalty analysis for: (1) failing to offer minimum essential coverage as required by ACA; (2) offering minimum essential coverage that does not provide minimum value; (3) providing minimum essential coverage that is not "affordable" under ACA standards; and (4) providing coverage that does not satisfy the non-discrimination rule under ACA; and
- Assisting and supporting DISTRICT with audits, inquiries and/or investigations conducted by the Federal oversight agencies including, but not limited to, a response to any notices of a potential Section 4980H penalty;
- Preparing and electronically filing/sending Internal Revenue Code Section 6056 reports as DISTRICT's authorized agent including, but not limited to:
 - Using a secure method of delivery to import applicable DISTRICT data furnished by DISTRICT;
 - o Drafting IRS Forms 1094-C and 1095-C;
 - On or before January 15th 2022 sending completed 1095-B and 1095-C forms to DISTRICT for DISTRICT's review and written approval (DISTRICT's written approval must be received by 5:00 p.m. on January 15th 2022);
 - Upon receipt of DISTRICT's written approval, furnishing all full-time employees with a copy of IRS Form 1095-C on or before January 31st 2022;
 - Upon receipt of DISTRICT's written approval, electronically filing 1094-C and 1095-C forms with IRS on or before March 31st 2022; and
 - Providing the District with confirmation of IRS acceptance of the forms.

- Calculating the hours of service performed by each employee on a weekly and monthly basis including, but not limited to, regular workday, overtime, paid leave time, special unpaid leave time and stipends (each calculation will accurately reflect the hours of service for a particular week or month, even if the time is not entered into District's payroll system until after that week or month has concluded);
- Calculating the average hours of service performed by each employee during the initial or standard measurement period;
- Helping DISTRICT:
 - Determine the relevant "plan years"
 - Identify, establish and apply the most beneficial measurement periods (e.g., 3-12 months, etc.) including, if recommended, different measurement periods for different categories of employees, for:
 - · Initial Measurement Periods;
 - Standard Measurement Periods;
 - Stability Periods; and
 - Administrative Periods;
- Analyzing and advising in writing whether DISTRICT's currently offered health insurance plans are "affordable" based on ACA requirements and offering options for alternate health insurance plans that comply with ACA;
- Analyzing and advising in writing which is the best "safe harbor" option under ACA for calculating the affordability of health insurance coverage in accordance with each eligible DISTRICT employees' income;
- Providing written assurances that current DISTRICT health insurance offerings meet the ACA standards for "minimum essential coverage";
- Analyzing and advising DISTRICT in writing to determine what, when and how many notices required by ACA must be provided to its employees and providing the required notices to the employees;
- Providing DISTRICT with a clear understanding of the New York State Health Insurance Exchange and its implications for DISTRICT and DISTRICT employees, if any;
- Ensuring that new and existing employees of DISTRICT are treated correctly and consistently with respect to ACA requirements;
- Developing strategies for timely enrolling in a DISTRICT health insurance plan those employees
 who meet the applicable legal threshold for average hours worked during the relevant period of
 time and, as a result, for whom DISTRICT may be liable for a Section 4980H penalty if
 affordable, minimum essential coverage providing minimum value is not offered;
- Revising compliance procedures as the Federal Government makes ongoing changes and adjustments to the ACA; and
- Providing DISTRICT with a reference manual (a "Compliance Report") that documents all of the advice, analysis, calculations, recommendations, procedures and protocol that relate to this Agreement.

EXHIBIT B BUSINESS ASSOCIATE AGREEMENT

This Agreement ("Agreement") between Seneca Consulting Group, Inc., a New York Corporation with principal office and place of business at 960 Wheeler Road #5367 Hauppauge, NY 11788 (herein "CONSULTANT") and Rocky Point Union Free School District, having its principal place of business at 90 Rocky Point-Yaphank Road Rocky Point NY 11778, (hereinafter referred to as the "District").

WITNESSETH

WHEREAS, CONSULTANT provides employee benefit consulting services to District which relates to the group health insurance program provided to the participants of such District; and

WHEREAS, the parties acknowledge that they are subject to the rules of HIPAA and that this Agreement is required by HIPAA regarding certain EDI, Privacy and Security standards applicable to this Agreement; and

WHEREAS, District and CONSULTANT have entered into a relationship under which CONSULTANT may receive, use, obtain, access or create Protected Health Information (as that term is defined in Paragraph I(e) of this Exhibit to the Agreement) from or on behalf of District in the course of providing goods and services to District and its participants; and

WHEREAS, such Protected Health Information is confidential and must be afforded special treatment and protection, such that all information can be used or disclosed only in accordance with the Standards for Privacy of Individually Identifiable Health Information set forth at 45 CFR Parts 160 and 164 (hereinafter "the Privacy Rule") as implemented in the parties' relationship by this Agreement; and

WHEREAS, CONSULTANT acknowledges that it is a Consultant of District under the terms of HIPAA in its operation of this Agreement.

I Definitions.

- (a) Breach. "Breach" shall have the same meaning as the term "breach" in Section 13400(1) of the HITECH Act
- (b) Designated Record Set. "Designated Record Set" shall have the same meaning as the term "designated record set" in 45 CFR 164.501, limited to the information created or received by CONSULTANT from or on behalf of District.
- (c) De-identify/De-identified. "De-identify/De-identified" means to remove, encode, encrypt, or otherwise eliminate or conceal data that identifies an individual, or modifies information so that there is no reasonable basis to believe that the information can be used to identify an individual
- (d) Disclose. The release transfer or provision of access to PHI, whether oral or recorded in any form or medium.
- (e) Individual. "Individual" shall have the same meaning as the term "individual" in 45 CFR 164.501 and shall include a person who qualifies as a personal representative in accordance with 45 CFR 164.502(g).
- (f) Privacy Rule. "Privacy Rule" shall mean the Standards for Privacy of Individually Identifiable Health Information at 45 CFR part 160 and part 164, subparts A and E.
- (g) Protected Health Information. "Protected Health Information" shall have the same meaning as the term "protected health information" in 45 CFR 164.501, limited to the information created or received by Consultant from or on behalf of District.
- (h) Secretary. "Secretary" shall mean the Secretary of the Department of Health and Human Services or his designee.
- (i) Business Associate. "Business Associate" shall mean Consultant.

 Covered Entity. "Covered Entity" shall mean Rocky Point Union Free School District
- (j) Minimum Necessary Information. "Minimum Necessary Information" means (i) in the case of routine and recurring types of disclosures, the set of data or records which the disclosing party's policies and procedures have established as reasonably necessary to achieve the purpose of such disclosures; and (ii) in the case of non-routine and non-recurring disclosures, the set of data or records which the Disclosing Party determines is reasonably necessary to accomplish the purpose of the disclosure, upon review of each disclosure according to criteria developed by the Disclosing Party; provided that in the case of disclosure (A) to a

Covered Entity, (B) to a professional for purposes of providing professional services to the Disclosing Party, or (C) to a public official for disclosures which are permitted by law without Individual consent, the Minimum Necessary Information shall be the set of data or records requested by that party, upon the party's reasonable representation that the request is for the minimum necessary given the purpose of disclosure(s).

131. Obligations and Activities of Consultant. Consultant agrees to:

- (a) not use or disclose Protected Health Information other than as permitted or required by this Agreement or as required By Law.
- (b) use appropriate safeguards to prevent use or disclosure of the Protected Health Information other than as provided for by this Agreement.
- (c) mitigate, to the extent practicable, any harmful effect that is known to Consultant of a use or disclosure of Protected Health Information by Consultant in violation of the requirements of this Agreement.
- (d) report to District within forty-eight (48) hours any use or disclosure of the Protected Health Information not provided for by this Agreement of which it becomes aware.
- (e) ensure that any agent, including a subcontractor, to whom it provides Protected Health Information received from, or created or received by Consultant on behalf of District agrees to the same restrictions and conditions that apply through this Agreement to Consultant with respect to such information.
- (f) provide access, at the request of District, within 48 hours, to Protected Health Information in a Designated Record Set, to District or, as directed by District, to an Individual in order to meet the requirements under 45 CFR 164.524.
- (g) make any amendment(s) to Protected Health Information in a Designated Record Set that the District directs or agrees to pursuant to 45 CFR 164.526 at the request of District or an Individual, and within 48 hours of such request.
- (h) make internal practices, books, and records, including policies and procedures and Protected Health Information, relating to the use and disclosure of Protected Health Information received from, or created or received by Consultant on behalf of, District available to the District, or to the Secretary, in a time and manner or designated by the Secretary, for purposes of the Secretary determining District's compliance with the Privacy Rule.
- (i) document such disclosures of Protected Health Information and information related to such disclosures as would be required for District to respond to a request by an Individual for an accounting of disclosures of Protected Health Information in accordance with 45 CFR 164.528.
- (j) provide to District or an Individual, within 48 hours of a request, information collected in accordance with Section (i) above of this Agreement, to permit District to respond to a request by an Individual for an accounting of disclosures of Protected Health Information in accordance with 45 CFR 164.528.

132. <u>Permitted Uses and Disclosures by Consultant.</u>

Except as otherwise limited in this Agreement, Consultant may use or disclose Protected Health Information to perform functions, activities, or services for, or on behalf of, District, provided that such use or disclosure would not violate the Privacy Rule if done by District or the minimum necessary policies and procedures of the District.

133. Obligations of District. District shall:

- (a) notify Consultant of any limitation(s) in its notice of privacy practices of District in accordance with 45 CFR 164.520, to the extent that such limitation may affect Consultant's use or disclosure of Protected Health Information.
- (a) District agrees to disclose PHI to Consultant upon its own volition, upon consultant's request, or upon the request of a third party if such disclosure is permissible by law, so that consultant may provide the agreed to services to or on behalf of District, District otherwise objects to the disclosure, or CONSULTANT is no longer providing the services to District.
- (b) notify Consultant of any changes in, or revocation of, permission by Individual to use or disclose Protected Health Information, to the extent that such changes may affect Consultant's use or disclosure of Protected Health Information.
- (c) notify Consultant of any restriction to the use or disclosure of Protected Health Information that District has agreed to in accordance with 45 CFR 164.522, to the extent that such restriction may affect Consultant's use or disclosure of Protected Health Information.

5. Permissible Requests by District

District shall not request Consultant to use or disclose Protected Health Information in any manner that would not be permissible under the Privacy Rule if done by District.

6. <u>Term and Termination</u>

- (a) <u>Term.</u> This Agreement shall be effective from the date the parties sign the attached Benefit Consulting Agreement (the "Effective Date"), until the later of 1) the date of termination of the aforementioned Benefit Consulting Agreement or 2) the date one of the parties terminates the Agreement pursuant to subdivision (b) of this paragraph, or 3) the date when all of the Protected Health Information provided by the District to Consultant or created or received by Consultant on behalf of District, is destroyed or returned to District, or, if it is infeasible to return or destroy Protected Health Information, protections are extended to such information in accordance with the provisions of Subdivision (c) of this paragraph 6.
- (b) <u>Termination</u> Either party may terminate this Agreement upon thirty (30) days 'notice to the other party, which shall serve to terminate the Benefit Consulting Agreement as well:

(c) Effect of Termination.

- i. Except as provided below in paragraph (ii) of this section, upon termination of this Agreement, for any reason, Consultant shall immediately return or if directed by the District, destroy all Protected Health Information received from District, or created or received by Consultant on behalf of District. This provision shall apply to Protected Health Information that is in the possession of subcontractors or agents of Consultant. Consultant shall retain no copies of the Protected Health Information.
- ii. In the event that Consultant determines that returning or destroying the Protected Health Information is infeasible, Consultant shall provide immediately to District notification of the conditions that make return or destruction infeasible. Upon submittal of written proof, satisfactory to District, that return or destruction of Protected Health Information is infeasible, Consultant shall extend the protections of this Agreement to such Protected Health Information and limit further uses and disclosures of such Protected Health Information to those purposes that make the return or destruction infeasible, for so long as Consultant maintains such Protected Health Information.

7. Indemnification.

Consultant agrees to indemnify, defend and hold harmless District and their affiliates, trustees, officers, directors, employees, successors and assigns from and against any and all claims, penalties, liabilities, losses, damages, suites, settlements, judgments or costs, including reasonable attorneys' fees, which may arise from the acts or omissions of Consultants in performing under this Agreement.

8. Audit.

Upon sixty (60) days' prior notice, District may audit Consultant's performance pursuant to this Agreement, including, but not limited to, the internal privacy practices of Consultant. District shall choose the Auditor in its sole discretion. The Audit shall be conducted on CONSULTANT's premises during regular business hours and CONSULTANT shall make available its books, records and procedures regarding compliance with Health Insurance Portability and Accountability Act of 1996 Privacy Rule and any applicable amendments thereto.

9. Miscellaneous.

- (a) Regulatory References. A reference in the Agreement to a section in the Privacy Rule means the section as in effect or as amended.
- (b) Amendment. The Parties agree to take such action as is necessary to amend the Agreement from time to time pursuant to a written agreement signed by the Parties and is necessary for District to comply with the requirements of the Privacy Rule and the Health Insurance Portability and Accountability Act of 1996, Pub. L. No. 104-191
- (c) Survival. The respective rights and obligations of Consultant under Section 2(f), 2(g), 6(c) and (7) of this Exhibit "B" shall survive the termination of the Agreement.
- (d) Interpretation. Any ambiguity in the Agreement shall be resolved to permit District to comply with the Privacy Rule.
- (e) Notices. Any notice required to be given under this Agreement shall be in writing and sent by confirmed facsimile or by certified mail, return receipt requested at the address set forth above or at such other address as the parties may designate from time to time.

NOW, THEREFORE, in consideration of the mutual promises contained herein and other good and valuable consideration, receipt of which is hereby acknowledged, the parties agree as follows:

The parties agree that for purposes of HIPAA CONSULTANT shall be deemed a Consultant of District. CONSULTANT agrees to continue to perform, on behalf of District, all transactions that are considered Covered Transactions, as that term is defined by HIPAA and function as District's Clearinghouse, as that term is defined by HIPAA, and therefore further agrees to comply with HIPAA's standards regarding EDI, Privacy and Security. In no event shall District be required to provide CONSULTANT with any information in a format that meets the EDI standards of HIPAA.

¹ IN WITNESS WHEREOF, the duly designated representatives of District and CONSULTANT have executed this Agreement and have evidenced their ratification and consent to be bound by the Agreement contained herein, as of the effective date of this Agreement.

Rocky Point Union Free School District	SENECA CONSULTING GROUP, INC	
By:	Genell pineuts By:	
Name:	Name: Daniel C. Opinante	
Title:	Title: President	

Phone: (631) 331-8888 Fax: (631) 331-8834





Port Jefferson Station, New York 11776

www.munistat.com

MUNICIPAL ADVISOR SERVICES AGREEMENT

THIS MUNICIPAL ADVISOR SERVICES AGREEMENT (the "Agreement") is entered into as of, April 20, 2021 (the "Effective Date") between the Rocky Point Union Free School District, ("District") and Munistat Services, Inc. ("Munistat") (collectively referred to herein as the "Parties").

RECITALS

WHEREAS, Munistat is a Municipal Advisory firm specializing in municipal finance and municipal government related matters; and

WHEREAS, the District desires to engage Munistat to provide certain services relative to the issuance of the certain obligations as set forth in **Appendix A** ("Work Orders"), and Munistat desires to provide services to the District in connection with such Work Orders.

AGREEMENT

NOW THEREFOR, the Parties agree as follows:

- 1. <u>Municipal Advisory Services.</u> The Parties hereto agree that Munistat shall provide those services set forth in the Work Orders, and Munistat's services as the District's Municipal Advisor shall be expressly limited to the services noted therein.
- 2. <u>Term and Termination</u>. This Agreement shall be effective as of the Effective Date and shall remain in effect until terminated by either party upon (30) days written notice; provided, however, that in the event of termination of any such engagement, Munistat reserves that right to assess fees for any work performed pursuant to a Work Order in accordance with the Fee Schedule set forth in **Appendix B**.
- 3. Agreement to Provide Information. The District agrees to provide Munistat with factual, not misleading information as shall be required by Munistat in furtherance of the services set forth herein, including financial statements, budgets, and other relevant documents. The District further agrees to not intentionally omit any material information relevant to Munistat's provision of services. Munistat agrees to promptly amend or supplement this Agreement to reflect any material changes or additions to this Agreement, including material changes to the information provided.
- 4. <u>Compensation</u>. Munistat shall receive a fee for any services rendered to the District pursuant to this Agreement in accordance with the fee schedule set forth in Appendix B attached hereto and incorporated herein by reference.

- 5. <u>Indemnity</u>. Each party shall defend, indemnify and hold harmless the other from and against any and all claims, demands, expenses, cost or causes, arising out of or in connection with any claim, suit, action, or proceeding for personal injury, death or property damage sustained or incurred as a result of any act, failure, or default by the other party's employee while acting within the scope of their duties as determined by this Agreement.
- 6. Required Regulatory Disclosures. Munistat is registered as a "Municipal Advisor" pursuant to Section 15B of the Securities Exchange Act and rules and regulations adopted by the United States Securities and Exchange Commission ("SEC") (Registration #867-00429) and the Municipal Securities Rulemaking Board ("MSRB") (Registration #K0114). As part of this SEC registration Munistat is required to disclose to the SEC information regarding criminal actions, regulatory actions, investigations, terminations, judgments, liens, civil judicial actions, customer complaints, arbitrations and civil litigation involving Munistat. Pursuant to MSRB Rule G-42, Munistat is required to disclose any legal or disciplinary event that is material to the District's evaluation of Munistat or the integrity of its management or advisory personnel. Munistat has determined that no such event exists. Copies of Munistat's filings with the United States Securities and Exchange Commission can currently be found by accessing the SEC's EDGAR system Company Search Page which is currently available https://www.sec.gov/edgar/searchedgar/ companysearch.html and searching for either "Munistat Services Inc." or for our CIK number which is 0001608472.

The MSRB has made available on its website (<u>www.msrb.org</u>) a municipal advisory client brochure that describes the protections that may be provided by MSRB rules and how to file a complaint with the appropriate regulatory authority.

7. <u>Disclosure of Conflicts of Interest</u>. The District acknowledges that it has received those disclosures set forth and contained within **Appendix C** attached hereto and incorporated herein by reference. The District further acknowledges that it has been given the opportunity to raise questions and discuss such disclosures with Munistat and that it fully appreciates the nature of such disclosures and any and all conflicts noted therein. The District hereby waives such conflicts and authorizes Munistat to provide services pursuant to this Agreement. From time to time, Munistat may provide additional conflict of interest disclosures to the District as noted in Appendix C. In this regard, District hereby authorizes the Assistant Superintendent for Business to acknowledge and/or waive any such additional conflict of interest disclosures of Munistat on behalf of the District.

Munistat certifies, under penalty of perjury, that it has and implemented a written policy addressing sexual harassment prevention in the workplace and provides annual sexual harassment prevention training to all of its employees. Our policy meets the requirements of section 201-g of the Labor Law.

[Signature page follows]

SIGNATURE PAGE

IN WITNESS WHEREOF, the Parties hereto have caused this Agreement to be duly executed by their respective representatives as of the date first written above.

ROCKY POINT UNION FREE SCHOOL DISTRICT	MUNISTAT SERVICES, INC.
	Mich Spell
Ву:	Ву:
Name:	Name: Noah Nadelson
Title:	Title: Chief Executive Officer

APPENDIX A

SERVICES

FOR THE TANS

- 1. All necessary research and analysis for, and preparation of, the Preliminary Official Statement, in accordance with the SEC Disclosure Regulations.
- 2. If a rating on the TAN's is requested, we will submit all required documents and information to the appropriate rating agency and represent the District in the credit evaluation conference call.
- 3. Supervise word processing and proofreading of the Preliminary Official Statement and Notice of Sale and effect electronic dissemination of such documents to prospective bidders.
- 4. Preparation and filing of required documents for The Depository Trust Company (DTC).
- 5. Be present at the bid opening; arrange for and be present to assist at the closing.
- 6. Preparation and distribution of Final Official Statements in accordance with purchasers' requests.
- 7. Preparation of the computation of note interest due for use in the budget and cash flow processes.

FOR THE SEC FILING REQUIREMENT

As the District's designated dissemination agent, we will be responsible for all necessary research and analysis in order to prepare the Annual Information Statement as required and will file it together with the audited financial statements of the District, on or before the due date with The Electronic Municipal Market Access System ("EMMA") accordance with SEC Rule 15c12-12 and the District's Undertaking to Provide Continuing Disclosure. We will also be responsible for the filing of all Notices of Material Events with EMMA at no additional charge.

APPENDIX B

FEE SCHEDULE

The all-inclusive fee for our services will be \$9,000 (\$6,500 for the TAN's and \$2,500 for the SEC filing). The administrative and out-of-pocket costs, such as postage, word processing, overnight delivery charges, website posting, email distribution of Final Official Statements, state filings, submission of documents to ratings agencies and The Depository Trust Company, copies and scanning are included in the fees set forth above.

APPENDIX C

DISCLOSURE OF CONFLICTS OF INTEREST

FIXED FEE

Under a fixed fee form of compensation, the municipal advisor is paid a fixed amount established at the outset of the transaction. The amount is usually based upon an analysis by the client and the advisor of, among other things, the expected duration and complexity of the transaction and the agreed-upon scope of work that the advisor will perform. This form of compensation presents a potential conflict of interest because, if the transaction requires more work than originally contemplated, the advisor may suffer a loss. Thus, the advisor may recommend less time-consuming alternatives, or fail to do a thorough analysis of alternatives. There may be additional conflicts of interest if the municipal advisor's fee is contingent upon the successful completion of a financing, as described below.

CONTINGENT COMPENSATION

The fees to be paid by the District to Munistat Services, Inc. are contingent on the successful closing of the transaction. Although this form of compensation may be customary, it presents a conflict because Munistat Services, Inc. may have an incentive to recommend unnecessary financings to the District. For example, when facts or circumstances arise that could cause the financing or other transaction to be delayed or fail to close, Munistat Services, Inc. may have an incentive to discourage consideration of alternatives that may result in the cancellation of the financing or other transaction.

Munistat Services, Inc. manages and mitigates these conflicts primarily by adherence to the fiduciary duty which it owes to municipal entities which require it to put the interests of the District ahead of its own.

OTHER MATERIAL CONFLICTS OF INTEREST

Munistat Services, Inc. has determined, after exercising reasonable diligence, that it has no other known material conflicts of interest that would impair its ability to provide advice to the District in accordance with its fiduciary duty to municipal entity clients. To the extent any such material conflicts of interest arise after the date of this Agreement, Munistat Services, Inc. will provide information with respect to the District and such additional information shall be incorporated by reference into this Agreement to the same extent as if set forth herein.

Center Moriches Union Free School District

BOARD OF EDUCATION

George Maxwell, President Danielle Dench, Vice President

Marcus Babzien Robyn Rayburn Thomas Kelly

Jeannine Barr
District Clerk
Diane M. Smith
Treasurer

529 Main Street
Center Moriches, New York 11934
(631) 878-0052
Fax (631) 878-4326
www.cmschools.org

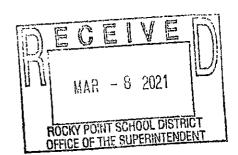
Dr. Ronald M. Masera
Superintendent of Schools
Ms. Raina Ingoglia
Assistant Superintendent for Curriculum,
Instruction, Data Coordination and
Buildings and Grounds
Mr. Ricardo Soto

Assistant Superintendent for Student Services,
Personnel and Instructional Technology
Ms. Keri Loughlin
Assistant Superintendent for Business

March 4, 2021

Dr. Scott O'Brien Superintendent of Schools Rocky Point UFSD 90 Rocky Point- Yaphank Rd. Rocky Point, NY 11778

Dear Dr. O'Brien:



1 am forwarding three (3) health services contracts for the 2020-2021 school year signed by the Center Moriches UFSD Board of Education president and the Superintendent of Schools. Please send (2) contracts signed as indicated and return them to my office. Please keep one duly executed contract for your district.

Included in this mailing is a list of students, a calculation of costs, and an invoice.

Thank you for your attention to this matter.

Sincerely,

Keri Loughlin

Assistant Superintendent for Business

jm enc.

Center Moriches Union Free School District

BOARD OF EDUCATION

George Maxwell, President
Danielle Dench, Vice President
Marcus Bahzien

Marcus Babzien Robyn Rayburn Thomas Kelly

Jeannine Barr District Clerk Diane M. Smith Treasurer 529 Main Street Center Moriches, New York 11934 (631) 878-0052 Fax (631) 878-4326 www.cmschools.org

Dr. Ronald M. Masera
Superintendent of Schools
Ms. Raina Ingoglia
Assistant Superintendent for Curriculum,
Instruction, Data Coordination and
Buildings and Grounds
Mr. Ricardo Soto
Assistant Superintendent for Student Services,
Personnel and Instructional Technology
Ms. Keri Loughlin
Assistant Superintendent for Business

CONTRACT FOR HEALTH AND WELFARE SERVICES

THIS AGREEMENT made in triplicate this First day of July 2020, by and between the Board of Education of the Rocky Point Union Free School District, 90 Rocky Point-Yaphank Rd., Rocky Point, New York, party of the first part, and the Board of Education, Center Moriches Union Free School District of Center Moriches, New York, party of the second part.

WITNESSETH, That whereas party of the first part has been duly empowered by the provisions of Section 912 of the Education Law to enter into a contract for the purpose of providing health and welfare services for children residing in said school district and attending nonpublic schools in Center Moriches School District, Center Moriches, New York, to begin on September 1, 2020, and to end June 30, 2021.

Now, Therefore, the said party of the first part hereby agrees to pay the party of the second part the sum of \$2,287.29 for health and welfare services to be provided under Section 912 for 3 children residing in said school district of Middle Country Central School District, New York, and attending nonpublic schools in said Center Moriches Union Free School District, of Center Moriches, New York.

And the party of the second part hereby agrees with the party of the first part as follows:

The services provided by *Center Moriches UFSD* shall be consistent with the services available to students attending public schools within the *Center Moriches UFSD* and may include, but are not limited to:

- a. all services performed by a physician, physician assistant, dentist, dental hygienist, registered professional nurse, nurse practitioner, school psychologist, school social worker, or school speech therapist,
- b. dental prophylaxis,
- c. vision and hearing screening examinations,
- d. the taking of medical histories and the administration of health screening tests,
- e. the maintenance of cumulative health records, and
- f. the administration of emergency care programs for ill or injured students.

It is expressly understood and agreed between the parties that the services to be provided pursuant to this Agreement shall not include any teaching services.

The party of the second part will also furnish the following equipment to be used in providing such services if requested by the authorities in charge of the nonpublic school:

Supplies and equipment for use by physician, school nurse-teacher, psychologist, dental hygienist, social worker, and speech correctionist (i.e. scales, vision and hearing testing devices, health record forms, first-aid supplies, and all other readily transportable equipment and supplies pertaining to delivery of services).

It is expressly agreed by and between the parties hereto that the services agreed to be supplied under this contract shall not include any teaching services.

It is mutually agreed that this contract shall not become valid and binding upon either party thereto until the same shall be approved by the (District) superintendent of schools.

In Witness Whereof, the parties have hereunto set their hands the day and year above written.

SENDER School District Center Moriches School District

Superintendent of Schools

SENDER School District,

Center Moriches School District

President Board of Foucation

PROVIDER School District Rocky Point Union Free School District

President, Board of Education

Center Moriches Union Free School District Center Moriches, NY 11934

Health Services 2020-2021

Category	Costs 20/21

Psychologists, Speech Therapists, Nurses, Social Workers, Pupil Services,

\$1,290,229.67 Physicians, Salaries and Benefits

\$4,500.00 Equipment

\$13,600.00 Supplies and Services

\$1,308,329.67 **TOTAL**

School Census

Total District Enrollments

Our Lady Queen of Apostles	153
L. Burket Christian School	60
Center Moriches Public Schools	1503
Total	1716

Per Pupil Calculation: Total Cost/Total Enrollment:

\$1,308,330 / 1716

\$762.43

per pupil

Center Moriches U.F.S.D. - Our Lady Queen of Apostles 2020-2021 Health Services Listing

Grade	Student	District	Address	Town	
K		RP	· .	Sound Beach	
K		RP		Sound Beach	
2nd		RP		Sound Beach	
3					

Center Moriches UFSD

529 Main Street Center Moriches, NY 11934 INVOICE

Invoice Date

02/12/202

Customer No.

3;

Customer///Bill To: 4

ROCKY POINT UFSD ATTN: SCHOOL BUSINESS OFFICIAL 90 ROCKY POINT YAPHANK RD. ROCKY POINT, NY 11778

Remit To:

Center Moriches UFSD 529 Main Street Center Moriches, NY 11934 **ATTN: Business Office**

	Fax 5	E Mail Address		Terms		Invoice/Amount
631-878-0052	631-878-4326		Cost Basis	DUE UPON RE		2,287.29 Amoun
HEALTH SERVICES	TH SERVICES - 3 STUDENTS		ANN	3.00	762.430	
					TOTAL	-: 2,287. 2!

Page 1 of 1

DETACH HERE AND SEND WITH PAYMENT

ROCKY POINT UFSD

ATTN: SCHOOL BUSINESS OFFICIAL 90 ROCKY POINT YAPHANK RD. **ROCKY POINT, NY 11778**

Invoice No.

4557

Invoice Date

02/12/2021

Customer No.

37

Total Due:

\$2,287.29

Payment Terms: DUE UPON RECEIPT

Mail Payments To:

Center Moriches UFSD 529 Main Street Center Moriches, NY 11934 **ATTN: Business Office**



Houghton Mifflin Harcourt

Proposal

Prepared For

Rocky Point Union Free SD

Attention:

Melinda Brooke mbrooks@rockypoint.k12.ny.us

For the Purchase of:

Into Reading K-5 - 3 Year Subscription

Prepared By
Heather Herrero
heather.herrero@hmhco.com

Please submit this proposal with your purchase order.

Purchase orders or duly executed service agreements for **Professional Services** purchased, must be submitted at least 30 days before the service event date.

Attention:
Melinda Brooke
mbrooks@rockypoint.k12.ny.us

Customer Experience 9400 South Park Center Loop Orlando, FL 32819 FAX: 800-269-5232 k12orders@hmhco.com

	ISBN	Title	Price	Quar	Value ntity Mate		ue of Free Naterials	Value of Charged Materials	
Si	<u>Grade K</u> tudent Print & Di	gital Licenses							
1789483	9780358399629	Into Reading Student License Print/Digital 3 Year Grade K	\$81.00	190	\$15,390.00	\$2,000.70	\$13,389.30	•	
		g Student myBook Softcover 3 Year Print							
	Grade K Digital Stud	ent Resources 3 Year Digital Grade K-6							
		3619 iREAD 1 Year Online Student Access							
T	otal for Student l	Print & Digital Licenses	\$13,389.30						
T	eacher Digital Li	censes							
1790235	9780358405658	Into Reading Digital Teacher Resources 3 Year Grades K-6	\$270.00	15	\$4,050.00	\$4,050.00			
T	Total for Teacher Digital Licenses								
A	A la Carte Items Available for Purchase								
iF	Read								
s	tudent Licenses								
1747072	9780358091783	2020 Into Reading IRead Student Online 3 Year Grades K-2	\$30.00	45	\$1,350.00	\$175.50	\$1,174.50	l	
т	eacher Licenses								
17 47445	9780358091813	2020 Into Reading IRead Teacher Online 3 Year Grades K-2	\$360.00	14	\$5,040.00	\$5,040.00			
Т	eacher Materials	•							
1770960	9780358255048	Into Reading Rigby Guided Reading Coaching Cards Grade K-2	\$71.45	13	\$928.85		\$928.85		
1737700	9780358010562	2020 Into Reading Teacher's Guide Set Grade K	\$140.00	14	\$1,960.00	\$254.80	\$1,705.20)	
1712781	9781328460561	Into Reading Bookstix Grade K	\$5.99	13	\$77.87	\$10.14	\$67.73		
1716734	9781328491602	Into Reading Tabletop Minilessons English Language Development Grade K	\$31.00	1	\$31.00	\$4.03	\$26.97		
1721083	9781328522900	Into Reading Tabletop Minilessons Reading Grade K	\$31.00	17	\$527.00	\$68.51	\$458.49		
1736143	9781328639035	Into Reading Big Book Set Grade K	\$220.00	13	\$2,860.00	\$371.80	\$2,488.20)	
1742471	9780358056287	Into Reading Instructional Card Kit Grade K	\$69.44	13	\$902.72	\$117.39	\$785.33		
1736012	9781328639028	Into Reading Read Aloud Set Grade K	\$120.00	13	\$1,560.00	\$202.80	\$1,357.20)	
1736277	9780358001508	Into Reading Rigby Leveled Library with Take and Teach Lessons Grade K	\$1,000.00	13	\$13,000.00	\$1,690.00	\$11,310.0	0	

Attention: Melinda Brooke mbrooks@rockypoint.k12.ny.us Customer Experience 9400 South Park Center Loop Orlando, FL 32819 FAX: 800-269-5232

Expiration Date: 9/30/2020

Expiration Date: 9/30/2020

	ISBN	Title	Price	Quan	Value tity Mate		ie of Free aterials	Value of Charged Materials
1738477	9780358019831	Into Reading Start Right Reader Set of 6 Grade K	\$162.00	13	\$2,106.00	\$273.78	\$1,832.22	
1728737	9781328581655	Into Reading Guiding Principles and Strategies Grade K	\$10.41	13	\$135.33	\$17.55	\$117.78	
1711944	9781328453570	Into Reading Poster Set Grade K	\$38.41	13	\$499.33	\$64.87	\$434.46	
1712780	9781328460554	Into Reading Teacher Resource Book Grade K	\$14.00	13	\$182.00	\$23.66	\$158.34	
1736144	9781328639042	Into Reading Little Big Book Set of 6 Grade K	\$300.00	13	\$3,900.00	\$507.00	\$3,393.00	
1736408	9780358002444	Into Reading Rigby Guided Reading Benchmark Assessment Kit Primary Grades K-2	\$40.95	13	\$532.35	\$69.16	\$463.19	
s	tudent Materials							
1739675	9780358029496	Into Reading Know It Show It 3 Year Print Grade K	\$33.25	190	\$6,317.50	\$820.80	\$5,496.70	
1739626	9780358029007	Into Reading Writer's Notebook 3 Year Print Grade K	\$33.25	190	\$6,317.50	\$820.80	\$5,496.70	
т	otal for A la Car	te Items Available for Purchase	\$37,694.86					

Total for Grade K

\$51,084.16

Attention: Melinda Brooke mbrooks@rockypoint.k12.ny.us

Expiration Date: 9/30/2020

	ISBN	Title	Pri	ice Q		alue of all ' Materials	Value of Free Materials	Value of Charged Materials
S	<u>Grade 1</u> tudent Print & Di	gital Licenses						
1789486	9780358399650	Into Reading Student License Print/Digital 3 Year Grade 1	\$81.00	190	\$15,390.00	0 \$2,000.7	'0 \$13,389.30	ı
	Print Grade 1 Digital Stud	g Student myBook Softcover Set 3 Year ent Resources 3 Year Digital Grade K-6 tion Success						
		3619 iREAD 1 Year Online Student Access						
Т	otal for Student i	Print & Digital Licenses	\$13,389.3	0				
T	eacher Digital Li	censes						
1790235	9780358405658	Into Reading Digital Teacher Resources 3 Year Grades K-6	\$270.00	16	\$4,320.00	\$4,320.0	00	
Т	otal for Teacher	Digital Licenses						
A	la Carte Items A	vailable for Purchase						
if	Read							
S	tudent Licenses							
1747072	9780358091783	2020 Into Reading IRead Student Online 3 Year Grades K-2	\$30.00	45	\$1,350.00	0 \$175.5	0 \$1,174.50	
т	eacher Licenses							
1747445	9780358091813	2020 Into Reading IRead Teacher Online 3 Year Grades K-2	\$360.00	14	\$5,040.00	0 \$5,040.	00	
T	eacher Materiais							
1770960	9780358255048	Into Reading Rigby Guided Reading Coaching Cards Grade K-2	\$71.45	14	\$1,000.3	0	\$1,000.30	ı
1714678	9781328468970	2020 Into Reading Writing Workshop Teacher's Guide Grade 1	\$42.00	14	\$588.00	\$76.4	4 \$511.56	
1737701	9780358011101	2020 Into Reading Teacher's Guide Set Grade 1	\$140.00	15	\$2,100.0	0 \$273.0	90 \$1,827.00	•
1738603	9780358019060	Into Reading Teaching Pal Set Grade 1	\$28.00	15	\$420.00	\$54.6	0 \$365.40	
1715014	9781328476586	Into Reading Bookstix Grade 1	\$2.99	14	\$41.86	\$5.46	\$36.40	
1716735	9781328491619	Into Reading Tabletop Minilessons English Language Development Grade 1	\$31.00	1	\$31.00	\$4.03	\$26.97	
1721084	9781328522917	Into Reading Tabletop Minilessons Reading Grade 1	\$31.00	18	\$558.00	\$72.5	4 \$485.46	
1736147	9781328639097	Into Reading Big Book Set Grade 1	\$84.00	14	\$1,176.0	00 \$152.8	38 \$1,023.12	2
1742472	9780358056294	Into Reading Instructional Card Kit Grade 1	\$73.02	14	\$1,022.2	8 \$132.8	36 \$8 89.42	

Attention: Melinda Brooke mbrooks@rockypoint.k12.ny.us

Expiration Date: 9/30/2020

	ISBN	Title	Price	Quantity		of all orials	Value of Free Materials	Value of Charged Materials
1736145	9781328639059	Into Reading Read Aloud Set Grade 1	\$88.00	14	\$1,232.00	\$160.1	6 \$1,071.84	
1736278	9780358001515	Into Reading Rigby Leveled Library with Take and Teach Lessons Grade 1	\$1,000.00	14	\$14,000.00	\$1,820.	00 \$12,180.00	
1738478	9780358019848	Into Reading Start Right Reader Set of 6 Grade 1	\$259.20	14	\$3,628.80	\$471.8	0 \$3,157.00	
1728821	9781328581679	Into Reading Guiding Principles and Strategies Grades 1-2	\$10.41	14	\$145.74	\$18.9	3126.84	
1718497	9781328502520	Into Reading Teacher Resource Book Grade 1	\$14.00	14	\$196.00	\$25.4	8 \$170.52	
1737708	9780358011170	Into Reading Trade Classroom Library Set of 6 with Take and Teach Lessons Grade 1	\$155.30	14	\$2,174.20	\$282.6	66 \$1,891.54	
1736408	9780358002444	Into Reading Rigby Guided Reading Benchmark Assessment Kit Primary Grades K-2	\$40.95	14	\$573.30	\$74.4	8 \$498.82	
s	tudent Materials							
1775834	9780358293903	Into Reading Grammar Practice Workbook 3 Year Print Grade 1	\$33.25	190	\$6,317.50	\$820.8	\$5,496.70	
1739676	9780358029502	Into Reading Know It Show It 3 Year Print Grade 1	\$33.25	190	\$6,317.50	\$820.8	\$5,496.70	
1739627	9780358029014	Into Reading Writer's Notebook 3 Year Print Grade 1	\$33.25	190	\$6,317.50	\$820.8	\$5, 496.70	
1775892	9780358294481	Into Reading Read and Respond Journal 3 Year Print Grade 1	\$33.25	140	\$4,655.00	\$604.8	30 \$4,050.20	
Т	otal for A la Car	te Items Available for Purchase	\$46,976.99					

Total for Grade 1 \$60,366.29

> Attention: Melinda Brooke mbrooks@rockypoint.k12.ny.us

Proposal for								
Rocky	Point	Union	Free	SD				

	ISBN		Title	Price	Quantit		e of all V erials	alue of Free Materials	Value of Charged Materials
S	<u>Grade 2</u> student Print & Di	gital Licenses -							
1789489	9780358399681	Into Reading Student License Print/Dig Year Grade 2	gital 3	\$81.00	214	\$17,334.00	\$2,253.4	2 \$15,080.58	
	Print Grade 2 Digital Stud	g Student myBook Softcover Set 3 Yea ent Resources 3 Year Digital Grade K- titon Success							
	978035809 Gratis for New Qu	3619 iREAD 1 Year Online Student Aca alified Customers	cess						
ī	otal for Student	Print & Digital Licenses		\$15,080.58					
T	eacher Digital Li	censes							
1790235	9780358405658	Into Reading Digital Teacher Resourc Year Grades K-6	es 3	\$270.00	15	\$4,050.00	\$4,050.0	0	
T	otal for Teacher	Digital Licenses							
,	A la Carte Items A	wailable for Purchase							
i	Read								
\$	Student Licenses								
1747072	9780358091783	2020 Into Reading IRead Student Onl Year Grades K-2	line 3	\$30.00	45	\$1,350.00	\$175.50	\$1,174.50	
1	Teacher Licenses	;							
1747445	9780358091813	2020 Into Reading IRead Teacher Or Year Grades K-2	aline 3	\$360.00	14	\$5,040.00	\$5,040.0	00	
-	Teacher Materials	.							
1770960	9780358255048	Into Reading Rigby Guided Reading Coaching Cards Grade K-2		\$71.45	13	\$928.85		\$928.85	
1714679	9781328469809	2020 Into Reading Writing Workshop Teacher's Guide Grade 2		\$42.00	13	\$546.00	\$70.98	\$475.02	
1737702	9780358011118	2020 Into Reading Teacher's Guide S Grade 2	Set	\$140.00	14	\$1,960.00	\$254.8	\$1,705.20	
1738605	9780358019077	Into Reading Teaching Pal Set Grade	2	\$28.00	14	\$392.00	\$50.96	\$341.04	
1715021	9781328476593	Into Reading Bookstix Grade 2		\$2.99	13	\$38.87	\$5.07	\$33.80	
1716736	9781328491626	Into Reading Tabletop Minilessons E Language Development Grade 2	nglish	\$31.00	1	\$31.00	\$4.03	\$26.97	
1721085	9781328522924	Into Reading Tabletop Minilessons R Grade 2	eading	\$31.00	18	\$558.00	\$72.54	\$485.46	
1742513	9780358056300	Into Reading Instructional Card Kit G	rade 2	\$75.02	13	\$975.26	\$126.7	5 \$848.51	
1736146	9781328639080	Into Reading Read Aloud Set Grade	2	\$132.00	13	\$1,716.00	\$223.0	8 \$1,492.92	

Attention: Melinda Brooke mbrooks@rockypoint.k12.ny.us Customer Experience
9400 South Park Center Loop
Orlando, FL 32819
FAX: 800-269-5232
k12orders@hmhco.com
Please submit this form with your purchase order

Expiration Date: 9/30/2020

Coupon Code: PRODPB13

B13 HMH Confidential and Proprietary
Sold:0000189869 Ship:0000189869 Page 6 of 16

Proposal for **Rocky Point Union Free SD**

	ISBN	Title	Price	Quan			ue of Free laterials	Value of Charged Materials
1736279	9780358001522	Into Reading Rigby Leveled Library with Take and Teach Lessons Grade 2	\$1,000.00	13	\$13,000.00	\$1,690.00	\$11,310.00	
1738479	9780358019855	Into Reading Start Right Reader Set of 6 Grade 2	\$172.80	13	\$2,246.40	\$291.98	\$1,954.42	
1728821	9781328581679	Into Reading Guiding Principles and Strategies Grades 1-2	\$10.41	13	\$135.33	\$17.55	\$117.78	
1718498	9781328502537	Into Reading Teacher Resource Book Grade 2	\$14.00	13	\$182.00	\$23.66	\$158,34	
1737709	9780358011187	Into Reading Trade Classroom Library Set of 6 with Take and Teach Lessons Grade 2	\$155.30	13	\$2,018.90	\$262.47	\$1,756.43	
1736408	9780358002444	Into Reading Rigby Guided Reading Benchmark Assessment Kit Primary Grades K-2	\$40.95	13	\$532.35	\$69.16	\$463.19	
S	tudent/ Materials	3						
1775835	9780358293910	Into Reading Grammar Practice Workbook 3 Year Print Grade 2	\$33.25	214	\$7,115.50	\$924.48	\$6,191.02	
1739677	9780358029519	Into Reading Know It Show It 3 Year Print Grade 2	\$33.25	214	\$7,115.50	\$924.48	\$6,191.02	
1739628	9780358029021	Into Reading Writer's Notebook 3 Year Print Grade 2	\$33.25	214	\$7,115.50	\$924.48	\$6,191.02	
1775893	9780358294498	Into Reading Read and Respond Journal 3 Year Print Grade 2	\$33.25	130	\$4,322.50	\$561.60	\$3,760.90	

\$45,606.39

Total for Grade 2 \$60,686.97

Total for A la Carte Items Available for Purchase

Attention: Melinda Brooke mbrooks@rockypoint.k12.ny.us Customer Experience 9400 South Park Center Loop Orlando, FL 32819 FAX: 800-269-5232

Expiration Date: 9/30/2020

Proposal for **Rocky Point Union Free SD**

Value of Value of all Value of Free Charged ISBN Title Price Quantity Materials Materials Materials Grade 3 **Student Print & Digital Licenses** Into Reading Student License Print/Digital 3 \$15,795.00 \$2.053.35 1789492 9780358399711 \$81.00 195 \$13 741 65 Year Grade 3 Includes: Into Reading Student myBook Softcover Set 3 Year Print Grade 3 Digital Student Resources 3 Year Digital Grade K-6 Implementation Success **Total for Student Print & Digital Licenses** \$13,741.65 **Teacher Digital Licenses** 1790235 9780358405658 Into Reading Digital Teacher Resources 3 \$270.00 15 \$4,050,00 \$4,050.00 Year Grades K-6 **Total for Teacher Digital Licenses** A la Carte Items Available for Purchase **Teacher Materials** Into Reading Rigby Guided Reading \$703.30 1770961 9780358255055 \$54.10 13 \$703.30 Coaching Cards Grade 3-6 1714680 9781328469816 2020 Into Reading Writing Workshop \$42.00 13 \$546.00 \$70.98 \$475.02 Teacher's Guide Grade 3 1737703 9780358011125 2020 Into Reading Teacher's Guide Set \$140.00 \$1,960.00 \$254.80 \$1,705.20 14 Grade 3 9780358019084 Into Reading Teaching Pal Set Grade 3 1738606 \$392.00 \$50.96 \$341.04 \$28.00 14 1716737 9781328491633 Into Reading Tabletop Minilessons English \$31.00 \$31.00 \$4.03 \$26.97 Language Development Grade 3 1721086 9781328522931 Into Reading Tabletop Minilessons Reading \$31.00 17 \$527.00 \$68.51 \$458.49 1736280 9780358001539 Into Reading Rigby Leveled Library with \$1,000.00 \$13,000.00 \$1,690.00 \$11,310.00 13 Take and Teach Lessons Grade 3 1728822 9781328581686 Into Reading Guiding Principles and \$10.41 13 \$135.33 \$17.55 \$117.78 Strategies Grades 3-5 \$182.00 \$158.34 1718499 9781328502544 Into Reading Teacher Resource Book \$14.00 13 \$23.66 1714235 9781328473967 Into Reading Vocabulary Cards Grade 3 \$191.75 \$166.79 \$14.75 13 \$24.96 1737710 9780358011194 Into Reading Trade Classroom Library Set \$155.30 13 \$2,018,90 \$262.47 \$1,756,43

Student Materials

1736409 9780358002451

Attention: Melinda Brooke mbrooks@rockypoint.k12.ny.us

\$45.16

Customer Experience 9400 South Park Center Loop Orlando, FL 32819 FAX: 800-269-5232

\$76.31

\$510.77

Expiration Date: 9/30/2020

Coupon Code: PRODPB13

HMH Confidential and Proprietary

k12orders@hmhco.com

Grades 3-5

of 6 with Take and Teach Lessons Grade 3

Into Reading Rigby Guided Reading

Benchmark Assessment Kit Intermediate

\$587.08

13

Proposal for Rocky Point Union Free SD

Value of Charged Materials Value of all Value of Free ISBN Title Price Quantity Materials Materials Into Reading Grammar Practice Workbook 3 Year Print Grade 3 1775836 9780358293927 \$33.25 195 \$6,483.75 \$842.40 \$5,641,35 Into Reading Know It Show It 3 Year Print 1739678 9780358029526 \$33.25 195 \$6,483.75 \$842.40 \$5,641.35 Grade 3 1739629 9780358029038 Into Reading Writer's Notebook 3 Year Print **\$3**3.25 195 \$6,483.75 \$842.40 \$5,641.35 Grade 3 Into Reading Read and Respond Journal 3 Year Print Grade 3 1775894 9780358294504 \$3,760.90 \$33.25 130 \$4,322.50 \$561.60 Total for A la Carte Items Available for Purchase \$38,415.08

<u>Total for Grade 3</u> \$52,156.73

Attention:
Melinda Brooke
mbrooks@rockypoint.k12.ny.us

Customer Experience 9400 South Park Center Loop Orlando, FL 32819 FAX: 800-269-5232

Expiration Date: 9/30/2020

Expiration Date: 9/30/2020

	ISBN	Title	Price	Quantity	Value / Mate		/alue of Free Materials	Value of Charged Materials	
Si	Grade 4 tudent Print & Di	gital Licenses							
1789495	Includes: Into Reading Print Grade 4 Digital Stude	Into Reading Student License Print/Digital 3 Year Grade 4 g Student myBook Softcover Set 3 Year ent Resources 3 Year Digital Grade K-6 tion Success	\$81.00	221	\$17,901.00	\$2,327.1	3 \$15,573.87		
T	otal for Student F	Print & Digital Licenses	\$15,573.87						
T	eacher Digital Lic	censes							
1790235	9780358405658	Into Reading Digital Teacher Resources 3 Year Grades K-6	\$270.00	14	\$3,780.00	\$3,780.0	00		
T	otal for Teacher	Digital Licenses							
A	A la Carte Items Available for Purchase								
Т	eacher Materials								
1770961	9780358255055	Into Reading Rigby Guided Reading Coaching Cards Grade 3-6	\$54.10	12	\$649.20		\$649.20		
1714681	9781328469823	2020 Into Reading Writing Workshop Teacher's Guide Grade 4	\$42.00	12	\$504.00	\$65.52	\$438.48		
1737704	9780358011132	2020 Into Reading Teacher's Guide Set Grade 4	\$140.00	13	\$1,820.00	\$236.6	0 \$1,583.40		
1738607	9780358019091	Into Reading Teaching Pal Set Grade 4	\$28.00	13	\$364.00	\$47.32	\$316.68		
1716738	9781328491640	Into Reading Tabletop Minilessons English Language Development Grade 4	\$31.00	1	\$31.00	\$4.03	\$26.97		
1721087	9781328522948	Into Reading Tabletop Minilessons Reading Grade 4	\$31.00	16	\$496.00	\$64.48	3 \$431.52		
1736281	9780358001546	Into Reading Rigby Leveled Library with Take and Teach Lessons Grade 4	\$1,000.00	12	\$12,000.00	\$1,560.	00 \$10,440.00	ı	
1728822	9781328581686	Into Reading Guiding Principles and Strategies Grades 3-5	\$10.41	12	\$124.92	\$16.20	\$108.72		
1718500	9781328502551	Into Reading Teacher Resource Book Grade 4	\$14.00	12	\$168.00	\$21.8	4 \$146.16		
1714236	9781328473974	Into Reading Vocabulary Cards Grade 4	\$14.75	12	\$177.00	\$23.0	4 \$153.96		
1737711	9780358011200	Into Reading Trade Classroom Library Set of 6 with Take and Teach Lessons Grade 4	\$155.30	12	\$1,863.60	\$242.2	8 \$1,621.32		
1736409	9780358002451	Into Reading Rigby Guided Reading Benchmark Assessment Kit Intermediate Grades 3-5	\$45.16	12	\$541.92	\$70.4	4 \$471.48		

Attention: Melinda Brooke mbrooks@rockypoint.k12.ny.us Customer Experience 9400 South Park Center Loop Orlando, FL 32819

Student Materials

Proposal for Rocky Point Union Free SD

Expiration Date: 9/30/2020

	ISBN	Title	Price	Qua	ntity	Value of all Materials	Value of Free Materials	Value of Charged Materials
1775837	9780358293934	Into Reading Grammar Practice Workbook 3 Year Print Grade 4	\$33.25	221	\$7,348.2	5 \$954	.72 \$6,393.53	
1739679	9780358029533	Into Reading Know It Show It 3 Year Print Grade 4	\$33.25	221	\$7,348 .2	5 \$954	.72 \$6,393.53	
1739630	9780358029045	Into Reading Writer's Notebook 3 Year Print Grade 4	\$33.25	221	\$7,348.2	5 \$954	.72 \$6,393.53	
1775895	9780358294511	Into Reading Read and Respond Journal 3 Year Print Grade 4	\$33.25	120	\$3,990.0	0 \$518	.40 \$3,471.60	
T	otal for A la Car	te Items Available for Purchase	\$39,040.08					
								_

Total for Grade 4

\$54,613.95

Attention: Melinda Brooke mbrooks@rockypoint.k12.ny.us Customer Experience
9400 South Park Center Loop
Orlando, FL 32819
FAX: 800-269-5232
k12orders@hmhco.com
Please submit this form with your purchase order

Proposal for Expiration Date: 9/30/2020 **Rocky Point Union Free SD**

	ISBN	Title	Price	Quan			ue of Free laterials	Value of Charged Materials
Si	Grade 5 tudent Print & D	igital Licenses						
1789498	9780358399773 Includes:	Into Reading Student License Print/Digital 3 Year Grade 5	\$81.00	211	\$17,091.00	\$2,221.83	\$14, 869.17	
	Into Readir Print Grade 5	g Student myBook Softcover Set 3 Year						
		lent Resources 3 Year Digital Grade K-6 ation Success						
Te	otal for Student	Print & Digital Licenses	\$14,869.17					
Te	eacher Digital Li	censes						
1790235	9780358405658	Into Reading Digital Teacher Resources 3 Year Grades K-6	\$270.00	14	\$3,780.00	\$3,780.00		
T	otal for Teacher	Digital Licenses						
A	la Carte Items A	vailable for Purchase						
T	eacher Materials							
1770961	9780358255055	Into Reading Rigby Guided Reading Coaching Cards Grade 3-6	\$54.10	12	\$649.20		\$649.20	
1714682	9781328469830	2020 Into Reading Writing Workshop Teacher's Guide Grade 5	\$42.00	12	\$504.00	\$65.52	\$438.48	
1737705	9780358011149	2020 Into Reading Teacher's Guide Set Grade 5	\$140.00	13	\$1,820.00	\$236.60	\$1,583.40	
1738608	9780358019107	Into Reading Teaching Pal Set Grade 5	\$28.00	13	\$364.00	\$47.32	\$316.68	
1716739	9781328491657	Into Reading Tabletop Minilessons English Language Development Grade 5	\$31.00	1	\$31.00	\$4.03	\$26.97	
1721088	9781328522955	Into Reading Tabletop Minilessons Reading Grade 5	\$31.00	16	\$496.00	\$64.48	\$431.52	
1736282	9780358001553	Into Reading Rigby Leveled Library with Take and Teach Lessons Grade 5	\$1,000.00	12	\$12,000.00	\$1,560.00	\$10,440.00	
1728822	9781328581686	Into Reading Guiding Principles and Strategies Grades 3-5	\$10.41	12	\$124.92	\$16.20	\$108.72	
1718501	9781328502568	Into Reading Teacher Resource Book Grade 5	\$14.00	12	\$168.00	\$21.84	\$146.16	
1714237	9781328473981	Into Reading Vocabulary Cards Grade 5	\$14.75	12	\$177.00	\$23.04	\$153.96	
1737712	9780358011217	Into Reading Trade Classroom Library Set of 6 with Take and Teach Lessons Grade 5	\$155.30	12	\$1,863.60	\$242.28	\$1,621.32	
1736409	9780358002451	Into Reading Rigby Guided Reading Benchmark Assessment Kit Intermediate Grades 3-5	\$45.16	12	\$541.92	\$70.44	\$471.48	

Student Materials

Attention: Melinda Brooke mbrooks@rockypoint.k12.ny.us

Customer Experience 9400 South Park Center Loop Orlando, FL 32819 FAX: 800-269-5232

Coupon Code: PRODPB13

HMH Confidential and Proprietary
89869 Page 12 of 16

Proposal for Rocky Point Union Free SD

	ISBN	Title	Price	Quant		Value of all Materials	Value of Free Materials	Value of Charged Materials
1775838	9780358293941	Into Reading Grammar Practice Workbook 3 Year Print Grade 5	\$33.25	211	\$7,015.	75 \$911.	52 \$6,104	.23
1739680	9780358029540	Into Reading Know It Show It 3 Year Print Grade 5	\$33.25	211	\$7,015.	75 \$911.	.52 \$6,104	.23
1739631	9780358029052	Into Reading Writer's Notebook 3 Year Print Grade 5	\$33.25	211	\$7,015.	.75 \$911	.52 \$6,104	.23
1775896	9780358294528	Into Reading Read and Respond Journal 3 Year Print Grade 5	\$33.25	120	\$3,990	.00 \$518	.40 \$3,471	.60
т	otal for A la Carl	te Items Available for Purchase	\$38,172.18					

Total for Grade 5

\$53,041.35

Attention: Melinda Brooke mbrooks@rockypoint.k12.ny.us

Customer Experience 9400 South Park Center Loop Orlando, FL 32819 FAX: 800-269-5232

Expiration Date: 9/30/2020

Proposal for Rocky Point Union Free SD

Expiration Date: 9/30/2020

Value of Value of Free Value of all Charged Materials ISBN Title Quantity Materials Materials Price <u>Professional Services</u> Getting Started with Into Reading 1730393 9781328593979 Into Reading Getting Started Full Day Grade \$2,800.00 \$0.00 \$0.00 K-6 Participants engage in a variety of hands-on experiences to learn about the organization, design, and resources of Into Reading. The goal is to build deeper understanding and confidence to begin implementing Into Reading in their respective learning environments.

Total for Professional Services

\$0.00

Attention: Melinda Brooke mbrooks@rockypoint.k12.ny.us

Proposal for **Rocky Point Union Free SD**

Expiration Date: 9/30/2020

ISBN

Title

Price

Quantity

\$0.00

Value of all Materials

Value of Free Materials

Value of Charged Materials

Subtotal Purchase Amount: \$331,949.45 Shipping & Handling: Total Cost of Proposal (PO Amount): \$331,949.45

Please add proper sales tax to your order

Attention: Melinda Brooke mbrooks@rockypoint.k12.ny.us

Customer Experience 9400 South Park Center Loop Orlando, FL 32819 FAX: 800-269-5232 k12orders@hmhco.com

Proposal for Rocky Point Union Free SD

Total Cost of Proposal (PO Amount): \$331.949.45

Thank you for considering HMH as your partner. We are committed to providing an excellent experience and delivering ongoing, high-quality service to our customers. To meet these goals, we want to ensure you are aware of the below Terms of Purchase. These terms help us process your order quickly, efficiently, and accurately, ensuring successful delivery and implementation of our solutions.

- Please return this cost proposal with your signed purchase order that matches product, prices and shipping charges.
- Provide the exact address for *delivery* of print materials. The shipping address may be your district warehouse or individual school sites, but it is essential that this is accurate.
- Please supply the name of each important district point of contact for all aspects of the solution including their direct contact information (email/phone):
 - o Point of Contact for Print materials
 - o Point of Contact for Digital materials
 - o Point of Contact for Scheduling Professional Development
- Please confirm that we have the correct 'Ship to' and 'Sold to' information on the cost proposal.

Ship to: Sold to:

Rocky Point Union Free SD
90 Rocky Point Yaphank Rd
Rocky Point, NY 11778-8423
Rocky Point, NY 11778-8423
Rocky Point, NY 11778-8423

- Please provide funding start and end dates.
 - Please note that all products and services will be billed upon the processing of your purchase order.
- Our payment terms are 30 days from the invoice date.
- Print subscription material quantities may be adjusted across grades for like products, to accommodate enrollment fluctuations, quantities cannot be adjusted between different programs or copyrights.
- Our shipping terms are FOB shipping point. The shipping term for your proposal is Shipping Point.
- Should any of these Terms of Sale conflict with any preprinted terms on your purchase order, the HMH terms of service shall apply.

Thank you in advance for supplying us with the necessary information at time of purchase.

Our goal is to ensure your success throughout the duration of this agreement, which starts with a highly successful delivery of our solution.

For greater detail, the complete Terms of Purchase may be reviewed here: http://www.hmhco.com/common/terms-conditions

Date of Proposal: 2/7/2020 Proposal Expiration Date: 9/30/2020



Houghton Mifflin Harcourt

Attention: Melinda Brooke mbrooks@rockypoint.k12.ny.us Customer Experience 9400 South Park Center Loop Orlando, FL 32819 FAX: 800-269-5232 k12orders@hmhco.com

Expiration Date: 9/30/2020



Houghton Mifflin Harcourt

Proposal Prepared For Rocky Point Union Free SD

Attention:
Melinda Brooks
mbrooks@rockypoint.k12.ny.us

For the Purchase of:

Into Literature 2022 - Print/Digital 6 Year - Grades 7-8

Prepared By Heather Herrero heather.herrero@hmhco.com

Please submit this proposal with your purchase order.

Purchase orders or duly executed service agreements for Professional Services purchased, must be submitted at least 30 days before the service event date.

Attention:
Melinda Brooks
mbrooks@rockypoint.k12.ny.us

Customer Experience 9400 South Park Center Loop Orlando, FL 32819 FAX: 800-269-5232 k12orders@hmhco.com Date of Proposal: 3/26/2021

R

Proposal for	Expiration Date: 9/30/2021
Rocky Point Union Free SD	

ISE	BN	Title	Price	Quantity	Value of all Materials	Value of Free Materials	Value of Charged Materials
s	<u>Grade 7</u> tudent Digital Li	censes					
1810770	9780358574637 tncludes: Digital Student Re Implementation S	Into Literature Student License Digital 6 Year Grade 6-8 asources 6 Year Grades 6-8 uccess	\$96.00	210	\$20,160.00	\$3,024.00	\$17,136.00
Т	otal for Student	Digital Licenses	\$17,136.00				
T	eacher Digital L	Icenses					
1809709	9780358565901	Into Literature Teacher License Digital with Teacher's Corner 6 Year Grades 6-8	\$450.00	3	\$1,350.00	\$1,350.00	
	Includes: Into Literature Digital Teacher Resources 6 Year Grades 6-8 Access to Teacher's Corner						
T	otal for Teacher	Digital Licenses					
A	la Carte Items A	Available for Purchase					
S	tudent Materials						
1805869	9780358538370	tnto Literature Softcover Student Edition 6 Year Print Grade 7	\$48.00	210	\$10,080.00	\$1,512.00	\$8,568.00
1793807	9780358436041 Recommended fo	Language Arts Novel 3 Points ra range of titles and choices from the HMH Novel List.	\$12.00	210	\$2,520.00	\$378.00	\$2,142.00
T	otal for A la Cart	te Items Available for Purchase	\$10,710.00				

Total for Grade 7 \$27,846.00

Attention: Customer Experience
Melinda Brooks 9400 South Park Center Loop
mbrooks@rockypoint.k12.ny.us Orlando, FL 32819
FAX: 800-269-5232
HMH Confidential and Proprietary k12orders@hmhco.com
89869 Page 2 of 6 Please submit this form with your purchase order

Expiration Date: 9/30/2021

ISE	зм	Title	Price	Quantity	Value of all Materials	Value of Free Materials	Value of Charged Materials
s	Grade 8 Student Digital L	icenses					
1810770	Includes:	Into Literature Student License Digital 6 Year Grade 6-8 esources 6 Year Grades 6-8 uccess	\$96.00	210	\$20,160.00	\$3,024.00	\$17,136.00
т	otal for Student	Digital Licenses	\$17,136.00				
Т	eacher Digital L	icenses					
1809709	Access to Teache		\$450.00	3	\$1,350.00	\$1,350.00	
		Digital Licenses					
		Available for Purchase					
To	eacher Materials	•					
1793953	9780358436942	Into Literature Program Guide Grades 6-8	\$30.00	1	\$30.00	\$4.50	\$25.50
Si	tudent Materials						
1805870	9780358538387	Into Literature Softcover Student Edition 6 Year Print Grade 8	\$48.00	210	\$10,080.00	\$1,512.00	\$8,568.00
1793807	9780358436041 Recommended fo	Language Arts Novel 3 Points ra range of titles and choices from the HMH Novel List.	\$12.00	210	\$2,520.00	\$378.00	\$2,142.00
To	otal for A la Cart	e Items Available for Purchase	\$10,735.50				
Total fo	or Grade 8		\$27,871.50		·		· · · · · · · · · · · · · · · · · · ·

Attention: Melinda Brooks mbrooks@rockypoint.k12.ny.us

Date of Proposal: 3/26/2021

Proposal for **Rocky Point Union Free SD**

Expiration Date: 9/30/2021

ISE	BN	Title	Price	Quantity	Value of all Materials	Value of Free Materials	Value of Charged Materials
In	Professiona nplementation S						
1810630	preparing teacher in a variety of inte resources of Into I	2022 Into Literature Getting Started Live Online Version 2 2 Hour Grades 6-12 Id live online session is streamlined to focus on for their first weeks of instruction. Participants engage ractive experiences to learn about the organization and Literature. The goal is to build confidence and prepare ing start with Into Literature.		1	\$800.00	\$800.00	

Total for Professional Services

\$0.00

Attention: Melinda Brooks mbrooks@rockypoint.k12.ny.us

Date of Proposal: 3/26/2021

Proposal for Rocky Point Union Free SD

Expiration Date: 9/30/2021

ISBN

Title

Price

Quantity

Value of all Materials

Value of Free Materials

Value of Charged Materials

Total Savings:	\$12,532.50
Subtotal Purchase Amount:	\$55,717.50
Shipping & Handling:	\$1,801.96
Total Cost of Proposal (PO	\$57,519.46

Amount):

Please add proper sales tax to your order

Attention: Melinda Brooks mbrooks@rockypoint.k12.ny.us

Expiration Date: 9/30/2021

Total Cost of Proposal (PO Amount): \$57,519.46

Thank you for considering HMH as your partner. We are committed to providing an excellent experience and delivering ongoing, high-quality service to our customers. To meet these goals, we want to ensure you are aware of the below Terms of Purchase. These terms help us process your order quickly, efficiently, and accurately, ensuring successful delivery and implementation of our solutions.

- · Please return this cost proposal with your signed purchase order that matches product, prices and shipping charges.
- Provide the exact address for *delivery* of print materials. The shipping address may be your district warehouse or individual school sites, but it is essential that this is accurate.
- Please supply the name of each important district point of contact for all aspects of the solution including their direct contact information (email/phone):
 - o Point of Contact for Print materials
 - o Point of Contact for Digital materials
 - o Point of Contact for Scheduling Professional Development
- · Please confirm that we have the correct 'Ship to' and 'Sold to' information on the cost proposal.

Ship to:

Sold to:

Rocky Point Union Free SD 90 Rocky Point Yaphank Rd Rocky Point, NY 11778-8423

Rocky Point Union Free SD 90 Rocky Point Yaphank Rd Rocky Point, NY 11778-8423

- Please provide funding start and end dates.
- · Please note that all products and services will be billed upon the processing of your purchase order.
- Our payment terms are 30 days from the invoice date.
- · Print subscription material quantities may be adjusted across grades for like products, to accommodate enrollment fluctuations, quantities cannot be adjusted between different programs or copyrights.
- Our shipping terms are FOB shipping point. The shipping term for your proposal is Shipping Point.
- Should any of these Terms of Sale conflict with any preprinted terms on your purchase order, the HMH terms of service shall apply.

Thank you in advance for supplying us with the necessary information at time of purchase.

Our goal is to ensure your success throughout the duration of this agreement, which starts with a highly successful delivery of our solution.

For greater detail, the complete Terms of Purchase may be reviewed here: http://www.hmhco.com/common/terms-conditions

Date of Proposal: 3/26/2021 Proposal Expiration Date: 9/30/2021



Houghton Mifflin Harcourt

Attention:
Melinda Brooks
mbrooks@rockypoint.k12.ny.us

Customer Experience 9400 South Park Center Loop Orlando, FL 32819 FAX: 800-269-5232 k12orders@hmhco.com

Coupon Code: PRODPB15

HMH Confidential and Proprietary

Please submit this form with your purchase order

March 9, 2021

Ms. Kristen White Executive Director of Pupil Personnel Services Rocky Point Union Free School District 90 Rocky Point-Yaphank Road Rocky Point, NY 11778

Dear Ms. White:

I hope that during this time of great challenges that you and your district staff are well and staying safe. The entire education community has been impacted and most significantly the special education community. CEO has been impacted as well with COVID related issues, but CEO has made the transformation toward recovery and look forward to continuing to work with you and your district.

Enclosed is the contract and rate sheets for the programs that CEO proposed to Rocky Point Union Free School District for the school year 2021-2022.

- Rates for individual transition and vocational services.
- Rates for groups in life skills programs.
- Rates for School Business Partnerships, Specialty Programs and Career Lab.
- Rates for groups in life skills programs for the summer.

I would like to thank the Rocky Point Union Free School District for using CEO to provide transition support services to their students and we hope the contract meets with your approval. Feel free to contact me at (631) 234-6064 or at NVillani@CEOincworks.com if you have any further questions.

Sincerely,

Nicholas A. Villani, President/CEO Career and Employment Options, Inc.

Contract for Services

SCHOOL DISTRICT CONSULTANT SERVICES CONTRACT for

CAREER & EMPLOYMENT OPTIONS, INC.

THIS AGREEMENT is entered into this day of, 20 by the Board of Education of the (hereinafter "District"), and Career & Employment Options
CEO, Inc., located at 1 Rabro Drive Suite 102, Hauppauge NY 11788 (hereinafter "Consultant").
TERM:
This AGREEMENT shall commence on <u>July 1, 2021</u> , and continue thereafter in full force and effect through the period ending <u>June 30, 2022</u> , unless terminated as hereinafter specified in this AGREEMENT.
<u>CONDITIONS</u> :

In performing services specified in this AGREEMENT, it is understood that:

- 1. Consultant will be engaged as an independent Contractor and therefore be solely responsible for the payment of federal and state income taxes applicable to this AGREEMENT.
- 2. Consultant will not be eligible for any employee benefits whatsoever relative to this contract including, but not limited to, social security, New York State Worker's Compensation, unemployment insurance, New York State Employee's Retirement System, health or dental insurance, or malpractice insurance, or the like.
- 3. District, if required by Federal or State requirements, will submit a Form 1099 and IT 2102.1 respectively at year-end to the Federal Government for all individuals having a gross income exceeding \$600, which thereupon will be reported for income tax purposes.
- 4. This contract, and any amendments to this contract, will not be in effect until approved by District.
- 5. District reserves the right to reject any of the Consultant's staff, which District, at its sole but reasonable discretion, may deem unqualified.

SERVICES AND RESPONSIBILITIES:

1. During the term of this AGREEMENT, Consultant will provide the District with the services set forth in the attached Schedule of Work and Fees.

- 2. Consultant shall provide conscientious, competent and diligent services throughout the entire term of this AGREEMENT.
- 3. Consultant will provide on-site services within the District.
- Consultant shall perform such services in accordance with established and acceptable requirements of the State Education Department.
- 5. Consultant shall provide services and maintain records, logs and reports including, but not limited to, those pertaining to confidentiality of student records, in accordance with all applicable laws, regulations, requirements of the New York State Education Department or Health Department and school district policies and procedures in force during the term of this AGREEMENT. All students' records, logs, etc., will be the property of District and will be considered as mandated records. Consultant shall observe and comply with all District Policies and Regulations while on the grounds of the District or providing services under this Agreement.
- 6. See Addendum A, B, C, and D.

REPRESENTATIONS:

Consultant represents that its officers, employees and agents are professionals of good character, who are in good professional standing and who possesses current and valid license, if any, necessary to perform the services under this AGREEMENT. Consultant represents that its officers, employees and agents are not currently charged, nor in the past has been charged with any criminal or professional misconduct or incompetence. Consultant shall provide copies of licenses of all professionals servicing the District upon the execution of this AGREEMENT.

In the event that the license of Consultant or any officer, agent or employee thereof is revoked, terminated, suspended, or otherwise impaired, or if any litigation becomes pending against Consultant, or in the event that Consultant receives notice of such impending action, Consultant shall immediately notify District through the Superintendent of Schools.

COMPENSATION:

District agrees to pay Consultant the fees indicated on the attached Schedule of Work and Fees, following presentation of detailed, written, invoices and approval by the Board of Education.

INSURANCE:

Consultant, at his sole expense, shall procure and maintain such policies of comprehensive general liability, malpractice and other insurance as shall be necessary to insure the District as additional insured, against any claim for liability, personal injury, or death occasioned directly or indirectly by Consultant in connection with the performance of Consultant's responsibilities under this AGREEMENT; each such policy shall provide a minimum coverage of One Million (\$1,000,000.00) Dollars in the event of injury or death to one person, and Three Million (\$3,000,000.00) Dollars in the event of injury or death to more than one person as the result of the same incident. Upon the execution of this AGREEMENT, Consultant will supply District with a copy of said policy.

INDEMNIFICATION

Career and Employment Options, Inc. represents and warrants that it, nor its employees or contractors, are not excluded from participation, and is not otherwise ineligible to participate, in a "federal health care program" as defined in 42 U.S.C. § 1320a-7b(f) or in any other government payment program.

In the event Career and Employment Options, Inc or one of its employees or contractors, is excluded from participation, or becomes otherwise ineligible to participate in any such program during the Term, Career and Employment Options will notify the District, in writing, within three (3) days after such event. Upon the occurrence of such event, whether or not on such notice is given to Career and Employment Options, Inc, the District reserves the right to immediately cease contracting with Career and Employment Options, Inc.

If Career and Employment Options, Inc is an Employment Agency, Career and Employment Options, Inc represents and warrants that its employees and contractors are not excluded from participation in a "federal health care program" as defined in 42 U.S.C. § 1320a-7b(f) or debarred from participation in any federal or other program.

Career and Employment Options, Inc. further represents and warrants it will, at a minimum, check monthly all of its employees and subcontractors against:

- The General Services Administration's Federal Excluded Party List System (or any successor system),
- The United States Department of Health and Human Service's Office of the Inspector General's Lists of Excluded Individuals and Entities or any successor list,
- The New York State Department of Health's Office of the Medicaid Inspector General's list of Restricted, Terminated or Excluded Individuals or Entities.

In the event an excluded party is discovered Career and Employment Options, Inc. will notify the District in writing within three (3) days after such event.

Upon the occurrence of such event, whether or not such notice is given to Career and Employment Options, the District reserves the right to immediately cease contracting with Career and Employment Options.

Consultant and District shall defend, indemnify and hold harmless one another and their officers, directors, employees and agents from and against any and all claims, liabilities, losses, damages, costs or expenses of any kind, including reasonable attorney's fees and disbursements, incurred as a result of or arising out of and relating to any acts or omissions of the other party's officers, directors, employees or agents relating to the services provided pursuant to this AGREEMENT.

DEFAULT AND TERMINATION:

Either Consultant or District may terminate this AGREEMENT upon thirty (30) days prior written notification to the other party. Such notice shall be deemed to have been given, if delivered personally or sent by registered or certified mail, addressed as follows:

To District:	Rocky Point Union Free School District 90 Rocky Point-Yaphank Road Rocky Point, NY 11778			
To Consultant:	Career & Employment Options, Inc. (CEO, Inc.) Nicholas A. Villani, President/CEO 1 Rabro Drive Suite 102 Hauppauge, N.Y. 11788			
In the event the consultant or District terminates this AGREEMENT upon thirty (30) days written notice, with or without cause, Consultant shall not be liable to the District for further services, and the District shall only be liable to Consultant to those amounts invoiced for services performed by Consultant.				
The parties agree that Consultant's failure to comply with any terms or conditions of this AGREEMENT will be deemed a material breach of contract.				
<u>SUCCESSORS AND ASSIGNS:</u> It is expressly understood that this AGREEMENT shall not be assigned without prior written consent of the other party.				
ENTIRE AGREEMENT:				
This AGREEMENT is the complete and exclusive statement of the AGREEMENT between the parties, and supersedes all prior contemporaneous proposals, oral or written, understandings, representations, conditions or covenants between the parties relating to the subject matter of the AGREEMENT.				
This AGREEMENT may not be changed orally, but only by an AGREEMENT, in writing, signed by the parties hereto.				
WHEREFORE, the parties h	nave set their hands and seals this day of, 20			
	$M \cap M \setminus M$			

School District Personnel

Nicholas A. Villani, President/CEO

Career and Employment Options, Inc.

Career & Employment Options. 1 Rabro Drive Hauppauge, N.Y. 11788 Phone (631) 234-6064 Fax (631) 234-6081 www.ceoincworks.com

Rocky Point Union Free School District Addendum A including Remote Learning 2021-2022 Rate Sheet

Group Format Services: CEO provides services to groups within district which significantly lowers the price per student. The pricing is based upon:

- Number of Students.
- Amount of hours per day.
- Level of activities requested.
- Number of students graduating that year.
- This pricing requires consultation prior to develop the program.

Job Coaching: \$65 per hour:

- Job coaching will be provided at a rate of \$65 per hour for both direct and indirect student services.
- Evaluation and criteria for student preference of employment or career choice will be performed.
 Available employment opportunities or internship options will be discussed and evaluated. Assessment and exploration or development of potential worksites, based upon evaluation material may be conducted. Any orientation services to the worksite and evaluation of the specific services required by the student to participate in workplace will be provided. The findings will be provided in written format. These would be considered both direct and indirect student services.
- Job development services including job/task analysis, determination of student interest, transportation strategies and career planning, crisis intervention and onsite advocacy will be provided as both direct and indirect student services. The findings will be provided in written format.
- Job coaching would include job placement services and on-site training. When the student is faded from intensive job coaching, the student will receive a follow up service. Follow up services will consist of identified service hours as per the IEP. The findings will be provided in written format.
- Indirect student service time includes the provision of student specific goals and objectives consistent with the student's IEP as well as <u>any communication including phone calls</u>, <u>letters or any electronic correspondence for the maintenance</u>, <u>record review</u> of the student specific accomplishments, efforts, and demonstrated need for additional instruction.
- These services can be administered remote using a multitude of platforms either by the choosing of the district or through the platform used by CEO.
- All services will have the same content but delivered through remote devices.

In-School Career Counseling: \$65 session.

- Focus upon CDOS related skills that follow the CEO curriculum "Career Services for Students In & Beyond Special Education". "Career Services..." contains over 100 lessons relating to CDOS and career related skills.
- A session includes direct student services for the duration of one period defined by the district as well as indirect student services for the remainder of the one hour session.
- Indirect student services include the provision of student specific goals and objectives consistent with the student's IEP as well as the maintenance of the record of the student specific accomplishments, efforts, and demonstrated need for additional instruction. This information will be provided to the CSE for the development of the IEP. The provision of written information to school personnel in the format of a report is an indirect service which is included in the per session rate. Indirect student services can include the review and/or development of the preliminary transition services plan as well as Career Plan, Student Exit Summary and Employability Profile as well as other transition assessments are included in

the per session rate. Also included in the per session rate would be the review of the IEP, the psychological, and any other vocational evaluation provided by the district to develop that plan as well as any preparation required for the student lesson.

- CEOTrackit is a component of the indirect services and provides a report of student performance in the curriculum and CDOS related skills. This is considered as part of the indirect students services for the session.
- These services can be administered remote using a multitude of platforms either by the choosing of the district or through the platform used by CEO.
- All services will have the same content but delivered through remote devices.

Community Access Training: \$65 per hour.

- Community Access Training shall be provided as both a direct and indirect student service. Instruction shall be provided in the use of community services i.e. libraries, stores, food shopping etc. as well as training in the use of banking and budgeting, transportation management strategies shall be developed that utilize multiple transportation modes for work or leisure. Community Access Training shall be provided to students on an individual basis and shall be billed at the hourly rate described above. Indirect student service time includes the provision of student specific goals and objectives consistent with the student's IEP as well as the maintenance of the record of the student specific accomplishments, efforts, and demonstrated need for additional instruction.
- Community Access Training shall include: evaluation of skill needs, student expectation of skills, fluency with the skills, including task analysis wherein they are assessed within the community for successful participation. Evaluation and assessment of community resources availability and student accessibility will be billed at the above rate.
- These services can be administered remote using a multitude of platforms either by the choosing of the district or through the platform used by CEO.
- All services will have the same content but delivered through remote devices.

Job Coaching & Career Consulting: For Non-Program (All Services Included) Group Services.

- For 2 students at the same time is \$100 per hour/session.
- For 3 students at the same time is \$125 per hour/session.
- For 4 students at the same time is \$150 per hour/session.

Career Lab/PAES Lab/Computer Literacy Classes/National Work Readiness \$98 per hour.

- Services provided that evaluates and provides instruction to student and groups of students in a classroom setting. This includes meeting transition and vocational goals while providing instruction to the development of the needs identified as part of their transition planning and vocational training.
- Classroom instructor provides service as well as a documentation that is included in the rate.
- PAES Lab management and data collection.
- Arrangement of guest speakers is incorporated into the rate.
- These services can be administered remote using a multitude of platforms either by the choosing of the district or through the platform used by CEO.
- All services will have the same content but delivered through remote devices.

Upward Options:

Module A: Postsecondary Preparation Training \$98 per period for up to 20 periods.

- A session is considered one period as defined by the district.
- A session shall consist of no greater than 6 students.
- An additional one period rate per week will be billed at the stated rate for preparation and evaluation of students work.

- The findings will be provided in written format and considered an indirect service as part of the stated rate.
- These services can be administered remote using a multitude of platforms either by the choosing of the district or through the platform used by CEO.
- All services will have the same content but delivered through remote devices.

Module B: Postsecondary Preparation Training Individual Services \$98 per period:

- Provided on an individual basis with a similar format as Module A.
- Development of executive functioning, social, self-determination and advocacy, disability awareness and coping skills. Coaching for career skill building.
- The findings will be provided in written format and included in the stated rate.
- These services can be administered remote using a multitude of platforms either by the choosing of the district or through the platform used by CEO.
- All services will have the same content but delivered through remote devices.

Transition Consulting Services: \$135 per hour of consultation and linkages services:

- Transition consulting services includes the planning, defining and implementation of the major points of IDEA defined services that the district is required to address. Attention would be provided to district issues which may lead to potential litigation.
- CSE and Annual Review attendance and support services to assist the district in the implementation and clarification of needed services.
- IEP/Transition Plan/SES services that enable a district to define their transition services and ensure compliance with NYSED regulations.
- Linkages to state adult agencies for a group of 10 or more students with a total charge of no more than 3 hours per student for the linkages services.
- Includes: ACCES-VR, (Adult Career and Continuing Education Services-Vocational Rehabilitation)
 OPWDD (Office of People with Developmental Disabilities), OMH (Office of Mental Health), NYSCB
 (New York State Commission for the Blind) SSA (Social Security Administration, Medicaid etc.) and
 DOL (Department of Labor).
- National Work Readiness Test enables a student to receive their CDOS credential upon passing. It requires approximately 2 hours during testing and the charge \$135 per student. It must be performed at a certified site. CEO's main office is a certified NWRT site.
- These services can be administered remote using a multitude of platforms either by the choosing of the district or through the platform used by CEO.
- All services will have the same content but delivered through remote devices.

Benefit Planning Consultation: \$135 per hour of consultation services.

- Performed by a Benefits and Works Practitioner certified through Cornell University.
- Provide families with information and strategies regarding Social Security Administration issues such as SSDI, SSI, Medicaid, and other potential problems families encounter.
- Assist families in the determination process with Social Security Administration.
- Identify potential options for families regarding entitlements.
- The findings will be provided in written format and considered part of the hourly rate.
- These services can be administered remote using a multitude of platforms either by the choosing of the district or through the platform used by CEO.
- All services will have the same content but delivered through remote devices.

Assessments: See below: If groups of students are being considered see chart.

• Level I format is designed to track students' interests and abilities. Level I requires approximately 4 hours @ \$98 per hour.

- Full Battery Level II for individual student is \$850 per student with comprehensive profile and evaluation. Full Battery is \$700 per student @ 3 students per day.
- Expanded Full Battery is \$1,325. Includes Interest Inventory and Behavior Rating Inventory of Executive Functioning Assessment/additional instruments necessary.
- Specialized Level II for multiple students at least 3 students per session.
 - o Special Career Level II \$500 per student up to two students.
 - Special Career Level II \$400 per student for three or more students.
- Level III Diagnostic Situational Assessment
 - Level III for one student \$1,325 per student.
 - Level III for two students \$1,450 for two students.
 - o Level III for 3 students \$1,630

Level I CEO staff to provide Level I using CEO format	Level II Full Battery Career Assessment	Level II Specialized Career Assessment	Level III Diagnostic Situational Assessment 10-14 hours
\$98 per hour for approximately 4 hours	\$700 per student @ no less than 3 students per day.	\$400 per student @ 3 student minimum per session.	\$1,325 per student at one minimum
CEO Certified Spec Ed or Guidance	Three students must be assessed per day.	\$500 per student @ 2 or less per session.	\$1,450 for up to 2 students
Individualized service.	Single or less than 3 students would be \$850 per student.	Up to 8 students per day	\$1,630 for up to 3 maximum
Interviews with parents, teacher, student, plus summary.	Expanded Full Battery \$1,325 per student.	Designed for student going to Special Career Tech	Assessment must be within same group.

Assistive Technology Evaluations: \$1,325 per evaluation

- Evaluations that provide a clear and concise report on the needs of the student and how to implement support services for that need.
- Recommendations that enable districts to make clear and concise decisions regarding equipment and training.
- These services can be administered remote using a multitude of platforms either by the choosing of the district or through the platform used by CEO.
- All services will have the same content but delivered through remote devices.

Assistive Technology Consulting: \$135 per hour:

- Training for students, families, and staff in the implementation of the recommendation of Assistive Technology Evaluations.
- Training provided regarding the use of equipment and other Assistive Technology devices.
- A session of one hour may include direct student/staff/family contact time for the duration of the district defined period, as well as indirect student service for the remainder of the one hour session.
- Indirect student service time includes the provision of student specific goals and objectives consistent with the student's IEP as well as the maintenance of the record of the student specific accomplishments, efforts, and demonstrated need for additional instruction.
- The findings will be provided in written format and considered part of the hourly rate.

- These services can be administered remote using a multitude of platforms either by the choosing of the district or through the platform used by CEO.
- All services will have the same content but delivered through remote devices.

Parent Training: \$135 per hour

- Training to assist parents to better understand the vocational and career planning in transition for their child.
- Enable parents to better understand adult service models in order to act in partnership with adult service providers.
- College preparation for students with disabilities.
- These services can be administered remote using a multitude of platforms either by the choosing of the district or through the platform used by CEO.
- All services will have the same content but delivered through remote devices.

Staff Development Services: \$135 per hour

- Staff training that includes a comprehensive "easy to understand" overview of transition services.
- Staff training for linkages to all adult services including SSA, ACCES/VR, OPWDD, CBVH, OMH and provider agencies.
- Staff training for "Levels of Assessment". Included is instruction on Level I, II and III Voc. Assessment their purpose and implementation.
- These services can be administered remote using a multitude of platforms either by the choosing of the district or through the platform used by CEO.
- All services will have the same content but delivered through remote devices.

The Comprehensive Transition Implementation Plan: Monthly pricing plan that is constructed to meet your budget and number of students includes:

- Transition Consulting Regulatory Compliance i.e.
 - o IEP review
 - o Indicator 13 and 14 assistance
- Job coaching
- Linkages to adult services
- Services to alternative high school students
- Assessment Packages
- College Preparation Services

- Job development
- Transition Consulting
- Linkages to employers via the School Industry Council
- Parent Training

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Rocky Point Union Free School District Appendix B 2021-2022 Group Program Rate Sheet

This program is designed to provide vocational training, work experiences and community access training for the Life Skills Program at Rocky Point Union Free School District. All services are included within the monthly price as they include the students designated in the Life Skills Program served by the CEO Program. Any necessary linkage and transfer to an adult provider will be provided as a transition service prior to leaving high school. All other services will be provided to the students in groups.

Nine Points of Transition: All CEO staff are trained in the application of the Nine Points of Transition for the students they serve. This enables them to provide transition services as a supplement to the transition needs of the district. This includes the following issues and potential needs for the students:

- Employment or Post-Secondary Education
- Recreation/Leisure
- Linkages to Adult Services
- Health/Medical
- Residential Needs
- Entitlement Needs
- Transportation
- Advocacy/Legal Needs
- Person/Home/Money Management

Internship Program: Students go to community based work sites on a rotation arranged by CEO. The number of sites per school year range from 6-8 sites per year.

- For 5 days per week depending on the needs of the district.
- For approximately 6-8 weeks per site.
- The sites can include the following industries:
 - 1. Hospitality
 - 2. Retail
 - 3. Office/Clerical/Library
 - 4. Horticulture (if available)
 - 5. Food Services
 - 6. Healthcare

- 7. Custodial and Buildings/Grounds
- 8. Childcare
- 9. Health Services

- The Department of Labor or OPWDD may sponsor the students in order for them to be paid during parts of the year or if funds are available. This can include work in local businesses, governmental offices or not for profit organizations. CEO will assist the district in linking the students to this option if available. All costs associated with arranging and enrolling the identified students into the program are built into the program.
- World of Work Tours (WOW Tours) that provide students with the opportunity to visit businesses in their community and have a better understanding of who the business hires, why they hire them and what the criteria is for getting the job. The explanation is provided by the employer to the students after preparation from CEO staff. All costs associated with arranging and setting up the WOW Tours are part of the program price.
- Travel training is a component of the community based programming. Students are provided with goals regarding travel training as well as regular routines of using public transportation on a monthly basis. All costs associated with arranging and setting up the travel training are part of the program price. Students are responsible for their bus or train fare.
- Community Access training incorporates using the facilities/businesses within a community (see Community Access Training).
- All job development, development of social stories, preparation of the worksites, development of natural supports, planning for the travel training are all part of the package price.

Assessment Services: All students enrolled in the program receive these services as part of the program price.

- Level I Assessment using the CEO format for the Level I. This format will include meeting with the parent as well to determine appropriate outcomes.
- Level III at each of the sites in the internship model.
- Level II if requested by the district, however, students in a Life Skills program are usually best served by a Level III assessment.

All costs associated with arranging and setting up the Level III are part of the program price.

Community Access Training: Students will be provided opportunities to explore community activities that are required in adult living. This portion of the program works closely with the district Life Skills Teacher in ensuring a coordinated approach to instruction.

- Travel training using public transportation.
- Perform shopping tasks for family.
- Banking use and training.
- Use of the public library.
- Development of potential volunteer activity that will transcend the high school experience and continue into adulthood.
- Training in the use of the One Stop Center in the Department of Labor.

Job Placements and Supported Employment: Any of the students in the Life Skills Program will be provided, if they so choose, the opportunity for placement during their last year in high school. All linkages for ACCES/VR and OPWDD are included in the services.

- Job placement within proximity to the student's home and/or accessible via specialized transportation.
- Job placement with job coaching that transition into intermittent site visits of no less than once per week that replicate adult supported employment services.
- Students are linked to ACCES/VR and OPWDD with a job.
- CEO will handle the transfer to an adult provider for a seamless transition.

Employment Class: Students receive training regarding the resume/portfolio development, job search skills, interview training, applications, social skills in the workplace etc.

- The instructor uses the CEO "Career Services for People In & Beyond Special Education" as well as other resources such as UNIQUE.
- Social skills and issues from the workplace are discussed and solutions for everyday workplace issues are addressed.
- Social Stories are developed to prepare the students for all outings. We also utilize Assistive Technology to facilitate student instruction.
- All preparation of the Employment Class are part of the package price

Parent Training: All costs associated with Parent Training for students in the Life Skills Program are included in the costs.

- A two hour course to assist parents to better understand the vocational and career planning for the child.
- Instruction for parents to better understand services and service models in order to act in partnership with future adult service providers.
- Any parent assistance needed regarding Social Security Administration as CEO has on staff a Certified Benefits and Work Incentives Practitioner from Cornell University to handle all issues.

Summary:

- Life Skills students are best served in an ½ day format.
- Each student to receive services in Vocational Life Skills as described above.
- The following is a summary of the pricing.
 - Contract expense for 10 month year for 8 or more students in Vocational Life Skills:
 - o \$1,750 per student per month for up to 8 students.
 - Additional students above 8 students cost are \$650 per month per additional student in a group setting.
 - Ex. If 10 students are served the first 8 are \$1,750 per month per student, the next two are \$650 per month per student.
 - o If the student census drops below 3 students, the following rates need to go into effect:
 - \$2,290 per student per month for 2 students in a half day group program served by a single CEO Career Consultant.

- \$65 per hour per student per month for 1 student in a group program.
- Any student outside of the program and requiring a one to one (1:1) job coaching model, CEO's regular rate of \$65 per hour will be used.

Program services include all of the following for the monthly rate:

- Nine Points of Transition and IEP development of those goals and services.
- Level I, II and III Assessments.
- Job development, Job placement at the end of the program (if requested).
- World of Work Tours.
- Employment Classes.
- Internships in the local community settings.
- Community Access Training.
- Travel Training.
- Participation in all CSE and any required parent meetings.
- Team meetings for students in the Vocational Life Skills with district staff.
- Any additional students (from outside the life skills program) can receive services at the rates designated on the regular CEO prices sheet (Addendum A).

Thank you for considering Career and Employment Options, Inc. and we look forward to providing quality services to you and your students.

Sincerely, Nicholas A. Villani, President/CEO Career and Employment Options, Inc.

Career and Employment Options, Inc. 1 Rabro Drive Suite 102 Phone 631-234-6064 Fax 631-234-6081 Rocky Point Union Free School District 2021-2022

School Business Partnership Rate Sheet Addendum C

The following are the hours and costs for each of the tasks associated with CEO's School Business Partnership (SBP) program and other related services. Although the hourly rate is consistent, the number of hours are approximate in order to give the district the flexibility in determining their needs.

School Business Partnership:	Three events spanning the school year	
Specialty Events:	STEM, STEAM, Apprenticeship Programs, Career Days,	
	Roundtable Meetings and Reverse Career Day.	
Career Lab:	Ongoing instruction and interface with businesses.	
Job Development/Apprenticeship:	Provide job development and linkages for DOL apprenticeships	

SCHOOL BUSINESS PARTNERSHIP (SBP).

Please note all hours are approximate and can be flexible and virtual depending on the district needs.

- Contact and maintain relationship with school personnel and begin the planning process.
- Contact local business organizations and presenting the SBP opportunities.
- Create and send out any marketing materials pertaining to the SBP.
- Develop and set up materials for meetings/events.
- Businesses to discuss economic trends, business challenges, job/internship opportunities.
- Coordinate all meetings and activities with district staff.
- Coordinate logistics for the 3 specialty events chosen by school district.

School Business Partnership: Usually 3 Events for the school year.	Approximate Hours for 3 Events	Rate per Hour
	75-100	\$70

If a district would prefer to either supplement the SBP or use as a stand-alone Specialty Event:

SPECIALITY EVENTS

This is a one-day event that is structured for the business and the school to create internships or jobs for the students in the district. This can include Roundtable Meeting, STEM, STEAM, Career Day, Reverse Career Day and Apprenticeship Program events.

- Create a panel of business representatives that will present their business, industry, and career paths.
- Assessing and receiving career interests from the district from their students.
- Reach out and meet with the business community in response to those interests.
- Planning the event in cooperation with district personnel.
- Development of the public relations materials.
- Develop internships, employment, and apprenticeship opportunities.
- Roundtable Meetings when students of all abilities contribute to conversations with businesses to discuss job opportunities and create goals to strengthen school business relations.
- Reverse Career Day when students learn to market themselves to businesses.

Specialty Events are generally one day events with a specific theme with flexible hours depending on the event.	Approximate Hours	Rate per Hour
	25-50	\$70

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CAREER LAB

- Classroom instructional format for interview
- Engage local business organizations, including specific businesses that represent industries for a specific local region regarding interactive event with students.
- Work with specific students to participate in elevator speeches, mock interviews, round table or a large group presentation.
- Develop interview scripts with the participating students.
- Provide instruction to students in the preparation of engaging with businesses.
- Evaluate student skill level in their interactions with the business.
- Assist students in their resume, mock interview, presentation and overall networking skills.

Career Lab is instructional format that incorporates both instruction and business leaders to improve student performance.	Approximate Hours	Rate per Hour
	20	\$70

JOB/APPRENTICESHIP LINKAGE PROGRAM.

- Linkage to DOL apprenticeship programs for full time employment at the end of a student's high school career.
- Develop job placements for general and special education students through the SBP and other networking services provided to the district.
- There is a 5-hour minimum usage of services. * These hours will be flexible and based upon district need.

Linkage to apprenticeships and job development.	Approximate Hours	Rate per Hour
	3	\$70

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Rocky Point Union Free School District Addendum D for Summer 2021 Rate Sheet

This program for the Rocky Point Union Free School District is designed to provide vocational training, work experiences and community access training for the Life Skills Program at Rocky Point Union Free School District. All services are included within the monthly price as they include the students designated in the Life Skills Program served by the CEO Program. Any necessary linkage and transfer to an adult provider will be provided as a transition service prior to leaving high school. All other services will be provided to the students in groups. A sample schedule is provided below:

	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1	Worksite	Worksite	Worksite	Worksite	WOW Tour
Week 2	Worksite	Worksite	Worksite	Worksite	Community Access
Week 3	Worksite	Worksite	Worksite	Worksite	Employment Class
Week 4	Worksite	Worksite	Worksite	Worksite	WOW Tour
Week 5	Worksite	Worksite	Worksite	Worksite	Community Access
Week 6	Worksite	Worksite	Worksite	Worksite	Employment Class

Internship Program: Students go to community based work sites on a rotation arranged by CEO. The number of sites for the summer can remain at one site or utilize two sites to enable the students to have a variety of choices for the summer.

- For approximately 3 days per week depending on the needs of the district.
- Alternating one day of every other week to utilize community access experiences.
- The sites can include the following industries:
 - 1. Hospitality
 - 2. Retail
 - 3. Office/Clerical/Library
 - 4. Horticulture (if available)
 - 5. Food Services

- 6. Healthcare
- 7. Custodial and Buildings/Grounds
- 8. Childcare
- 9. Health Services

- The Department of Labor may sponsor the students in order for them to be paid during parts of the year or if funds are available. This can include work in local businesses, governmental offices or not for profit organizations if the district has a Memorandum of Understanding (MOU) with the DOL. In the event the district does <u>not</u> have an MOU, CEO will assist the district in the process. All costs associated with arranging and enrolling the identified students into the program are built into the program.
- World of Work Tours (WOW Tours) that provide students with the opportunity to visit businesses in their community and have a better understanding of who the business hires, why they hire them and what is the criteria for getting the job. The explanation is provided by the employer to the students after preparation from CEO staff. All costs associated with arranging and setting up the WOW Tours are part of the program price.
- Travel training is a component of the community based programming. Students are
 provided with goals regarding travel training as well as regular routines of using public
 transportation on a monthly basis.
- Community Access training incorporates using the facilities/businesses within a community (see Community Access Training).
- All job development, development of social stories, preparation of the worksites, development of natural supports, planning for the travel training are all part of the package price.

Assessment Services: All students enrolled in the program receive these services as part of the program price that will extend into the summer program. During the summer assessments are often not required however if requested by the district will be

- Level I Assessment using the CEO format for the Level I. This format will include meeting with the parent as well to determine appropriate outcomes.
- Level III at each of the sites in the internship model.
- Level II if requested by the district however students in a Life Skills program are usually best be served by a Level III assessment.

Community Access Training: Students will be provided opportunities to explore community activities that are required in adult living. This portion of the program works closely with the Life Skills Teacher in ensuring a coordinated approach to instruction.

- Travel training using public transportation.
- Perform shopping tasks for family.
- Banking use and training.
- Use of the public library.
- Development of potential volunteer activity that will transcend the high school experience and continue into adulthood.
- Training in the use of the One Stop Center in the Department of Labor.

Employment Class: Students receive training regarding the resume/portfolio development, job search skills, interview training, applications, social skills in the workplace etc.

- The instructor uses the CEO "Career Services for People In & Beyond Special Education" as well as other resources such as UNIQUE.
- Social skills and issues from the workplace are discussed and solutions for everyday workplace issues are addressed.
- Social Stories are developed to prepare the students for all outings. We also utilize Assistive Technology to facilitate student instruction.

Summary:

- The following is a summary of the pricing.
 - o Contract expense for summer of 6 weeks for students in Vocational Life Skills:
 - o \$1,750 per student per month for up to 8 students.
 - o First month of summer, at \$1,750 per students up to 8 students.
 - o Second month of summer pro-rated at \$1,750 per student up to 8 students.
 - Additional student above 8 students cost \$650 per month per additional student in a group setting.
 - Any student requiring a one to one (1:1) job coaching model outside of the program hours will be charged CEO's regular rate of \$65 per hour. (see the Addendum A 2021-2022 Price List)
 - If the student census drops below 3 students, the following rates need to go into effect:
 - \$2,290 per student per month for 2 students in a half day group program served by a single CEO Career Consultant.

All services include:

- Level I, II and III Assessments (during the school year)
- Job development, Job placement at the end of the program (if requested).
- World of Work Tours
- Employment Classes
- Internships in the local community settings.
- Community Access Training.
- Travel Training
- Participation in all CSE and any required parent meetings.
- Team meetings for students in the Vocational Life Skills with district staff.
- Any additional students (from outside the life skills program) can receive services at the rates designated on the regular CEO prices sheet (Addendum A).

Thank you for using Career and Employment Options, Inc. and we look forward to providing quality services to you and your students.

Nicholas A. Villani, President/CEO Career and Employment Options, Inc.

School Year 2021-2022

RESOLUTION (A)

JOINT MUNICIPAL COOPERATIVE BIDDING PROGRAM

WHEREAS, various educational and municipal corporations located within the State of New York desire to bid jointly for generally needed services and standardized supply and equipment items; and

WHEREAS, the <u>Rocky Point Union Free School district</u>, an educational/municipal corporation (hereinafter the "Participant") is desirous of selectively participating with other educational and/or municipal corporations in the State of New York in joint bidding in the areas mentioned above pursuant to General Municipal Law § 119-0 and Education Law Section 1950; and

WHEREAS, the Participant is a municipality within the meaning of General Municipal Law § 119-n and is eligible to participate in the Board of Cooperative Educational Services, First Supervisory District of Suffolk County (hereinafter Eastern Suffolk BOCES) Joint Municipal Cooperative Bidding Program (hereinafter the "Program") in the areas mentioned above; and

WHEREAS, the Participant acknowledges receipt of the Program description inclusive of Eastern Suffolk BOCES' standard bid packet and the general conditions relating to said Program; and

WHEREAS, with respect to all activities conducted by the Program, the Participant wishes to delegate to Eastern Suffolk BOCES the responsibility for drafting of bid specifications, advertising for bids, accepting and opening bids, tabulating bids, awarding the bids, and reporting the results to the Participant.

BE IT RESOLVED that the Participant hereby appoints Eastern Suffolk BOCES to represent it and to act as the lead agent in all matters related to the Program as described above; and

BE IT FURTHER RESOLVED that the Participant hereby authorizes Eastern Suffolk BOCES to place all legal advertisements for any required cooperative bidding in <u>Newsday</u>, which is designated as the official newspaper for the Program; and

BE IT FURTHER RESOLVED that a Participant Meeting shall be held annually consisting of a representative from each Program Participant. Notice of the meeting shall be given to each representative at least five (5) days prior to such meeting; and

BE IT FURTHER RESOLVED that an Advisory Committee will be formed consisting of five to ten representatives of Program Participants for a term of three (3) years as authorized by General Municipal Law §119-o.2.j.

BE IT FURTHER RESOLVED that this Agreement with the Participant shall be for a term of one (1) year as authorized by General Municipal Law §119-o.2.j.

BE IT FURTHER RESOLVED that the Participant agrees to pay Eastern Suffolk BOCES an annual fee as determined annually by Eastern Suffolk BOCES to act as the lead agent for the Program.

Dated:

Rocky Point Union Free School District
Name of Educational or Municipal Corporation

Signature of Official

Susan Y. Sullivan

Name of Official

President-Board of Education

Title

Christopher A. Van Cott

Contact Person - Name

Assistant Superintendent for Business Title

chrisvancott@rockypoint.kl2.ny.us

E-Mail Address

Created: June 15, 2004 Revised: January 20, 2021

Board of Cooperative Educational Services First Supervisory District of Suffolk County ("Eastern Suffolk BOCES")

PROGRAM DESCRIPTION

Joint Municipal Cooperative Bidding Program - CoSer 612

Description of the Program

Cooperative bidding is an alternative method of bidding that Eastern Suffolk BOCES can offer to local school districts and other municipalities. By using the Eastern Suffolk BOCES Joint Municipal Cooperative Bidding Program (hereinafter the "Program"), school districts, and other municipalities (hereinafter "Participants") may realize significant time allocation and cost savings within their purchasing functions. This method of bidding allows Participants to join with Eastern Suffolk BOCES to coordinate some or all of their bidding needs by cooperatively bidding goods and services for their mutual benefit. Eastern Suffolk BOCES will assign a Program Coordinator to administer the Program. The Program is offered pursuant to General Municipal Law §119-0 and Education Law §1950.

Benefits of the Program

Participants may benefit from cooperative bidding activities with Eastern Suffolk BOCES in many ways, including the following:

- 1. **Lower (shared) administrative costs:** By eliminating duplicative efforts, Participants may save on administrative and clerical time as well as copying and legal publishing costs;
- 2. **Improved response from vendors:** Vendors may realize they are bidding on a potentially larger quantity and may be encouraged to compete for the purchase award. In addition, the bid solicitations may attract a broader range of vendors. Greater competition may lead to lower bid prices;
- 3. **Better product specifications:** Combining the knowledge and experience of all Participants in the Program may result in developing better bid specifications for goods and services; and
- 4. **Better compliance with State statutes on purchasing:** Since many purchases are subject to competitive bidding, cooperative bidding activities coordinated by Eastern Suffolk BOCES will potentially foster better compliance with bidding statutes and produce heightened awareness of legal requirements.

Participation in the Program

1. Participation in the Program must be evidenced by the adoption of either of the two attached (Exhibit 1 and Exhibit 2) Joint Municipal Cooperative Bidding Program Resolutions by the governing body of the Participant before its acceptance to the Program. A Participant

- enrolling in the Program must file said resolution with Eastern Suffolk BOCES by July 31 of the school year in which it wishes to participate in awards of the Program.
- 2. The costs of operation of the Program will be prorated and will be paid by the Participant to Eastern Suffolk BOCES as an annual fee, payable over a period of ten (10) months commencing in September.
- 3. Eastern Suffolk BOCES shall act as the lead agency for Program Participants. Eastern Suffolk BOCES shall be responsible for drafting of bid specifications, advertising for bids, accepting and opening bids, tabulating bids, either recommending or awarding the bids dependent upon which resolution is filed, and reporting the results to the Participants.
- 4. A Membership Committee shall be formed to assist Eastern Suffolk BOCES. The Membership Committee shall consist of one (1) representative from each Participant. The Membership Committee shall meet at least annually.
- 5. An Advisory Council shall be formed pursuant to the guidelines in Exhibit 3.
- 6. Bids will be developed by Eastern Suffolk BOCES based upon categories determined pursuant to applicable procedures.
- 7. An invitation to bid, with a statement of requirements and general conditions, will be sent to vendors, and advertised pursuant to General Municipal Law § 103.
- 8. Eastern Suffolk BOCES will place all legal advertisements for such cooperative bidding in Newsday, which shall be designated as the official newspaper for the Program.
- 9. Bids received before the designated time for opening will remain sealed and confidential until the designated time for opening. Sealed envelopes containing the bids will be stamped to indicate the date, time, and place of receipt. A bidder may seek to change his/her bid before the bids are opened. If this occurs, there will be no objection on the part of the Program Coordinator, provided the revised bids are received prior to the time and date specified in the bid opening. Bids received after the time and date specified for bid opening shall be refused and returned to the bidder.
- 10. Awards will be recommended and/or made by Eastern Suffolk BOCES to the lowest responsible bidder who meets the specifications. Participants that elect not to delegate awarding authority to Eastern Suffolk BOCES are responsible for making all bid awards through their governing body.
- 11. Participants in the Program shall issue their own purchase orders when purchasing from an award of the Program and accept full responsibility for all payments due the vendor relating to said purchase orders.
- 12. Eastern Suffolk BOCES, as the lead agent, will comply with notice requirements imposed by New York State Labor Law § 220 after awarding a public works contract. All Participants

utilizing such an award are also individually responsible for notifying the Department of Labor of the name and address of the contractor, the date a contract was let, and the consideration stipulated in the contract, as well as following any other prevailing wage laws.

- 13. Participants in the Program may not deviate from the terms of the bid specifications when utilizing an award of the Program and will notify Eastern Suffolk BOCES of any material deviations by the vendor from the bid specifications.
- 14. School districts or other municipalities may only utilize awards of the Program if they are a member at the time of bid award.
- 15. Eastern Suffolk BOCES supports their bids through vendor issue resolution and manages any legal issue that may arise.

Created: June 15, 2004 Revised: March 14, 2014

ADVERTISEMENT INVITATION TO BIDDERS

The Board of Education of the Rocky Point Union Free School District at Rocky Point, Town of Brookhaven, Suffolk County, New York hereby invites sealed bids for:

Schedule:

22-04 In-Car Drivers Education

as specified in the contract documents.

Bids will be received until 2:30 pm, prevailing time on Thursday, <u>March 25, 2021</u> at the District Administrative Office, 90 Rocky Point-Yaphank Road, Rocky Point, New York, 11778, at which time and place all bids will be publicly opened and read aloud. Vendors wishing to view the bid opening must wear a face covering to gain entry.

Bid title should be clearly marked on each envelope, along with the date and time of the bid opening.

The Board of Education reserves the right to reject any and all bids or to accept that bid which in its judgment is in the best interest of the School District.

Each bid must be accompanied by a Bid Bond or Certified Check payable to the Board of Education, in an amount not less than FIVE percent (5%) of the amount of the bid.

Any bid submitted will be binding for **SIXTY** (60) days after the formal opening thereof, and no bid shall be withdrawn during that time, pending the decision of the Board of Education.

The contract documents, including specifications may be examined and obtained between the hours of 9:00 am and 3:00 pm, Monday through Friday at the District Administrative Office, 90 Rocky Point-Yaphank Road, Rocky Point, New York beginning Thursday, March 4, 2021.

BY ORDER OF THE:
Board of Education
Rocky Point Union Free School District
At Rocky Point, Town of Brookhaven
Suffolk County, New York

By: Debra Hoffman Purchasing Agent

DATED: March 4, 2021

LEGAL ADVERTISING

ROCKY POINT UNION FREE SCHOOL DISTRICT

Administrative Office 90 Rocky Point-Yaphank Rd Rocky Point, NY 11778

Bid #22-04 In-Car Drivers Education

BID SUBMITTAL CHECKLIST

Bidders shall include the items on this checklist with their bid:
✓ 1. Bid Submittal Checklist
2. Bidders Proposal and Certification page (signed)
3. Bid Submittal Form (signed)
4. Vehicle Fleet Information Form
5, COVID-19 Mitigation Plan
6. Reference Sheet
7. Statement of Bidder's Qualifications Form (2 pages, signed and notarized)
8. Affidavit of Compliance Form (signed and notarized)
9. Non-Collusive Bidding Certification (signed and notarized)
10. Certification of Compliance with the Iran Divestment Act (signed and notarized)
11. Instructor Information (page 16)
a. Instructor's Name
b. NYS DMV524- Driving School Instructor Certificate c. Driver's License
12. Current New York State DMV Driving School License (page 2 of Scope)

Vendor Name: SUFFOLK AUTO DRIVING SCHOOL

ROCKY POINT UNION FREE SCHOOL DISTRICT

Administrative Offices

90 Rocky Point-Yaphank Road Rocky Point, New York 11778

BIDDERS PROPOSAL AND CERTIFICATION

The Board of Education Rocky Point Union Free School District Rocky Point, NY 11778

Attention: Business Office

Gentlemen:

We, the undersigned, herewith propose and agree to furnish to the Board of Education of the Rocky Point Union Free School District, Rocky Point, New York, any one or all of the items upon which we have bid, for the prices indicated herein, in accordance with the specifications. We further certify that we have read these specifications and our offer is in strict accordance therewith.

Bid No: 22-04 In-Car Drivers Education

Date Due: March 25, 2021 @ 2:30pm

PRICE PER STUDENT

TOTAL BID PRICE for a minimum of (120) students for the period 7/1/21 through 6/30/22:

Respectfully submitted,

Suffolk Auto Dening School Name of Firm 30 VERNOW Valley Ross

Note: All communication in connection with this bid should be addressed to Debra Hoffman, Purchasing Agent, Rocky Point Union Free School District, Business Office, 90 Rocky Point-Yaphank Road, Rocky Point, New York 11778. Telephone number 631-849-7563.

ROCKY POINT UNION FREE SCHOOL DISTRICT

In-Car Drivers Education

Bid #22-04

INSTRUCTIONS TO BIDDERS/GENERAL INFORMATION

A. Bid Distribution

Rocky Point Union Free School District officially distributes Bid documents from the Purchasing Department. Copies of Bid documents obtained from any other source are not considered official copies. If you have obtained this document from a source other than the Rocky Point UFSD Purchasing Department, the Rocky Point UFSD will not guarantee the integrity of the document, nor will we have the ability to effectively disseminate addenda or clarification to the specifications, should the need arise.

B. Bid Submission

Bids shall be submitted in a sealed envelope addressed to the Purchasing Agent. Envelopes must be clearly marked Bid# 22-04 In-Car Driver Education and with the name and address of the Proposer. Proposals must be received no later than 2:30pm on March 25, 2021 at the following address:

Rocky Point Union Free School District Attn: Debra Hoffman, Purchasing Agent Administrative Office 90 Rocky Point-Yaphank Road Rocky Point, NY 11778

Proposals submitted after the stated time and date will not be considered and will be returned to the firm unopened.

C. Period of Contract

This contract shall cover the period from $\frac{7}{01}$ through $\frac{6}{30}$.

D. Special

The services required to be performed by this bid must comply with any and all Federal, State, Municipal and Local Laws pertinent thereto, in addition to the rules and regulations of any Administrative Agency having jurisdiction thereof, together with any amendments to said laws, rules and regulations.

E. Reservation

The school district shall order the articles specified in this bid from the successful bidder/s, subject to the availability of appropriated funds, i.e. budget approved and passed by the voters of the district at an annual election held by the district for that purpose.

The contract may be canceled or annulled by the district upon non-performance of contract terms or failure of the Contractor to furnish certified check or performance surety within ten (10) days from date of request. Any unfulfilled deliveries against such contract may be purchased from other sources at the Contractor's expense.

F. Hold Harmless

The Contractor agrees to indemnify and save harmless the Rocky Point Union Free School District against any and all liability, loss, damage, cost or expenses which the Rocky Point Union Free School District may hereafter incur, suffer, or be required to pay by the reason of injury to any person or persons through the negligent or willful act of the Contractor or sub-contractor or the servants or agents of the Contractor or sub-contractor or for any other reason whatsoever arising out of the performance of said contract.

In the event that any action suit or proceeding is brought against the Rocky Point Union Free School District upon any liability arising out of the contract hereinbefore mentioned, the said Rocky Point Union Free School District shall give notice in writing thereof to the Contractor by certified mail-return receipt requested, addressed to the Contractor at the address herein given. Upon receipt of such notice the Contractor at his or its own expense shall defend against such claim, action or proceeding and take all such steps as may be necessary or proper therein by preventing the entry of a judgment or order against the Rocky Point Union Free School District and to do whatever else may be necessary to protect the interest of the Rocky Point Union Free School District.

G. Bid Check/Bond

Each bidder shall include with his bid, a bid bond or certified check in the amount of five percent (5%) of his total bid. Such checks or bonds will be returned to unsuccessful bidders as soon as contracts are signed or purchase orders acknowledged by the successful bidders. Bid deposits of successful bidders will be returned upon the satisfactory completion of the contract.

H. Insurance Requirements-Contractor

The Contractor shall purchase and maintain during the life of the contract the following insurance. The Rocky Point Union Free School District and the Rocky Point Board of Education, with the exception of Workers' Compensation and Employers Liability Insurance, shall be named as additional insured and certificate holder. An original of the certificate shall be mailed to the District, with a provision that in the event the policies are either canceled or diminished, at least 30 days prior written notice by certified mail, return receipt requested, thereof shall be given to the District. Any endorsements affecting coverage for additional insured must be attached to the certificate. The Contractor shall not commence work under this contract until they have obtained all insurance as required and such insurance has been approved by the District.

The Contractor shall require any subcontractor(s) to provide all of the requirements of this section before any work is to commence. In addition, all subcontractors must carry statutory Workers' Compensation and Employers Liability Insurance for their employees.

I. For All Coverages:

Any deductible or self-insured retentions must be declared to and approved by the District. Any failure to comply with reporting provisions of the policies shall not affect coverage provided to the District, its Board of Education, (Board) officers, employees or volunteers.

II. Commercial General Liability Insurance:

"Occurrence" form, including Premises-Operations, Products-Completed Operations, Contractual, Personal Injury, Owner-Contractor Protective and Fire Damage Legal Liability. Coverage shall be in, at minimum, the amount of \$1,000,000 per occurrence, \$2,000,000 aggregate.

III. Comprehensive Automobile Liability Insurance:

On owned, hired, leased, or non-owned motor vehicles in the amount of \$1,000,000 per occurrence, Combined Single Limit. Policy should include code 1-"any auto" and Insurance Services Office (I.S.O.) endorsement CA 0029 (Ed. 12/88)-Changes in Business Auto and Truckers Coverage.

With regard to Comprehensive Automobile and Commercial General Liability coverages, the policies shall be endorses to contain the following provisions:

- Contractor's insurance coverage shall be primary insurance as respects the District, its Board, officers, employees and volunteers.
- Any insurance or self-insurance maintained by the District, its Board, officers, Employees and volunteers shall be excess of the Transportation Company's Insurance and shall not contribute to it.
- The District and its Board shall enjoy all rights and privileges of the policy contract without the responsibility to pay premiums

IV. Workers' Compensation and Employers Liability:

Statutory Workers' Compensation and Employers Liability Insurance for all of his employees to be engaged in work under the contract and if such work is sublet, the contract shall require the subcontractor to maintain similar coverage for all of his employees.

I. Examination of the Site, Contract Documents and Other Relevant Material:

Each bidder shall visit the site of the proposed work, fully acquaint and familiarize himself with conditions as they fully exist and the character of the operations to be carried on under the proposed contract and make such investigations as he may see fit so that he may fully understand the facilities, difficulties and restrictions attending the execution of the work under this contract. The failure or omission of any bidder to receive or examine any form, instrument or document or any part of the contract documents or to visit the site and acquaint himself with conditions there existing, shall in no way relieve any bidder from any obligations with respect to this proposal, including that of furnishing the material and labor necessary to complete the performance of all the provisions of the proposed contract and the contemplated work therein. By submitting a proposal, the bidder represents and agrees that he has carefully examined and investigated the site and all other matters which in any way affect the work or performance of the contract. As a result of such examination he fully understands the intent and purpose thereof, and his obligations thereunder and that he will not make any claim for or have any right to damages because of any lack of information.

J. Extension Clause

Extension Clause-Sixty (60) days prior to the termination of the contract, the parties, upon mutual written agreement, may extend the term for one (1) year and if extended as aforesaid, the parties may again, upon mutual written agreement, extend the contract for two (2) additional one-year periods at the same rates, terms and conditions.

All invitations to bid issued by the above name School District will bind bidders and successful bidders to the conditions and requirements set forth in these general conditions, and such conditions shall form an integral part of each purchase contract awarded by the School District.

- 1. The date and time of bid opening will be given in the Notice to Bidders.
- 2. All bids must be submitted on and in accordance with forms provided by the board.
- 3. All bids received after the time stated in the Notice to Bidders may not be considered and will be returned to the bidder. The bidder assumes the risk of any delay in the mail or in the handling of the mail by employees of the school district. Whether sent by mail or by means of personal delivery, the bidder assumes responsibility for having his bid deposited on time at the place specified.
- 4. All information required by Notice to Bidders, Specifications and Bid Offer in connection with each item against which a bid is submitted, must be given to constitute a regular bid.
- 5. The submission of a bid will be construed to mean that the bidder is fully informed as to the extent and character of the supplies, materials or equipment required and a representation that the bidder can furnish the supplies, materials, or equipment satisfactorily in compliance with the specifications.
- 6. No alteration, erasure or addition is to be made in the typewritten or printed manner. Deviation from the specifications must be set forth in space provided in bid for this purpose.
- 7. Prices and information required, except signature of bidder, should be typewritten for legibility. Illegible or vague bids may be rejected. All signatures must be written. Facsimile, printed or typewritten signatures are not acceptable.
- 8. Sales to school districts are not affected by any fair trade agreements. (General Business Law, Ch. 39, Sec 369-a, Sub.3, L. 1941)
- 9. No charge will be allowed for federal, state or municipal sales and excise taxes since the school district is exempt from such taxes. The price bid shall be net and shall not include the amount of any such tax. Exemption certificates, if required, will be furnished on forms provided by the bidder.
- 10. In all specifications, the words "or equal" are understood after each article giving manufacturer's name or catalog reference, or on any patented article. The decision of the school district as to whether an alternate or substitution is in fact "equal" shall be final. If bidding on items other than those specified, bidder must in every instance give the trade designation of the article, manufacturer's name, and detailed specification of item he proposes to furnish. Otherwise, bid will be construed as submitted on the identical item as specified.

- 11. Bids on equipment must be on standard new equipment, of latest model and in current production, unless otherwise specified.
- 12. All regularly manufactured stock electrical items must bear the label of the Underwriters' Laboratories, Inc.
- 13. When bids are requested on a lump sum basis, bidder must bid on each item in the lump sum group. A bidder desiring to bid "no charge" on an item in a group must so indicate; otherwise bid for the group may be rejected.
- 14. All prices quoted must be "per unit" as specified; e.g., do not quote "per case" when "per dozen" is requested; otherwise, bid may be rejected.
- 15. Bidder must insert the price per unit and the extensions against each item in his bid. In the event of a discrepancy between the unit price and the extension, the unit price will govern. Prices shall be extended in decimals, not fractions.
- 16. Prices shall be net, including transportation and delivery charges fully prepaid by the successful bidder to destination indicated in the proposal. If award is made on any other basis, transportation charges must be prepaid by the successful bidder and added to the invoice as a separate item. In any case, title shall not pass until items have been delivered and accepted.
- 17. a. The bid has been arrived at by the bidder independently and has been submitted without collusion with any other vendor of materials, supplies or equipment of the type described in the invitation for bids,
 - b. The contents of the bid have not been communicated by the bidder, nor, to its best knowledge and belief, by any of its employees or agents, to any person not an employee or agent of the bidder or its surety on any bond furnished herewith prior to the official opening of the bid.
 - c. That to his knowledge no member of the Board of Education of the Rocky Point Union Free School District or any officer or employee or person whose salary is payable in whole or in part from the treasury of said Board of Education is directly or indirectly interested in this bid or in the supplies, materials, equipment, work or service to which it relates, or in any portion of the profits thereof.
- 18. All bids must be sealed. They may be submitted either in plain, opaque, envelopes or in those furnished by the school district. All bids must be addressed to:

Rocky Point Union Free School District
Administrative Offices
90 Rocky Point-Yaphank Road
Rocky Point, NY 11778
Attention: Purchasing Agent

Bid envelopes must be clearly marked "Bid". Also the date and time of the bid opening as indicated on the Notice to Bidders must appear on the envelope. Bids must not be attached to or enclosed in packages containing bid samples. Telegraphed bids may be considered at the discretion of the school district. Telephoned quotations or amendments will not be accepted at any time.

- 19. No interpretation of the meaning of the specifications or other contract document will be made to any bidder orally. Every request for such interpretation should be in writing, addressed to the school district, not later than five (5) days prior to the date fixed for the opening of bids. Notice of any and such interpretations and any supplemental instructions will be sent to all bidders of record by the school district in the form of addenda to the specifications. All addenda so issued shall become a part of the contract documents.
- 20. If the supplies, materials or equipment are to be delivered over an extended period of time, or if the specifications so state, then the successful bidder may be required to execute an agreement in relation to the performance or his contract, such agreement to be executed by the bidder within 15 days after notification to execute such contract. If the specifications so state, the successful bidder also may be required to furnish a performance bond equal to the full amount of the contract to guarantee the faithful performance of such contract. Such performance bond shall be maintained in full force and effect until the contract shall have been fully performed. The surety company furnishing such performance bond shall be authorized to do business in the State of New York, be a A.M. Best Rated "A" or "A+" carrier, and must be satisfactory to the attorney for the school district. The performance bond shall be executed by the successful bidder at the time of the execution of the contract by the successful bidder and the board.
- 21. Each bidder shall include with his bid, a bid bond or certified check in the amount of five percent (5%) of his total bid, drawn in favor of the Board of Education. Such checks or bonds will be returned to unsuccessful bidders as soon as contracts are signed or purchase orders acknowledged by the successful bidders. Bid deposits of successful bidders will be returned upon the satisfactory completion of the contract.

SAMPLES

- 22. All specifications are minimum standards; and accepted bid samples do not supersede specifications for quality unless bid sample is superior, in which case deliveries must be the same identity and quality as accepted bid sample.
- 23. The school district reserves the right to request a representative sample of the item quoted upon either prior to the award or before shipments are made. If the sample is not in accordance with the requirements of the specification, the school district may reject the bid; or, if award has been made, cancel the contract at the expense of the successful bidder.

- Samples, when required, must be submitted strictly in accordance with instructions; otherwise, bid may not be considered. If samples are requested subsequent to bid opening, they shall be delivered within ten (10) days of the request, or as directed, for bid to have consideration. Samples must be furnished free of charge and must be accompanied by descriptive memorandum invoices indicating if the bidder desires their return and specifying the address to which they are to be returned provided they have not been used or made useless by tests. Award samples may be held for comparison with deliveries. The school district will not be responsible for any samples destroyed or mutilated by examination or testing. Samples shall be removed by the bidder at his expense. Samples not removed within fifteen (15) days after written notice to the bidder will be regarded as abandoned and the school district shall have the right to dispose of them as its own property.
- When a specification indicates that an item to be purchased is to be equal to a sample, such sample will be on display at a designated location in the school district. Failure on the part of the bidder to examine sample shall not entitle him to any relief from the conditions imposed in the proposal, specification, etc.

AWARD

Awards will be made to the lowest responsible bidder, as will best promote the public interest, taking into consideration the reliability of the bidder, the quality of the materials, equipment or supplies to be furnished, their conformity with the specifications, the purposes for which required, and the terms of delivery.

- 26. The school district reserves the right to reject all bids. Also reserved is the right to reject, for cause, any bid in whole or in part; to waive technical defects, qualifications; irregularities; and omissions if in its judgment the best interests of the district will be served. Also reserved is the right to reject bids and to purchase items on State contract if such items can be obtained on the same terms, conditions, specifications and at a lower price.
- 27. No contract becomes binding until the necessary funds have been approved for the fiscal year during which the contract is in effect.
- 28. This bid will be utilized on an "as needed" basis. There is no guarantee that any/all of the products listed will be purchased.
- 29. The school district reserves the right to make awards within (45) days after the date of the bid opening during which period bids may not be withdrawn unless the bidder distinctly states in his bid that acceptance thereof must be made within in a shorter specified time.
- 30. Where a bidder is requested to submit a bid on individual items and also on a total sum or sums, the right is reserved to award bids on individual items or on total sums.

- 31. Each bid will be received with the understanding that the acceptance thereof in writing by the school district, approved by the board of education, to furnish any or all of the items described therein shall constitute a contract between the successful bidder and the school district. Contract shall bind the successful bidder on his part to furnish and deliver at the prices and in accordance with the conditions of his bid. Contract shall bind the school district on its part to order from such successful bidder (except in the case of emergency) and to pay for at the contract prices, all items ordered and delivered, within 10 (ten) per cent over or under the award quantity, unless otherwise specified.
- 32. The placing in the mail of a notice of award or purchase order to a successful bidder, to the address given in his bid, will be considered sufficient notice of acceptance of contract.
- 33. If the successful bidder fails to deliver within the time specified, or within reasonable time as interpreted by the school district, or fails to make replacement of rejected articles, when so requested, immediately or as directed by the school district, the school district may purchase from other sources to take the place of the items rejected or not delivered. The school district reserves the right to authorize immediate purchase from other sources against rejections on any contract when necessary. On all such purchases the successful bidder agrees to reimburse the school district promptly for excess costs occasioned by such purchases. Should the cost be less, the successful bidder shall have no claim to the difference. Such purchases will be deducted from contract quantity.
- 34. A contract may be canceled at the successful bidder's expense upon non-performance of contract.
- 35. If the successful bidder fails to deliver as ordered, the school district reserves the right to cancel the contract and purchase the balance from other sources at the successful bidder's expense.
- 36. Cancellation of contract for any reason may result in removal of the successful bidder's name from mailing list for future proposals for an indeterminate period.
- When materials, equipment or supplies are rejected, they must be removed by the successful bidder from the premises of the school district within five (5) days of notification. Rejected items left longer than five (5) days will be regarded as abandoned, and the school district shall have the right to dispose of them as its own property.
- 38. No items are to be shipped or delivered until receipt of an official order from the school district.
- 39. It is mutually understood and agreed that the successful bidder shall not assign, transfer, convey, sublet or otherwise dispose of the contract or his right, title, or interest therein or his power to execute such contract, to any other person, company or corporation without the previous written consent of the school district.

INSTALLATION OF EQUIPMENT

- 40. The successful bidder shall clean up and remove all debris and rubbish resulting from his work from time to time as required or directed. Upon completion of the work, the premises shall be left in a neat, unobstructed condition, the buildings broom cleaned and everything in perfect repair and order. Old materials are the property of the successful bidder unless otherwise specified.
- 41. Equipment, supplies and materials shall be stored at the site only on the approval of the school district and at the successful bidder's risk. In general, such on-site storage should be avoided to prevent possible damage or loss of the material.
- 42. Work shall be progressed so as to cause the least inconvenience to the school district and with proper consideration for the rights of other successful bidders or workmen. The successful bidder shall keep in touch with the entire operation and install his work promptly.
- 43. Bidders shall acquaint themselves with conditions to be found at the site and shall assume all responsibility for placing and installing the equipment in the locations required.
- 44. Equipment for trade-in shall be dismantled by the successful bidder and removed at their expense. The condition of the trade-in equipment at the time it is turned over to the successful bidder shall be the same as covered in the specifications, except as affected by normal wear and tear from use up to the time of trade-in. All equipment is represented simply "as is". Equipment is available for inspection only at the delivery point listed for new equipment, unless otherwise specified.

GUARANTEES BY THE SUCCESSFUL BIDDER

- 45. The successful bidder guarantees:
 - a. His products against defective material or workmanship and to repair or replace any damages or marring occasioned in transit.
 - b. To furnish adequate protection from damage for all work and to repair damages of any kind for which he or his workmen are responsible, to the building or equipment, to his own work, or to the work of other successful bidders.
 - c. To carry adequate insurance to protect the school district from loss in case of accident, fire, theft, etc.
 - d. That all deliveries will be equal to the accepted bid sample.
 - e. That the equipment or furniture offered is standard, new, latest model of regular stock product or as required by the specifications, with parts regularly

used for the type of equipment or furniture offered; also that no attachment or part has been substituted or applied contrary to manufacturer's recommendations and standard practice. Every unit delivered must be guaranteed against faulty material and workmanship for a period of at least one year from date of delivery. If during this period such faults develop, the successful bidder agrees to replace the unit or the part affected without cost to the school district.

Any merchandise provided under the contract which is or becomes defective during the guarantee period shall be replaced by the successful bidder free of charge with the specific understanding that all replacements shall carry the same guarantee as the original equipment (one year from the date of acceptance of the replacement). The successful bidder shall make any such replacement immediately upon receiving notice from the school district.

- 46. Delivery must be made as ordered and in accordance with the proposal and specification. If delivery instructions do not appear on order, it will be interpreted to mean prompt delivery (not to exceed 30 days). The decision of the school district as to reasonable compliance with delivery terms shall be final. Burden of proof of delay in receipt of order shall rest with the successful bidder. Failure to deliver because of delayed payments or for any other reason except that described in Paragraph 52 will be cause for open market purchase at the expense of the successful bidder.
- 46. The school district will not schedule any deliveries for Saturdays, Sundays or legal holidays, except commodities required for daily consumption or where the delivery is an emergency, a replacement or is overdue, in which event the convenience of the school district shall govern.
- 47. Items shall be securely and properly packed for shipment, storage and stocking in new shipping containers and according to accepted commercial practice, without extra charge for packing case, bailing or sacks.
- 48. The successful bidder shall be responsible for delivery of items in good condition at point of destination. He shall file with the carrier all claims for breakage, imperfections and other losses, which will be deducted from invoices. The receiving school district will note for the benefit of successful bidder when packages are not received in good condition.
- 49. Unless otherwise stated in the specifications, all items must be delivered into and placed at a point within the building as directed by the shipping instructions or the agent for the school district. The successful bidder will be required to furnish proof of delivery in every instance.
- 50. Unloading and placing of the equipment and furniture is the responsibility of the successful bidder, and the school district accepts no responsibility for unloading and placing of equipment. Any cost incurred due to the failure of the successful

bidder to comply with this requirement will be charged to him. No help for unloading will be provided by the school district, and suppliers should notify their truckers accordingly.

51. All deliveries shall be accompanied by delivery tickets or packing slips. Tickets shall contain the following information for each item delivered:

Purchase Order Number Name of Article Item Number Quantity Name of the successful bidder

Carton shall be labeled with purchase order, successful bidder's name and general statement of contents. Failure to comply with this condition shall be considered sufficient reason for refusal to accept the goods.

PAYMENTS

- 52. Payment for the used portion of an inferior delivery will be made by the school district on an adjusted price basis.
- 53. Payment will be made only after correct presentation claim forms obtained from the ordering school district.
- 54. Payments of any claim shall not preclude the school district from making claim for adjustment on any item found not to have been in accordance with general conditions and specifications.

SAVING CLAUSE

55. The successful bidder shall not be held responsible for any losses resulting if the fulfillment of the terms of the contract shall be delayed or prevented by wars, acts of public enemies, strikes, fires, floods, acts of God or for any other acts not within the control of the successful bidder and which by the exercise of reasonable diligence he is unable to prevent.

LEGAL

56. Any bidder, whether successful or unsuccessful, shall reimburse the school district for all costs, disbursements and attorneys' fees incurred in connection with any lawsuit, claim, cause of action, etc. which is frivolous, untenable or otherwise without a good faith basis and related to the bidding process or the subject thereof.

ROCKY POINT UNION FREE SCHOOL DISTRICT SEALED PROPOSALS FOR Bid #22-04 IN-CAR DRIVER EDUCATION

SCOPE

The Rocky Point Union Free School District is soliciting bids for <u>IN-CAR DRIVER EDUCATION</u> for its Driver and Traffic Safety Education program. Bidders shall provide a single all-inclusive per student price for the provision of all requirements as described herein.

BID SPECIFICATIONS

1. General:

Sealed bids for IN-CAR DRIVER EDUCATION in conformity with the attached specifications for the Rocky Point Union Free School District are invited as per the legal advertisement in Long Island Business News and The Times Beacon Record. The bidders will familiarize themselves with any conditions and factors that they may encounter in connection with the work affecting this contract. The bidder, in submitting this proposal, declares that he/she has personally satisfied himself/herself as to quantities, conditions, schedules, etc., and understands that in submitting this proposal he/she waives all rights to plead any misunderstanding regarding the same. No bid will be withdrawn pending award of contract, which if made, will be within sixty (60) days after opening of bids.

Successful bidder must be prepared to present evidence of ability, facilities, and financial standing necessary to meet satisfactorily the requirement set forth, or implied, in this bid. The decision on the suitability of a bidder's ability, facilities, and financial standing, shall be the sole prerogative of the Board of Education, and their ruling shall be final.

The School District reserves the right to make such additions, deductions, or changes as it deems necessary, and this contract shall in no way be invalidated thereby and no claim shall be made by the bidder for any loss of anticipated profits because of any such change, or by reason of any variation between the approximate quantities. The Board of Education reserves the right to reject any or all bids submitted, and to waive any informality in any bid, and shall further make awards in any way it deems advisable to the best interest of the School District.

Iran Divestment Act-Bidder/Contractor (or any assignee) certifies that it is not on the "Entities Determined To Be Non-Responsive Bidders/Offerers Pursuant to The New York State Iran Divestment Act of 2013" list ("Prohibited Entities List") posted on the OGS website at: http://www.ogs.ny.gov/about/regs/docs/ListofEntities.pdf and further certifies that it will not utilize on such Contract any subcontractor that is identified on the Prohibited Entities List. Additionally, Bidder/Contractor is advised that should it seek to renew or extend a Contract awarded in response to the solicitation, it must provide the same certification at the time the Contract is renewed or extended.

During the term of the Contract, should Rocky Point UFSD receive information that a person (as defined in State Finance Law 165-a) is in violation of the above-referenced certifications, Rocky Point UFSD will review such information and offer the person an opportunity to respond. If the person fails to demonstrate that it has ceased its engagement in the investment activity which is in violation of the Act within 90 days after the determination of such violation, then Rocky Point UFSD shall take such action as may be appropriate and provided for by law, vile, or contract, including, but not limited to, seeking compliance, recovering damages, or declaring the Contractor in default.

ROCKY POINT UNION FREE SCHOOL DISTRICT SEALED PROPOSALS FOR Bid #22-04 IN-CAR DRIVER EDUCATION

COVID-19 Mitigation Plan

(See Number 4 on page 16)

- 1) ALL CAR OCCUPANTS MUST WERR a FACEMASI
- 2) Instructors will supply A MASK to Any Student who alkives without one
- 3) Before the start time, all cans will have been throughly cleaves and disinfected with Alcohol wipe 4) After each streat drives the steering wheel,
- gene shift, Dashboard, And seat will again be wipe
- down with alcoholwipes

 5) Instructors will check their temperatures before fearing
- Instructors must report immediately any unwell feeling to the MAIN office
- CAR WINDOWS will be left partially open FOR Improved Aleflow.
- Any positive could-19 positive will be immediately sent to BNAN SACKS.
- The MAIN Office AND the INSTRUCTOR WIll ASSIST IN 9) All Contact traging efforts
- 10) All Students will be temperatore checked by 9 thermovator supplied by the district. Any street

ROCKY POINT UNION FREE SCHOOL DISTRICT SEALED PROPOSALS FOR Bid #22-04 IN-CAR DRIVER EDUCATION

COVID-19 Mitigation Plan

(See Number 4 on page 16)

II) Any student showing other substantial courd-19 Symptions, cough, heed ache, chills etc May be sent inside the school For Forther evaluation. Rocky Point UFSD reserves the right to reject any bid, request for assignment, renewal or extension for an entity that appears on the Prohibited Entities List prior to the award, assignment, renewal or extension of the contract, and to pursue a responsibility review with respect to any entity that is awarded a contract and appears on the Prohibited Entities list after contract award.

2. Bid Price:

The contract will be awarded to the lowest responsible bidder for the period stated herein and will remain fixed for the term of this contract. No adjustment higher than original contract price will be made because of any error in estimate of work by bidder.

The per student fee, as bid by the contractor, shall include all costs of furnishing necessary qualified instructors, equipment, and consumables (fuel, oil, etc.) for the complete school year as specified herein. No allowance shall be made for extras.

If the bidder claims that any instructions given to him/her involve extra cost or extension of time, he/she shall, within five (5) days and in any event before proceeding to execute the classes, submit his/her protest thereto, in writing, to the Assistant Superintendent for Business, stating the basis of his/her objections. No claim shall be valid unless so made.

3. Bid Instructions:

Bidder may not change the "Bid Form." Bidder must quote a separate price for each item, and prices, as bid, must be all-inclusive. Any additions or deletions to the "Bid Form" may result in the bid being considered non-responsive.

It is understood that the vehicles used under this agreement are in good condition at the time of acceptance, and in complete conformity with New York State regulations. Immediately upon notice, the bidder shall fully make good any defects affecting the performance of the car(s) without cost to the District.

Bidder shall submit, with his bid, a copy of his current New York State Department of Motor Vehicles Driving School License.

All driving instructors must be New York State certified to teach IN-CAR DRIVER EDUCATION. The successful bidder must present copies of every driving instructor's certification (DMV-524) and Driver's License whom they employ along with the appropriate insurance certificates when requested by the School District. A list of driving school vehicles (DMV-527) must be submitted with bid.

Bidder must sign and notarize the required printed forms- STATEMENT OF BIDDER'S QUALIFICATIONS, NON-COLLUSIVE BIDDING CERTIFICATION, AFFIDAVIT OF COMPLIANCE, and IRAN DIVESTMENT ACT CERTIFICATION.

4. COVID-19 Mitigation Plan

Please include your COVID-19 Mitigation Plan with your bid. This should include items such as:

- Requirement of mandatory face coverings
- Cleaning & disinfection program of all vehicles
- Health screenings of driver instructors
- Car windows open for improved air flow
- How will COVID-19 positive case(s) for vendor's instructors be relayed to the District and how vendor would assist in Contract Tracing efforts.
- Other mitigations, protocols, etc.

5. Bonding:

The successful bidder may be required to furnish a performance bond and completion bond in an amount equal to five (5%) percent of the bid price, in form and with a surety of sureties to the Board of Education.

6. Cancellation:

All classes given under this contract are to be performed under the conditions outlined in specifications. The School District reserves the right, in its sole discretion, to terminate the contract to be awarded under this bid upon thirty (30) days' notice. District liability at such termination will be determined on a prorated basis.

7. Specific Insurance Requirements:

The successful bidder must provide within five (5) working days from notification of pending award, a certificate of insurance naming Rocky Point Union Free School District as being additionally insured for liability in the amount of \$1,000,000 combined single limit for bodily injury and property damage and \$2,000,000 aggregate limit as well as the Additional Insured Endorsement; Workers' Compensation coverage to all employees as required by Workers' Compensation Law of the State of New York and Employer's Liability of \$1,000,000 limit; Automotive Liability in the amount of \$1,000,000 combined single limit; and Umbrella Liability in the amount of \$3,000,000. Insurance shall be provided by an insurance company licensed as an "admitted carrier" by the State Insurance Department and shall be Best "A" rated. This policy is to be reviewed by Rocky Point Union Free School District and be subject to its approval. Coverage shall be obtained prior to the start of service and maintained throughout the life of the contract.

The Certificate of Insurance kept on file with the District must have an automatic Department of Motor Vehicles notification for any lapses in coverage.

Workers Compensation Insurance: Proof of insurance as required under New York State.

The contractor agrees to indemnify and release and hold harmless the Board of Education of the Rocky Point School District, its agents and employees from all claims of loss or damage to persons or property arising within the course of the contractor's contract of duties.

8. School Property Damage:

It is herein understood and agreed that the successful bidder must guard against and prevent causing any damage to R.P. School District property of any nature. If the bidder or their employee should do any damage to R.P. School District property, the bidder is responsible to repair or replace the damaged area to its original condition and to the satisfaction of the R.P. School District at the successful bidders own expense. If the successful bidder fails to make such repairs upon notice from the R.P. School District, then the School District shall direct this work to be done and charge cost of same to the successful bidder by deducting the cost from any payments that may be due the successful bidder.

Motor Vehicle Accident:

In the event of an accident, contractor shall immediately inform the School District. Contractor shall complete and file any accident reports within 48 hours after any accident, as required by NYS law, the Department of Motor Vehicles, and the insurance carriers for the contractor and the School District. Copies of all completed forms and reports shall be furnished to the School District immediately upon filing. The Contractor will cooperate with the School District in the investigation of any accident.

10. Labor Requirements:

The bidder awarded the bid for IN-CAR DRIVER EDUCATION under these specifications must comply with Section 220-E of the New York State Labor and Education Laws, and Regulations governing schoolwork.

11. Driving Instructors:

All IN-CAR DRIVING INSTRUCTORS must be recommended by the successful bidder and approved by the School District.

All driving instructors must be New York State certified to teach IN-CAR DRIVER EDUCATION.

Instructors shall be required to dress professionally and to observe appropriate demeanor with students and staff. No smoking shall be permitted on school grounds or in any vehicle at any time.

The Rocky Point UFSD reserves the right, in its sole discretion, to remove any IN-CAR DRIVING INSTRUCTOR at any time without question or prior notice. It is expected and considered the responsibility of the awarded driving school to use whatever available legal methods are necessary to ensure to the School District that all driving instructors in their employ HAVE NOT BEEN convicted or charged with any felony or misdemeanor. If an employee is charged during the term of this contract, it is expected that the driving school will immediately replace the driving instructor. Failure to report and replace any instructor will result in loss of this awarded contract and possible further legal action.

The successful company will provide qualified substitute vehicles and instructors. Instruction must take place each day it is scheduled.

12. <u>Vehicle(s):</u>

All vehicles used in the program will be dual controlled and safety equipped in accordance with Department of Motor Vehicles regulations. All New York State regulations for a driver-education car must be met. All vehicles will be appropriately maintained with a detailed record of service and may not be older than five (5) model years. All staff will be appropriately licensed in accordance with Department of Motor Vehicles regulations.

At times, handicapped students may desire to participate in the drivers' training program, requiring the use of special equipment, i.e.: Hand Controls, Large Mirrors. The instruction will be given within one of the estimated groups. The contractor will be notified regarding special needs should the occasion arise. It is expected that the students can qualify for an operator's license upon successfully completing the New York State Motor Vehicle Department's examinations.

For each vehicle intended for use in the District's Driver and Traffic Safety Education Program, the bidder shall submit on the Vehicle Fleet Information form the following: Make, Model, Year, and VIN.

13. References:

All bidders shall submit a list of not less than three (3) School Districts where IN-CAR DRIVER EDUCATION, as specified, has been given during the past twenty-four (24) months. Such references are to be listed on the attached bid submittal form.

14. Payment and Award Period:

Payment will be made per semester based on the bid award. Period of Agreement: ONE (1) YEAR, beginning July 1, 2021 through June 30, 2022. This bid may be extended for two (2) additional one-year periods at the same terms and conditions upon mutual written agreement between the District and the successful bidder.

15. Students:

Bidders are requested to submit a price-per-student bid for providing IN-CAR DRIVING INSTRUCTION on public roads for a minimum of thirty (30) students for the summer, fall and spring semesters (120), to an estimated maximum of two hundred fifty-six (256) students per school year. There shall not be more than four (4) students and not less than two (2) students per vehicle, with a minimum of two (2) cars per session for afterschool sessions. Only students enrolled in the program will be allowed to ride in the vehicles. All student absences will be "made up" during a make-up week or at another mutually convenient time. attendance will be reported to the School District's representative. 16. Program Hours:

School Year (Fall & Spring): Approx. 120-192 students	(2-3 cars per session)
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Sessions: 2 days/week	Tues & Thurs*:	1:45pm-3:15pm
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3:15pm-4:45pm

Saturday: 7:30am-9:00am

9:00am-10:30am 10:30am-12:00pm 12:00pm-1:30pm

*days subject to change

Summer (July & August): Approx. 60-100 students (2-3 cars per session)

Session I: 4 days/week Mon, Tues, Wed & Thurs 7:30am-9:00am

> 9:00am-10:30am 10:30am-12:00pm 1:30pm-3:00pm

Session II: 4 days/week Mon, Tues, Wed & Thurs 7:30am-9:00am

9:00am-10:30am 10:30am-12:00pm 12:00pm-1:30pm** 1:30pm-3:00pm

17. Curriculum:

It is expected that this IN-CAR INSTRUCTION will give each student the minimum amount of knowledge and experience as required by New York State law so that the student can qualify for an operator's license.

The curriculum will focus on defensive driving techniques and it will include the demonstration of emergency procedures. The driving instructor will follow the prescribed curriculum as outlined by the New York State Education Department-Safety Education Unit. The in-car program will be conducted in conjunction with the lecture phase of the program to provide smooth articulation between the two phases of the program.

The successful bidder will provide each student with a minimum total of six (6) hours actual behind-the-wheel driving instruction, and a minimum of eighteen (18) hours of driving training. Note that students will concurrently be receiving classroom instruction consisting of lecture and written textbook work from a certified New York State Driver Education teacher provided by the School District.

^{**}Potential Classroom Lection time. Session II hours TBD once classroom lecture time is finalized.

The successful bidder will maintain a student record card provided by the School District for each student.

The driving school instructor must submit his/her evaluation of each student's driving ability to the School District within three (3) days of the end of each marking period, with a final mark given at the end of the instructional period. The driving instructor must submit a record indicating the time each student spent behind the wheel, and observation of each session.

18. Location:

All driving classes must commence and finish at the Rocky Point High School or Rocky Point Middle School, as designated. All students must be picked up at the High School/Middle School and dropped off at the High School/Middle School. Under no circumstances are any students to be picked up or dropped off at any other location. It shall be the responsibility of the contractor to notify the Coordinator of Community Services if cars will not be at the required locations on time.

The cars will be utilized 100% for instructional purposes. No stops will be permitted for the purchasing of gas or coffee during class time (in car).

ROCKY POINT UNION FREE SCHOOL DISTRICT SEALED PROPOSALS FOR Bid #22-04 IN-CAR DRIVER EDUCATION

BID SUBMITTAL FORM: BID #22-04 IN-CAR DRIVER EDUCATION

To: Rocky Point Union Free School District Administrative Office

90 Rocky Point-Yaphank Road

Rocky Point, NY 11778

The undersigned agrees to furnish <u>IN-CAR DRIVER EDUCATION INSTRUCTION</u> as described with full compliance to all terms, conditions and qualifications as stated herein. The undersigned further states that as of this date, no driving instructor in his or her employ has been charged or convicted of any felony or misdemeanor.

PRICE PER STU	DENT	\$ 395.00
	CE for a minimum of the period 7/1/21 through	\$ 43 200.00 47,400
Company Name:	Suffolk AutoD	NIVINO SCHOOL
Submitted by:	An THON	V C.RULO

Submitted by:

ANTHONY C, RILLO

Title:

GENERAL MANAGEL

Address:

30 VERNON VALLEY ROAD F. Northport NY 1173/

Telephone:

631-544-1109

Signed:

Date:

3/9/11

ROCKY POINT UNION FREE SCHOOL DISTRICT SEALED PROPOSALS FOR Bid #22-04 IN-CAR DRIVER EDUCATION

VEHICLE FLEET INFORMATION

MAKE	MODEL	YEAR	VIN
Hywoni	SONATA	2018	5NPE24AF9JH614642
NISSAN	ALTIMA	2017	INYAL3AP34C485/62
CHRYSLER	200	2016	1C3CCCAB2EN116470
CHRYSLER	200	2015	1C3 CCCAB IF NSO4711
CHRYSLER	200	2015	1C.3CCCABOFN559814
HONDA	ACCORD	2015	1HGCR2F39FA083402
HYUNDAY	SONATA	2015	SWPE34AF9FH095371
HONDA	ACCORD	2014	14GCR2F36EA018157
HONDA	Accord	2014	IHGCR2F32EAEA211316

Company Name:	- SUFFOLK AUTO DRIVING SCHOOL
Submitted by:	ANTHONY CIRILLO
Title:	GENERAL MANAGER
Address:	30 VERNON VAlley ROAD E. North part NY 11731
Telephone:	631-544-1100
Signed:	- Giloalb
Date:	3/9/21
	——————————————————————————————————————

ROCKY POINT UNION FREE SCHOOL DISTRICT SEALED PROPOSALS FOR Bid #22-04 IN-CAR DRIVER EDUCATION

REFERENCE FORM

REFERENCE SUFFORK COUNTY DENNYS KRAMER 631-472-7800 EXT 5011

REFERENCE SUFFORK COUNTY DENNYS KRAMER 631-926-7940

COMMUNITY COLLEGE

REFERENCE GERSH ACADEMY TOEL GELLER 631-416-7224

REFERENCE WEST ISLIP TIM HORAN 631-930-1540

REFERENCE LONGWOOD TERRI HEINRICHS 631-345-2860

REFERENCE COMMARK MATT-Keltos 631-926-6712

STATEMENT OF BIDDER'S QUALIFICATIONS (Page 1 of 2)

1. Name of Bidder (Company Name)

SUFFOLK AUTO DRIVING SCHOOL

Dec 1990 New York

For how many years has the bidder done business under its present name?

2. If the bidder is a corporation, state the date and place of incorporation of the Corporation.

	30 YEARS
4.	List the persons who are directors, officers, owners, managerial employees or partners in the bidder's business. JOSEPH CURATOLO - PRESIDENT + OWNER ANTHONY CIRILLO - GENERAL MANAGER CATHERINE BARTH - ASSISTANT MANAGER
5a.	Have any of the persons listed in Number 4 owned/operated/been shareholders in any other companies?
5b.	If the answer to number 5a is in the affirmative, list said persons and the names of their previous affiliations. JOSEPH CURATOLO - TWIN COUNTY DRIVING SCHOOL ANTHONY CIRILLO - TWIN COUNTY DRIVING SCHOOL CATHERINE BARTH - TWIN COUNTY DRIVING SCHOOL Has any director, officer, owner or managerial employee had as a significant of the significant of the said of the significant of the significa
6.	Has any director, officer, owner or managerial employee had any professional license suspended or revoked? If the answer to this question is yes, list the name of the individual, the professional license he/she formerly held, whether said license was revoked or suspended and the date of the revocation or suspension.
	During the five year period preceding the submission of this bid, has the bidder been charged with any claims pertaining to the unlawful intimidation or discrimination against any employee by reason of race, creed, color, disability, sex or natural origin and/or violations of an employee's civil rights or equal employment opportunities? If the answer to this question is yes, list the persons making such claim against the bidder, a description of the claim, the status of the claim, and what disposition (if any) has been made regarding such claim.

STATEMENT OF BIDDER'S QUALIFICATIONS (Page 2 of 2)

8. During the five year period preceding the submissions of this bid, has the bidder been named as a party in any lawsuit in an action involving a claim for personal injury or wrongful death arising from performance of work related to any contract in which it has been engaged? If the answer to this question is yes, *list* all such lawsuits, the index number associated with said suit and the status of the lawsuit at the time of the submission of this bid.

No

9. During the five year period preceding the bidder's submission of this bid, has the bidder been the subject of proceedings involving allegations that it violated the Workers' Compensation Law including but not limited to the failure to provide proof of worker's compensation or disability coverage and/or any lapses thereof. If the answer to this question is yes, list each such instance of violation and the status of the claimed violation at the time of the submissions of this bid.

NO

10. Has the bidder, its officers, directors, owner and/or managerial employees been convicted of a crime or been the subject of a criminal indictment during the five years preceding the submission of the proposal? If the answer to this question is yes, list the name of the individual convicted or indicted, the charge against the individual and the date of disposition of the charge.

NO

11. In how many School Districts has the bidder concurrently (simultaneously) provided Driver and Traffic Safety Education?

Signed

Sworn to before me this

aay or ______

Notary Signature

**CNNA PALLADINO- PESCE Notary Public State of Law York 1:24-4835897

Qualifie I in Suffolk County

My Commission Expires September 30, 222

AFFIDAVIT OF COMPLIANCE

STATE OF NEW YORK

COUNTY OF	SULFO	11

boy Cirllo, being duly sworn, deposes and says:

- 1) That (s)he is an officer or representative of Suffolic Auto DQIVING SCHOOL and that (s)he has the authority to sign this affidavit.
- This affidavit is offered as an inducement to the Rocky Point Union Free School District to award to SUPFOLK AUTO DRIVING SCHOOL such purchase contracts for goods or services as directed by the Board of Education, in accordance with New York State law and with District policy.
- 3) That no Officer, Employee or Stockholder of the above referenced vendor is an Employee, in any position, Administrator or Board Member at the Rocky Point Union Free School District other than as disclosed
- That no Officer, Employee or Stockholder of the above-referenced vendor is related to an employee in any position, administrator or Board Member, at the Rocky Point Union Free School District other than as disclosed below:

Vendor: List Officer, Employee or Stockholder's Name	Position with Vendor	Rocky Point UFSD Employee, Administrator or Board Member Name	Relationship between parties
	Λ		
	Signed Signed	Dat	3/9/4 ie

BONNA PALLADINO-PE . 5 Notary Public State of Lay You 1 24-4835697

Qualitica in Suffolk County My Commics: Expires September an & Z

Seal

ROCKY POINT UNION FREE SCHOOL DISTRICT NON-COLLUSIVE BIDDING CERTIFICATION

Chapter 751 of the Laws of 1965 amended Section 103-d of the General Municipal Law required that every bid or proposal submitted to a political sub-division of New York State must contain the following certification properly signed and executed:

The undersigned herby certifies that:

- a. This bid or proposal has been independently arrived at without collusion with any other bidder with any competitor or potential competitor;
- This bid or proposal has not been knowingly disclosed and will not be knowingly disclosed, prior to the opening of bids or proposals for this project, to any other bidder, competitor or potential competitor;
- c. No attempt has been or will be made to induce any other person, partnership or corporation to submit or not to submit a bid or proposal;
- d. The person signing this bid or proposal certifies that he has fully informed himself regarding the accuracy of the statements contained in this certification, and under the penalties of perjury, affirms the truth thereof, such penalties being applicable to the bidder as well as to the person signing in its behalf.

e. .	The attached hereto (execution of this ce corporate bidder.	if a corporate bidder) is a certified copy of resolution authorizing the ortificate by the signator of this bid or proposal in behalf of the Signature
		Title

RESOLUTION-for corporate bidders only

RESOLVED that ANTHONY C1R ILLO be authorized to sign and submit the bid or proposal of this corporation for the following project
IN-CAL INSTAUCTURAL EDUCATION
and to include in such bid or proposal the certificate and to include in such bid or proposal the certificate and to include in such bid or proposal the certificate and to include in such bid or proposal the certificate and to include in such bid or proposal the certificate and to include in such bid or proposal the certificate and to include in such bid or proposal the certificate and to include in such bid or proposal the certificate and to include in such bid or proposal the certificate and to include in such bid or proposal the certificate and to include in such bid or proposal the certificate and to include in such bid or proposal the certificate and to include in such bid or proposal the certificate and the cer
three-d of the General Municipal Law as the act and deed of such corporation, and for any inaccuracies or misstatements in such certificate this corporate bidder shall be liable under the penalties of perjury.
The foregoing is a true and correct conv of the resolution adapted to the foregoing is a true and correct conv of the resolution adapted to the foregoing is a true and correct conv of the resolution adapted to the foregoing is a true and correct conv of the resolution adapted to the foregoing is a true and correct conv of the resolution adapted to the foregoing is a true and correct conv of the resolution adapted to the foregoing is a true and correct conv of the resolution adapted to the foregoing is a true and correct conv of the resolution adapted to the foregoing the foregoing to the foregoing to the foregoing to the foregoing the foregoing to the foregoing
Corporation at a meeting the 18th day of MARCH 2021 and is still in full force and effect on this
Sear of the Corporation Secretary

CERTIFICATION OF COMPLIANCE WITH THE IRAN DIVESTMENT ACT

As a result of the Iran Divestment Act of 2012 (the "Act"), chapter 1 of the 2012 Laws of New York, a new provision has been added to Stat Finance Law (SFL) § 165-a and New York General Municipal Law § 103-g, both effective April 12, 2012. Under the Act, the Commissioner of the Office of General Services (OGS) will be developing a list of "persons" who are engaged in "investment activities in Iran" (both are defined terms in the law) (the "Prohibited Entities List"). Pursuant to SFL § 165-a(3)(b), the initial list is expected to be issued no later than 120 days after the Act's effective date at which time is will be posted on the OGS website.

By submitting a bid in response to this solicitation or by assuming the responsibility of a Contract awarded hereunder, each Bidder/Contractor, any person signing on behalf of any Bidder/Contractor and any assignee or subcontractor and, in the case of a joint bid, each party thereto, certifies, under penalty of perjury, that once the Prohibited Entities List is posted on the OGS website, that to the best of its knowledge and belief, that each Bidder/Contractor and any subcontractor or assignee is not identified on the Prohibited Entities List created pursuant to SFL §165-a(3)(b).

Additionally, Bidder/Contractor is advised that once the Prohibited Entities List is posted on the OGS Website, any Bidder/Contractor seeking to renew or extend a Contract or assume the responsibility of a Contract awarded in response to this solicitation must certify at the time the Contract is renewed, extended or assigned that it is not included on the

During the term of the Contract, should the School District receive information that a Bidder/Contractor is in violation of the above-referenced certification, the School District will offer the person or entity an opportunity to respond. If the person or entity fails to demonstrate that he/she/it has ceased engagement in the investment which is in violation of the Act within 90 days after the determination of such violation, then the School District shall take such action as may be appropriate including, but not limited to, imposing sanctions, seeking compliance, recovering damages or declaring the Bidder/Contractor in default. The School District reserves the right to reject any bid or request for assignment for a Bidder/Contractor that appears on the Prohibited Entities List prior to the award of a contract and to pursue a responsibility review with respect to any Bidder/Contractor that is awarded a contract and subsequently appears on the

I, ANTHONY CIRILLO	, being duly sworn, deposes and says that he/she is the
GENERAL MANAGER of the SUFFOLK	Privile School Corporation and that neither
Bidder/Contractor nor any proposed subsontractor is identified	on the Prohibited Entition 1 ist
	ou die Pomoned Emples List.
SIGNED	
SWORN to before me this	
g day of Maye	
20 21	Votary Public State of Law York Quality 24-483569/
Notary Public:	Qualific 1 in Suffolk County My Committee: Expires September 30 and

580209 (SED CODE)			T
			Form TC
(SED CODE)	The State Education	-	
	Transportation Unit, 1		C
	Albany, New Yo	rk 12234	Contract Number (SED will fill in)
	TRANSPORTATION	CONTRACT	Emergency Contract
(Do not us	e for Addendums or Exten	sions - See Note on R	Reverse) Charter Trips
Christopher Van Cott	Tele() 631-849-7564 Fax() 631-849-7556	Check if applicable () Special Ec	e: ducation Pupils - Transportation required
Assistant Superintendent for I Union Free School District		year and c	ed service. vill begin part way through the school cost \$10,000 or less. h emergency contract -31 Calendar Days.
90 Rocky Point Yaphank Road		() Contract for () District wi	or bus maintenance only. ill supply contractor with fuel.
Street or P.O.	Box	Specifications inclu	
Rocky Point, New York 11778	;		for attendants, escorts or monitors. increasing or decreasing service.
City State	Zip Code		
Rocky Point Union Free School District or BOCE	S)	, County of	
party of the first part and Mon	tauk Bus LLC	···	, party of the second part.
2021, 2503, 4401 and 4402 of the Edu children of said district for the period of 04/21/21 Month Day	ucation Law) to enter into a of service to begin and to end	Contract for the purpo 05/21/21 Onth Day	provisions of Section 1604, 1709, ose of providing transportation for Year said party of the second part the
sum of \$(If lump sum contract)	or \$ See attached (Unit		a per-bus, per-diem, per-mile or
other unit cost basis for providing such	n transportation on a suitable	conveyance.	
Total Anticipated Annual Cost \$\$1	10,000.00	·	
If awarded through a request f	or proposals, date of request	of such proposals	(see note on reverse)
IN WITNESS WHEREOF, The Rock	xy Point UFSD 90 Ro	• •	nk Rd., Rocky Point, NY 11
	ontauk Bus LLC. 209 Wadi	•	,

COMPLIANCE CERTIFICATION. I certify that this contract was awarded in accordance with the competitive bidding provisions of Section 103 of the General Municipal Law, Section 305 (14) of the Education Law, and Section 156.1(b) of Commissioner of Education Regulations, or in accordance with the request for proposals provisions of Section 305(14) of the Education law and Section 156.12 of Commissioner of Education Regulations. I also certify that this contract has been authorized by the voters in accordance with Section 1709(27) of the Education Law, and has been approved by the Superintendent of Schools in accordance with Section 3625(1) of the Education Law.

Approval Date:

(Date of Superintendent's Approval)

(Signature of Superintendent or Designee)

The party of the second part covenants with the party of the first part that in consideration of the payments hereinbefore stated and of the covenants and agreements set forth that said school children will be conveyed safely, that said duties and obligations in relation thereto pursuant to this contract will be faithfully performed, at all times exercising proper supervision over said children and that said party of the second part will abide by all reasonable rules and regulations and that the driver will be at least 21 years of age and duly licensed and that said driver will be currently approved by the chief school administrator. And the party of the second part further covenants and agrees that the vehicle shall come to a full stop before crossing the tracks of any railroad and before crossing any State highway and that it shall at all times comply with the rules and regulations of the Department of Transportation applying to such vehicles.

It is mutually agreed that this contract shall not become valid and binding upon either party thereto until the same shall be signed by the trustee or president of the board of education and the contractor. This contract or any right, title or interest therein may not be assigned by the party of the second part without the previous consent in writing of the party of the first part. This contract shall be void and of no effect unless the party of the second part shall comply with all applicable provisions of the Workman's Compensation Law in respect to employees engaged in the performance of this contract. The party of the second party will comply with the Labor Law.

"The contractor hereby consents to an audit of any and all financial records relating to this contract by the Department of Audit and Control." "The contractor further agrees to provide to the board of education, trustee(s), or the Commissioner of Education, upon request, any information relating to this contract including financial data."

State aid will be computed on account of this contract in accordance with the total sum specified. Any expenditure in excess of this total sum will not be considered in computing State aid. For school districts eligible for transportation aid, no aid shall be allowed for a period greater than 120 days prior to the filing of the contract in accordance with Section 3625 of the State Education Law.

MINIMUM STATUTORY INSURANCE REQUIREMENTS as provided in Section 370 of New York State Vehicle and Traffic Law must be complied with.

If COMPETITIVELY BID	date of bid opening	Complete BID	TABULATION below:
1(Name)	(Amount of Bid)	3	(Amount of Bid)
2	, ,	4.	
(Name)	(Amount of Bid)	(Name)	(Amount of Bid)
	pleted reasons on a separate sh		to the lowest bidder, state reasons act. If no bids are received, it is
	on which you can secure from the papers. If detailed specifical		h one printed copy of each Notice vard a copy.
a footnote to that line item sh		, second, etc.) of a	dget and Budget Brochures. Also - year (two, three, etc.) contract,
REQUEST FOR PROPOS	ALS: If contact was awarded t	hrough a request for propos	als (RFP), submit evidence of the

EXTENSIONS AND ADDENDUMS: An Extension of Contract (Form CE) must be filed for all extensions. Please notify the Department by letter of any additions to a contract after it has been filed with the Department. Such additions can only be made where authorized by the contract specifications.

date of the request, the forms and instructions used in making the request, the contract specifications, all proposals received, the criteria used in evaluating the proposals, the weights assigned to each criterion, and the scores used to assess each category of the criteria, in accordance with the provisions of Section 156.12 of Commissioner of Education

Regulations.

Rates for Rocky Point UFSD Emergency Contract 2021

BIG BUS	Per
4 Hour	482.00
After Base rate 30 min increment	65.00

Van	per
4 Hour	435.00
After Base rate 30 min increment	55.00

Tolls / Parking not included. All trips are in Suffolk and Nassau County Scheduling is upon availability



Rocky Point Union Free School District

Annual Risk Assessment Update Pertaining to the Internal Controls of District Operations

December 2020

INDEPENDENT ACCOUNTANTS' REPORT ON APPLYING AGREED UPON PROCEDURES

The Board of Education Rocky Point Union Free School District

We have performed the procedures enumerated below, which were agreed to by the Rocky Point Union Free School District (the "District"), solely to assist the District. This agreed upon procedures engagement was performed in accordance with auditing standards established by the American Institute of Certified Public Accountants and the applicable standards contained in Government Auditing Standards, issued by the Comptroller General of the United States. The sufficiency of these procedures is solely the responsibility of the specified users of the report. Consequently, we make no representation regarding the sufficiency of the procedures described below either for the purpose for which this report has been requested or for any other purpose.

We have updated our December 2019 Risk Assessment by performing certain internal audit procedures pertaining to the time period starting January 1, 2020 through December 31, 2020. The updated Risk Assessment and related internal audit plan concentrates on the following key internal control areas:

- Governance and Planning
- Budget Development
- Accounting and Reporting
- Revenue and Cash Management
- Grants
- Payroll
- Human Resources
- Benefits
- Purchasing and Related Expenditures
- Facilities/Capital Projects

- Fixed Assets
- Food Service
- Extraclassroom Activity Fund
- Information Systems
- Student Data Management
- Pupil Personnel Services
- Transportation
- Security and Safety
- Cyber Security

We are available to discuss this report with the Board of Education or others within the District at your convenience.

Our engagement is limited in scope and will be confined to our agreed-upon procedures. We will not be conducting an audit or review of the district's financial statements and therefore we will not express an opinion or any other form of assurance on them.

At the end of our engagement, we will present the results of applying the agreed-upon procedures in the form of our findings in a report. Our report should be used only for the intent of the original users of this report, and will include a statement indicating that had we performed additional procedures, other matters might have come to our attention that would have been reported to you. As such, using this report for anything other than the original intent of the agreed-upon procedures could mislead the readers. You must notify us immediately if the original users of the report change.

Very truly yours,

Nawrocki Smith LLP January 29, 2021



Rocky Point Union Free School District

Annual Risk Assessment Update Pertaining to the Internal Controls of District Operations

December 2020

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Risk Assessment Overview

This Risk Assessment report provides a presentation of our view of the school district's risk pertaining to its financial operations. It gives the District's administration the information necessary to help optimize its overall performance. The report identifies, expresses, and prioritizes the key program risks so that the District's administration can focus on those areas most critical to its success. This analysis is used to define the District's risk profile. It will provide an overview of the risks facing the District's operations.

In accordance with the laws of New York, 2005, Chapter 263, all school districts and BOCES were required to establish an internal audit function no later than July 1, 2006 and be in operation no later than December 31, 2006. This function should include, at a minimum, development of a risk assessment of district operations, including but not limited to:

- a review of financial policies, procedures and practices
- an annual review and update of such risk assessment
- annual testing and evaluation of one or more areas of the District's internal controls
- preparation of reports which analyze significant risk assessment findings
- recommended changes for strengthening controls and reducing identified risk; and specifying time frames for implementation of such recommendations

Pursuant to Section 170.12 – Regulations of the Commissioner of Education – School District Financial Accountability, each school district must prepare a corrective action plan, approved by the Board of Education in response to findings to final reports issued by the internal auditor. This plan should include expected dates of implementation and should be filed with the New York State Education Department.

Internal Audit Objectives

The objectives of our engagement are as follows:

- develop an understanding of the critical business processes of the District within each functional area
- identify and qualify risks based on the understanding of the business processes and stated business rules
- identify stated controls that are currently in place to address those risks and ascertain if they are operating effectively
- recommend improvements in internal controls

Scope and Methodology

The Board of Education has engaged Nawrocki Smith as the District's internal auditor. In compliance with New York State Laws, we have performed an annual update to the District risk assessment with respect to policies, procedures, and internal controls pertaining to District operations. The procedures applicable to the annual update of the District's risk assessment were performed during the fiscal year ending December 2019 and were carried out in order to determine an internal audit plan for 2020 and thereafter. This risk assessment will be updated annually to reflect any changes in the current control environment and the existing internal audit plan.

Our risk assessment consisted of the following methodology:

- Perform interviews of Administration and other appropriate personnel
- Document procedures within key functional areas
- Identify key controls and perform audit tests of those controls
- Assess effectiveness of the key controls
- Identification and review of organization structure
- Analysis of risks that are a threat to the achievement of objectives
- Create a risk profile and internal audit plan

In addition to the above procedures, we have also evaluated and considered the following within our overall risk assessment:

- District policies and procedures
- Recent focus of State Comptroller Audits
- Board of Education/Audit Committee meetings
- Materiality to Financial Statements
- Changes in management or key personnel
- Financial reports provided to the Board
- External auditor management letters
- District corrective action plans
- Organizational chart and job descriptions

Internal Audit Risk Assessment Update Summary

We have analyzed nineteen (19) Business Process areas within the District and have developed an internal audit plan based upon our assessment of each area. Each of the nineteen (19) Business Processes contains multiple categories for which an extensive cycle analysis will be performed during the proposed time period noted within the risk rating and internal audit plan. The plan as presented will be revised each year based upon the annual risk assessment update and events/requests that occur during the year which impact the priority of future internal audit services.

The results of our update risk assessment are summarized below and in the tables presented on pages 5 through 6. We have utilized a "Low," "Moderate," and "High" control risk rating assessment scale of the District.

Current Year Rating

Rating	<u>Cou</u>	ınt
High	2	2.41%
Moderate	3	3.62%
Low	77	92.77%
N/A	1	1.20%
Total	83	100.0%

Changes from Prior Year

Category (*)	<u>Соці</u>	<u>1t</u>
"High" to "Low"	-	0.00%
"High" to "Moderate"	-	0.00%
"Moderate" to "Low"	-	0.00%
"Low" to "Moderate"	-	0.00%
"Moderate" to "High"	2	100.00%
Total		100.0%

^(*) Refer to pages 5 through 6 for business process rating changes.

• The December 2020 risk assessment update contains six (6) current year recommendations.

We have summarized below our work plan for 2021:

Cycle Review:

Cyber Security

Risk Rating and Internal Audit Plan

√= Internal Audit Services Provided X = Proposed Business Cycle Review ★= Business Cycle Review Complete T = Limited Testing of Business Process

				RISK	-		YEAR	OF SERV	/ICE
	Business Process	Business Process Categories	Inherent		itrol	Prior Years	20-21	21-22	Subsequent Years
	-			18-19	19-20				
	Governance	Governance and Control Environment	Н _	L	L	V			X
1	and Planning	Required Policies and Procedures	H	L	L	√			X
			-						
9	Budget	Budget Development	H	L	L_	L			X
2	Development	Budget Monitoring and Reporting	H	L	L				X
									_
	Accounting	Financial Accounting and Reporting	H	L	<u>L</u>	1			<u>X</u>
3	<u>and</u>	External/Internal/Claims Auditing	H	L	L	√			X
	Reporting	Fund Balance Management	H	L	<u>L</u>	√			<u> </u>
			· · · · · · · · · · · · · · · · · · ·						· ·
		Real Property Tax	M	<u>. L</u> :	L_	*			X
		State Aid	H	L	L	*			X
,		Out of District Tuition/Reimbursable Expenses	M	. L .	<u> </u>	*	ļ		X
		Use of Facilities	L	L	L	*	ļ	ļ	X
	Revenue and	Donations	M	L	L	*			X
4	<u>Cash</u>	Vending Machines	Н	L	L	*	<u> </u>	ļ	X
	Management	Cash Receipts	. Н	L	L	*			X
		Cash/Investment Management	H	L	L	*		<u> </u>	X
1		Petty Cash	L.	. <u>L</u>	L	*	ļ	ļ	X
		Bank Reconciliations	H	L	L	*	ļ		_X
-		Online Banking	H	L.	L	*	r		X
 			1 1	-			<u>, , , , , , , , , , , , , , , , , , , </u>		
		General Processing	H	<u> </u>	L	*	ļ	<u> </u>	X
_		Grant Application	M	L	Ļ			<u> </u>	<u>X</u>
<u> 5</u>	<u>Grants</u>	Expenditures and Allowable Costs	<u>H</u>	<u> </u>	L.	*	<u> </u>		X
]		Cash Management	M	L	L T.	*			X
\vdash		Reporting and Monitoring	H	L	LL		<u> </u>	<u> </u>	X
	-	Payroll Disbursements	_ H	. L	. L	*	1	ſ	X
		Overtime Payments	H	L	L	*	 		X
6	Payroll	Payroll Accounting and Reporting	, <u>H</u>	L	_ L	*	 	<u> </u>	X
1 =	<u>ravion</u>	Payroll Tax Filings	H	L .	. L	*			X
		Payroll Reconciliation	H	L	L	*			X
		1 ayron reconstructor	'				1		
		Employment Requisition/Hiring	н	L	- L	*			X
1 _ 1	Human	Personnel Evaluation	H	L	. L .	*		Ì	X
7	Resources	Employee Attendance	. н	. L	L	*			X
1		Termination	H	L.	L.	*			X
		Eligibility	Н	L	L	*			X
	Dom - C4-	Benefit Calculations	H	L	Ļ	*			_X
8	<u>Benefits</u>	Patient Protection and Affordable Care Act	H.	L	L				X
		Retiree Benefits	Н	. L	L	*			X
		Purchase Order System/Vendor Database	H	L	L	*	<u> </u>	<u> </u>	X
	<u>Purchasing</u>	Purchasing Process	- H	Ĺ	L	*			X
9	and Related	Payment Processing	H .	L	L	*			X
	<u>Expenditures</u>	Employee Reimbursements	H.	L	L	*		<u> </u>	X
		Credit Cards	H	Ŀ.	L	*	<u> </u>	L	X
			-,		-				•

				ŀ	RISK			YEAR	OF SERV	
	Business	Business Process Categories	Inherent		Cor	ıtrol	Prior	20-21	21-22	Subsequent
	Process	Business Process Categories	muerent				Years		21-22	Years
		7 373 M. A. A. A. A. A. A. A. A. A. A. A. A. A.	VY		18-19	19-20_	*			X
	Facilities/	Facilities Maintenance and Work Orders	H		L.	.L	*			X
10	Capital	Capital Project Planning and Monitoring	M		<u>L</u>	L	*		_	
_	Projects	Capital Project Funding and Payments	M		L	<u> </u>	* *		!	<u> </u>
		Recordkeeping and Reporting	Н		L	L				X
	-	Inventory/ Capitalization Policy	Н		L	L	I			X
11	Fixed Assets	Acquisition and Disposal	Н		L	L	V			X
		Inventory Process and Recordkeeping	H		L	L				X
							★	Γ-	T	
]		Sales Cycle and System	M		L	_ <u>L</u>	<u> </u>			X
		Inventory and Purchasing	M		<u>M</u> .	M	*			X
12	Food Service	Free and Reduced Meals	M		L	Ļ	*			X
.		Federal and State Reimbursement	H		L_	L	*			X
		Financial Reporting and Monitoring	M	-,-	L	. L	*	<u> </u>	<u> </u>	X
		General Controls	Н		. L	.L	*		ı	X
	Extraclassroom	Revenue	Н		L	L	*	_		X
<u>13</u>	Activity Fund	Expenditures	M		L	L	*		İ	X
		Reporting	M		L	L	*			X
ŀ		Governance	Н.		L.	L	*			X
		Network Security	Н		. L	L			-	X
14	<u>Information</u>	Application Security	H		L	L	*		 	X
·	System	Physical Security	H		L	L	*			X
		Inventory	H		L	L	*		 	X
\dashv	· !	Disaster Recovery	, Ħ		L	<u>L</u>	*			X
	G. 1 . 1 . 1	Registration and Enrollment	Н		L,	L	*		Τ	X
<u>15</u>	Student Data	Student Attendance	H		L	L	*			X
	Management	Student Performance	H		Ĺ	Ĺ	*			X
		In the state of th								
	D 11D 1	Budgeting and Planning	H		L	L	*			l Y
<u>16</u>	Pupil Personnel	STAC Reimbursement	H		M	H.				
	<u>Services</u>	Medicaid Reimbursement	H		M	H	*		 	
		RFP and Contracts	H	m=1	L	L	, x			
		Fleet Inventory and Maintenance	Н	Ė	N/A	N/A	#			X
1		Bus Routing and Planning	Я		L	L	*			X
<u>17</u>	Transportation	Labor and Supervision	H		L	L	*			X
ŀ		Contract Management	Н		L,	L	*			Х
	,	State Aid	Н		L	L	*			X
		Plan Development and Strategy	17		, ,	T 7	1	r	T v	Ι
ļ	Sofoto and		H		L	L	-		X	
<u>18</u>	Safety and Security	Building Access and Security System	H		Li T	L	 		X	
	<u>эссигну</u>	Compliance and Incident Reporting Safety and Security Monitoring	-H Н		. L L	L	 		X	
		General Controls	H		L	L		X		
<u>19</u>	Cyber Security	Information & Asset Security	H		M	M		X	ļ	ļ
		Vulnerability Assessment	H		M	M		X		ļ
\vdash	· -	Incident Response & Recovery	H	espe [®]	L L	L	<u> </u>	X	<u> </u>	<u> </u>
		· · · · · · · · · · · · · · · · · · ·								

<u>Inherent Risk</u> - Inherent risk is the risk of a material misstatement in the un-audited information assuming the absence of internal controls procedures.

<u>Control Risk</u> - Control risk is the risk that a material misstatement in the un-audited information will not be detected and corrected by the management's internal control procedures on a timely basis.

Risk Assessment Observations and Recommendations

Current Year Observations and Recommendations

Pupil Personnel Services

- 1. We noted that the District does not reconcile the number of sessions claimed to the number of sessions paid or review denied claims.
 - We recommend that the District develop a procedure to reconcile sessions claimed to sessions paid and review denied claims to ensure the District receives all funds it is entitled to.
- 2. We noted that parental consent was not on file for six (6) students receiving Medicaid eligible services. Without parental consent, eligible services cannot be claimed. The District had claimed services for three (3) of the six (6) students noted in our sample.
 - We recommend that the District request signed parental consent forms for all students who are eligible to be claimed and maintain these forms in the student's folder. The District should consider using the checklist recommended above to track receipt of required documentation.
- 3. We noted seven (7) students with a properly completed parental consent form were not claimed because prescriptions and/or session notes were not maintained.
 - We recommend that the District maintain prescriptions and session notes for all services provided to Medicaid eligible students to ensure claims can be submitted on a timely basis.
- 4. We noted that 2018/2019 STAC calculation worksheet was prepared using estimates based on services required by the student's IEP. The District could not provide complete documentation to support the calculations for services provided by outside vendors.
 - We recommend that Special Education Department maintain a file for each STAC eligible student with a copy of the student's IEP and all related service provider invoices applicable to that student for each school year. The folder should be sent to the Business Office to ensure the STAC calculation worksheet accurately reflects costs incurred for each student.
- 5. We noted that District employee salaries used in seven (7) of the STAC calculations did not agree to the salary information in nVision. In addition, we noted the teachers used in the STAC calculation did not agree to the class schedule for two (2) students.
 - We recommend that the District review the salaries used in each calculation to ensure they agree to the student's class schedule and salary information in nVision.
- 6. We noted that three (3) invoices included charges for services that did not agree to the vendor's contracted rates.

We recommend that the District compare the charges on all provider invoices to contracted
rates and session detail to the number of sessions charged to ensure all invoices submitted for
payment are accurate.

Rocky Point Union Free School District Internal Audit - Nawrocki Smith History of Internal Audit Reports Issued July 2006 through June 2020

Report Type	<u>06/07</u>	07/08	08/09	<u>09/10</u>	<u>10/11</u>	11/12	12/13	<u>13/14</u>	14/15	<u>15/16</u>	<u>16/17</u>	<u>17/18</u>	<u>18/19</u>	19/20
Cycles:														
Benefits	-	-	-	х	-	-	-	-	-	-	-	х	-	-
Extraclassroom Activity Funds	X	-	-	-	-	-	-	-	-	-	-	-	-	-
Facilities and Capital Projects	-	•	-	-	-	-	X	-	-	-	-	-	-	-
Food Service	•	-	-	-	-	-	-	X	-	-	-	-	-	-
Grants	-	-	-	-	•	-	-	-	-	-	-	•	χ.	•
Human Resources	-	-	-	-	-	-	-	-	Х	-	-	-	-	•
Information Systems	-	-	-	-	-	x	-	-	-	-	-	-	-	-
Payroil	Х	-	-	-	-	-	-	-	-	X	-	-	-	-
Pupil Personnel Service	-	-	-	-	X	-	-	-	-	-	-	-	-	X
Purchasing	-	X	-	-	-	-	-	-	-	-	-	-	-	-
Revenue & Cash Management	-	-	Х	-	-	-	-	-	-	-	-	-	-	-
Student Data Management	-	-	-	-	-	-	•	-	-	-	х	-	-	-
Key Control Testing:														
Bank Reconciliations	-	x	-	х	x	x	-		-	_	-		_	-
Budget Transfers	-	X	х	х	Х	X	-	-	-	-	-	-	-	-
Cash Disbursements	-	-	х	-	X	X	-	-	-	_	-	-	-	-
Cash Receipts	-	х	-	-	Х	X	-		_	-	-	-	-	-
HR Hiring, Termination, and Changes	-	-	-	-	X	-	-	-	-	-	-	-	-	-
ECAF Cash Receipts	-	-	-	X	-	-	-	-	-	-	-	-	-	-
Employee Attendance	-	-	-	X	-	-	-	-	-	-	-	-	-	-
Information Technology	-	-	-	-	X	-	-	-	-	-	-	-	-	-
Fixed Assets	-	-	-	х	-	-	-	-	-	-	-	-	-	-
Journal Entries	-	X	Х	х	X	Х	-	-	-	-	-	-	-	-
Payroll Disbursements	-	•	-	-	X	-	-	-	-	-	-	-	-	-
Payroll Tax Reconciliations	-	-	Х	-	-	-	-	-	-	-	-	-	-	-
Other Internal Audit Services:														
Corrective Action	х	-	-		_	-	-	_	-	-		_	_	-
Forensic Investigation	_		-	-	-	х	_	_	-	-	_		_	_
Fund Balance	_	-	-	х	-	•	_	-	_	_	_	_	_	_
Vendor Database Analysis	-	-	х	-	-	-	_	-	_	_	_			_
Procedures Pertaining to District Administrators	-	-	х	_	-		-	-	-	_			_	_
Risk Assessment	x	х	X	х	x	х	x	x	х	X	X	х	x	х
Transportation Vendors - Financial Analysis	-	•	-	-	•	x	-	-	-	-	-	-	-	-



ROCKY POINT UNION FREE SCHOOL DISTRICT OFFICE OF THE SUPERINTENDENT

90 Rocky Point - Yaphank Road Rocky Point, New York 11778

Telephone: (631) 744-1600

Fax: (631) 849-7558

Dr. Scott O'Brien

Superintendent of Schools

Christopher A. Van Cott

Assistant Superintendent for Business

April 20, 2021

New York State Education Department Office of Audit Services 89 Washington Avenue Room 524 EB Albany, NY 12234

To Whom It May Concern:

The Rocky Point Union Free School District hereby submits a **Corrective Action Plan for the annual Risk Assessment Report** ("Report") as required under Section 170.12 of the Regulations of the Commissioner of Education in response to matters identified in the 2020/21 Report provided to the District by Nawrocki Smith, LLC., internal auditors.

Upon review of nineteen (19) Business Processes of the District, the auditors revised their risk opinion for two categories within Pupil Personnel Services from "Moderate" to "High" risk. Please note the corrective actions below are intended to ensure the District properly accounts for the findings contained in the report entitled Rocky Point Union Free School District, Annual Risk Assessment Pertaining to the Internal Controls of District Operations, December 2020.

Current Year Observations and Recommendations

Pupil Personnel Services

Auditor Recommendation #1:

We noted that the District does not reconcile the number of sessions claimed to the number of sessions paid or review denied claims. We recommend that the District develop a procedure to reconcile sessions claimed to sessions paid and review denied claims to ensure the District receives all funds it is entitled to.

District Corrective Action(s):

A master list of Medicaid students with eligible services will be maintained by the District's third party Medicaid claims Consultant. This document will contain notes as to services/sessions claimed or unclaimed and include related explanations. This will be a shared document between the District's Special Education Office, Business Office and third-party Consultant. Effective for the 2021-22 fiscal year.

Auditor Recommendation #2:

We noted that parental consent was not on file for six (6) students receiving Medicaid eligible services. Without parental consent, eligible services cannot be claimed. The District had claimed services for three (3) of the six (6) students noted in our sample. We recommend that the District request signed parental consent

forms for all students who are eligible to be claimed and maintain these forms in the student's folder. The District should consider using the checklist recommended above to track receipt of required documentation.

District Corrective Action(s):

Three of the six students referenced are enrolled in the Supplemental Security Income (SSI) program. Parental consent forms are maintained by the state for these students and not filed at the District. District will now require Consultant to provide parental consent forms even if family is already registered in the S.S.I. program. Effective immediately.

Auditor Recommendation #3:

We noted seven (7) students with a properly completed parental consent form were not claimed because prescriptions and/or session notes were not maintained. We recommend that the District maintain prescriptions and session notes for all services provided to Medicaid eligible students to ensure claims can be submitted on a timely basis.

District Corrective Action(s):

In order to claim for Medicaid reimbursement, a number of records are to be provided and maintained. Even though a student is Medicaid-eligible it does not always result in being able to submit a claim if the District is missing documentation. Examples include: missing sessions notes, prescriptions issued by non-Medicaid providers, prescriptions received from out-of-state doctors, etc. District will schedule formal monthly phone calls with Medicaid consultant to review a shared document containing claims, missing items, etc. to better track claims submitted, compared to claims not paid. Missing and/or incorrect documentation will be updated by Consultant and the District will work internally and/or with families to collect necessary documentation in order to receive maximum Medicaid reimbursement. Effective for the 2021-22 fiscal year.

Auditor Recommendation #'s 4 & 5:

We noted that 2018/2019 STAC calculation worksheet was prepared using estimates based on services required by the student's IEP. The District could not provide complete documentation to support the calculations for services provided by outside vendors. We recommend that Special Education Department maintain a file for each STAC eligible student with a copy of the student's IEP and all related service provider invoices applicable to that student for each school year. The folder should be sent to the Business Office to ensure the STAC calculation worksheet accurately reflects costs incurred for each student. We noted that District employee salaries used in seven (7) of the STAC calculations did not agree to the salary information in nVision. In addition, we noted the teachers used in the STAC calculation did not agree to the class schedule for two (2) students. We recommend that the District review the salaries used in each calculation to ensure they agree to the student's class schedule and salary information in nVision.

District Corrective Action(s):

The District has contracted with a STAC Consultant to perform training and claim submissions. Said Consultant is an expert in this area and provides these services to multiple districts. As such, the source and format of the District's existing internal worksheets used to calculate in-house Medicaid service costs will be aligned with best practices as experienced by Consultant. Effective for the 2021-22 fiscal year.

Auditor Recommendation #6:

We noted that three (3) invoices included charges for services that did not agree to the vendor's contracted rates. We recommend that the District compare the charges on all provider invoices to contracted rates and session detail to the number of sessions charged to ensure all invoices submitted for payment are accurate.

District Corrective Action(s):

Every five years, the District administers a Request for Proposal (RFP) process to secure needed special education services from a variety of providers. Submissions are reviewed and awarded based

on a number of factors. Following contract award, a reference binder is prepared containing a master list of rates. This binder will now be provided to designated clerical staff members within the special education office to utilize when reviewing invoices <u>prior</u> to their supervisor's signature of approval. It will also be ensured the District's Claims Auditors who reviews outgoing payments has the most up-to-date reference manual. Effective for the 2021-22 fiscal year.

Thank you very much for the opportunity to identify procedural changes & enhancements to continue to improve the District's strong internal controls and fiscal health.

Very truly yours,

Christopher A. Van Cott

Assistant Superintendent for Business

Cc: Dr. Scott O'Brien, Superintendent of Schools

Virginia Holloway, Treasurer

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	Medicaid Reimbursement Testing

I. Scope of Engagement

The Board of Education of the Rocky Point Union Free School District (the "District") has engaged Nawrocki Smith LLP to provide internal audit services with respect to the District's policies, procedures, and internal controls pertaining to the Pupil Personnel Services ("PPS") Cycle. As part of this engagement, we performed extensive analysis and validation tests of the District's PPS area.

The objective of our audit was to determine if the internal controls over the financial aspects of PPS processing are adequate to ensure that the District is properly claiming for reimbursement for which they are entitled to and to determine if internal controls surrounding procurement of special education professional services are operating effectively. In order to verify that the PPS function has proper internal controls, we interviewed key personnel and tested various transactions.

Our analysis of this functional area consisted of the following:

- Documented functional area procedures applicable to the PPS Cycle after interviews and conversations with key employees
- Identified key controls within each functional area of the PPS Cycle and performed audit tests of those controls
- Made observations and recommendations pertaining to the internal controls of the PPS Cycle based on interviews and testing that was performed

Interviews and inquiries were conducted with the following District employees:

<u>Title</u>	Department
Executive Director of Pupil Personnel Services	Pupil Personnel Services
Director of Special Education	Special Education
Treasurer	Business Office
Accountant	Business Office

The PPS Office of the Rocky Point Union Free School District encompasses several functional areas including, but not limited to, coordination of special education services for students, maintenance of documentation for Medicaid eligible students, etc. The Business Office of the Rocky Point Union Free School District encompasses several functional areas including, but not limited to tracking and submitting for reimbursement for the System to Track and Account for Children ("STAC") eligible students, coordinating service agreements and contracts, related service invoice review and payment, etc.

For the purpose of this audit, we focused our analysis and testing in the areas of Medicaid reimbursement, STAC reimbursement, and cash disbursements within the Pupil Personnel Services ("PPS") Office.

II. Medicaid Reimbursement Testing

The New York State Department of Education and the New York State Department of Health developed the School Supportive Health Services Program and the Preschool Supportive Health Services Program to assist school districts in obtaining Medicaid reimbursement for related services provided to students with Individual Education Programs ("IEPs"). Services that qualify for reimbursement include physical and occupational therapy, speech pathology, psychological counseling, skilled nursing services and transportation. School districts receive Federal reimbursement of approximately fifty percent (50%) of the claimed amounts.

We selected a sample of fifteen (15) Medicaid eligible students from the 2018/2019 school year to determine if the District is properly claiming for reimbursement. We reviewed the student's IEP and service provider invoices and session notes to determine if the proper amount of sessions were claimed and paid. We also reviewed each student's file to determine if a valid prescription and parental consent form was on file.

Observation and Recommendation #1

We noted that the District does not reconcile the number of sessions claimed to the number of sessions paid or review denied claims.

➤ We recommend that the District develop a procedure to reconcile sessions claimed to sessions paid and review denied claims to ensure the District receives all funds it is entitled to.

Observation and Recommendation #2

We noted that parental consent was not on file for six (6) students receiving Medicaid eligible services. Without parental consent, eligible services cannot be claimed. The District had claimed services for three (3) of the six (6) students noted in our sample.

We recommend that the District request signed parental consent forms for all students who are eligible to be claimed and maintain these forms in the student's folder. The District should consider using the checklist recommended above to track receipt of required documentation.

Observation and Recommendation #3

We noted seven (7) students with a properly completed parental consent form were not claimed because prescriptions and/or session notes were not maintained.

We recommend that the District maintain prescriptions and session notes for all services provided to Medicaid eligible students to ensure claims can be submitted on a timely basis.

III. STAC Reimbursement Testing

The System to Track and Account for Children (STAC) is a unit within the New York State Education Department responsible for processing requests for Commissioner's approval for reimbursement. Reimbursement is available for the costs of providing services to preschool and school-age students placed in special education programs at public and SED-approved private schools, special-act school districts, BOCES, and at state-supported and state-operated schools for the deaf and blind. Costs that are available for reimbursement include tuition, share of teacher salaries plus fringe benefits, share of classroom aide salaries plus fringe benefits, share of related services specified on the IEP, and costs of IEP required devices and services.

We selected a sample of fifteen (15) STAC eligible students from the 2018/2019 school year to determine if the District is properly claiming for reimbursement. For each student selected, we requested the IEP for related services the student should have received during the school year and documentation to verify the accuracy and completeness of student information and costs claims.

Observation and Recommendation #4

We noted that 2018/2019 STAC calculation worksheet was prepared using estimates based on services required by the student's IEP. The District could not provide complete documentation to support the calculations for services provided by outside vendors.

➤ We recommend that Special Education Department maintain a file for each STAC eligible student with a copy of the student's IEP and all related service provider invoices applicable to that student for each school year. The folder should be sent to the Business Office to ensure the STAC calculation worksheet accurately reflects costs incurred for each student.

Observation and Recommendation #5

We noted that District employee salaries used in seven (7) of the STAC calculations did not agree to the salary information in nVision. In addition, we noted the teachers used in the STAC calculation did not agree to the class schedule for two (2) students.

We recommend that the District review the salaries used in each calculation to ensure they agree to the student's class schedule and salary information in nVision.

IV. Homeless STAC Reimbursement Testing

School Districts within New York State can submit a STAC claim for each year a student is homeless. The District sends a STAC-202 eligibility form to NYSED for each student and verifies services each year to obtain reimbursement of 100% of the prorated approved tuition costs.

Observation

We noted that there were no STAC claims for homeless students during the time period under audit as all homeless students in the District were Rocky Point residents at the time they became homeless and therefore, could not be claimed.

> No recommendation at this time.

V. PPS Cash Disbursement Testing

General Municipal Law states that goods and services that do not require bids must be procured in a prudent and economical manner. The law requires the Board of Education to adopt written policies and procedures for these purchases. The District's purchasing policies state when quotes or requests for proposal may be used.

We selected a sample of twenty-five (25) PPS related cash disbursements from the 2019/2020 school year to verify that the District is properly following General Municipal Law and their purchasing policies. We tested for items such as accurate invoice rates as specified in the contract, proper approval and receiving signatures, correct remittance addresses, and any invoices outstanding for more than ninety (90) days.

Observation and Recommendation #6

We noted that three (3) invoices included charges for services that did not agree to the vendor's contracted rates.

> We recommend that the District compare the charges on all provider invoices to contracted rates and session detail to the number of sessions charged to ensure all invoices submitted for payment are accurate.

VI. Review of IEP Direct Permissions

The District uses IEP Direct to record information related to special education students. The accuracy of the information maintained in IEP Direct is crucial to the STAC and Medicaid filing process as well as instruction provided to students. In addition, appropriate permissions are essential to protect student privacy.

We reviewed the IEP Direct user listing report as of January 21, 2021 to determine if only active employees are included in the listing. The IEP Direct report included two hundred seventy-seven (277) active users. Of these users, one hundred forty-two (142) are District employees.

Observation

We noted that all IEP Direct users were active District employees.

> No recommendation at this time.

VII. Risk Rating and Audit Opinion

Inherent Risk: Moderate Control Risk: Moderate

Audit Opinion: Needs Improvement

RISK RATING DEFINITIONS

<u>Inherent Risk</u> – Inherent risk is the risk of a material misstatement in the un-audited information assuming the absence of internal control procedures. Inherent risk includes any risk arising from fraud. As with other risks, inherent risk may be evaluated at various levels of aggregation (e.g. financial statement level, account balance assertion level) and at various stages during the course of the audit (e.g. client acceptance/retention state, audit planning stage, etc.).

Inherent Risk is particular to the area being reviewed if there were no controls in place. Thus, if there were no control procedures in place pertaining to the particular area, what is the risk of a material misstatement.

<u>Control Risk</u> – Control risk is the risk that a material misstatement in the un-audited information will not be detected and corrected by management's internal control procedures on a timely basis. Auditors evaluate control risk at the account balance assertion level based on a detailed knowledge of the client's business. Auditors may evaluate this risk in the second, third, and forth audit stages, namely the audit planning, control testing, and substantive testing stages.

<u>Control Risk</u> is particular to the District's controls currently in place in the area being reviewed. Thus, what is the risk of a material misstatement with the control procedures currently in place.

<u>Audit Opinion</u> – Based upon the audit work performed and our assessment of the controls within each particular audit area an audit opinion is provided for each audit area from one of the following three (3) categories:

Satisfactory: Controls are operating effectively

Needs Improvement: Controls need improvement for effectiveness

Unsatisfactory: Controls are unacceptable and need immediate improvement

Rocky Point Union Free School District Narrative of the Pupil Personnel Services Cycle January 2021

The following is a narrative, or a sequence of events, which describes the step by step process within the Pupil Personnel Services Cycle of Rocky Point Union Free School District (the "District"). The narrative was derived from discussions and interviews with special education employees as well as observations of the process. The Pupil Personnel Services Cycle has been broken down by area for ease of reference, including the following areas:

- I. Individualized Education Program ("IEP")
- II. Medicaid Reimbursement
- III. System to Track and Account for Children ("STAC") Reimbursement
- IV. Contracts/Requests for Proposal and Cash Disbursements

Blue = Internal Control

I. Individualized Education Program ("IEP")

- The Committee on Special Education ("CSE") evaluates students based on referrals from the student's parent, teacher or school psychologist.
- A CSE meeting is held within forty (40) days from the receipt of parental consent for their child to be evaluated. The District must hold the CSE meeting within sixty (60) days.
- The student may be given psychological, educational, social history, or physical evaluations and classroom observations.
- Psychological and speech evaluations are conducted by District employees.
- If the student requires an evaluation for physical therapy or occupational therapy, the District will use an outside vendor.
- The CSE reviews the results with the student's parents and determines eligible programs based on academic performance, teacher or parent reports, and results of evaluations.
- If the student is eligible to receive special education services, an IEP is developed to address the needs of the student. The IEP includes services to be provided, special equipment needed, goals, etc.
- IEPs are prepared and maintained in the software, IEP Direct.
- Changes to IEPs can be made at the annual review.
- Parents may also request a CSE meeting to propose a change to the IEP outside of the annual review. This is often the result of additional services requested.
- Parents can provide the CSE with written consent to meet and amend the IEP without their attendance.
- Once approved, the IEP is updated in IEP Direct.
- IEP Direct users include District employees and service providers/consultants.
- Accounts for IEP Direct is created by the Executive Director for Educational Services.
- Once the employee or service provider has an account for IEP Direct, the Principal Clerk in the Special Education Department can assign access permissions.
- Most users have view only permissions. Department administrators, clerical staff and sponsor teachers have access to edit IEPs.
- Clerical staff enter the approved programs and services on the IEP.
- Sponsor teachers write the levels of performance and goals.
- When staff resign or retire, the Executive Director for Educational Services will remove access to all District programs, including IEP Direct.
- The Special Education Department clerical staff will remove providers that are no longer used.

Rocky Point Union Free School District Narrative of the Pupil Personnel Services Cycle January 2021

II. Medicaid Reimbursement

- The New York State Department of Education ("NYSED") together with the New York State Department of Health ("DOH") developed the School Supportive Health Services Program ("SSHSP") and the Preschool Supportive Health Services Program ("PSHSP") to assist school districts in obtaining Medicaid reimbursement for related services provided to students with IEPs.
- Services that qualify for reimbursement include physical and occupational therapy, speech
 pathology, psychological counseling and skilled nursing services. Qualified services also
 include certain student evaluations (basic and comprehensive psychological evaluations,
 medical evaluations, etc.) and special transportation.
- In addition to the above services, school districts can claim Medicaid reimbursement for additional services called Targeted Case Management ("TCM").
- In order to be eligible for reimbursement, services must be provided by qualified professionals either under contract or employed by the District.
- The DOH provides a monthly fee schedule for each service with the exception of evaluations and special transportation. These fees are set separately and on a per diem basis.
- School Districts receive Federal reimbursement of approximately fifty percent (50%) of the claimed amounts. The State is entitled to half of the reimbursement sent to the District.
- New York State law requires that the District maintain specific supporting documentation for each student for six (6) years following the dates the services were provided or paid, whichever is later.
- The District contracts with a Consultant, Zycron Industries, Inc., to review required documentation and process Medicaid claims.
- The Senior Clerk Typist in the Pupil Personnel Services Department will contact parents to obtain parental consent forms when informed of a newly classified student.
- Once the Senior Clerk Typist receives the parental consent, a copy is sent to the Consultant.
- The District maintains a file for each student with their parental consent form, IEP, prescriptions and session notes.
- Most providers will enter their session notes directly into IEP Direct. Others will send hard copies to the District.
- Providers must be licensed and vendors must be designated as a "Medicaid Provider" in order for a Medicaid claim to be submitted for a student.
- The Consultant receives a copy of the information in the student folder to process claims.
- The Consultant will enter claims for students when all required information is received.
- Denied claims are reviewed by Consultant.
- The Business Office receives Medicaid reimbursement checks.

III. System to Track and Account for Children ("STAC")

- STAC is a unit within the NYSED responsible for processing requests for Commissioner's approval for reimbursement.
- Reimbursement is available for the costs of providing services to preschool and school-age students placed in special education programs at public and NYSED-approved private schools, special-act school districts, BOCES, and at state-supported and state-operated schools for the deaf and blind.

Rocky Point Union Free School District Narrative of the Pupil Personnel Services Cycle January 2021

- Costs that are available for reimbursement include tuition, share of teacher salary plus fringe benefits, share of classroom aide salary plus fringe benefits, share of related services specified on the IEP, and costs of IEP required devices and services.
- Costs that are not available for reimbursement include permanent fixtures, transportation, administration and regular education costs.
- The District has both in-district and out of district STAC eligible students.
- A list of eligible students is maintained by the Special Education Office.
- The threshold amount to qualify for STAC reimbursement changes each school year and varies between school districts. The threshold amount applies to in-district students.
- The out of district threshold amount varies by the school, placement, and program. Threshold amounts are set by New York State for all private and public schools so some may be above or below the District's in-district threshold amount.
- There is no STAC reimbursement threshold amount for summer services. Therefore, the District can submit a STAC claim for each student who receives special education STAC eligible services during the summer, regardless of the cost.
- The Special Education Department will send the Accountant in the Business Office copies of IEPs for students anticipated to meet the high cost threshold.
- The Accountant will compare what is received to the prior year or class rosters and request any IEPs that might be missing.
- Once the IEPs are received, the Accountant will enter the services, frequency, and duration into a cost calculation worksheet.
- The Accountant will obtain the student's schedule to determine what teachers or aides are assigned to the student.
- Salary information for teachers and aides is taken from nVision, the District's accounting software.
- If related services are expected to be provided by a vendor, the rate as per the vendor contract is multiplied by the frequency on the student's IEP for that type of service.
- The Accountant will update the estimated worksheet at the beginning of the subsequent school year when all invoices are received.
- The Special Education Department will send folders that include all invoices for each vendor.
- The Accountant will scan each invoice to determine if there are any charges for the STAC eligible students.
- Once all the costs are highlighted on the invoices, the Accountant will review each student to calculate the true cost for each student.
- STAC also reimburses school districts for students who have been determined to be homeless
 or runaway youth and for education services provided to incarcerated youth.
- Non-resident STAC approval is required for each year the student is homeless.
- The Office Application Specialist is made aware of any homeless students during the registration process.
- The Office Application Specialist will complete a STAC 202 Form and send to the appropriate parties.
- A listing of all homeless students in the District is maintained. The listing includes the date the student became homeless and is updated when the student enters permanent housing.
- The District has not submitted any STAC claims for homeless students as all homeless students on the listing were Rocky Point residents at the time they were considered homeless and are not eligible.
- An approved verification listing ("AVL") report is sent to the District once estimated costs have been received and approved by the NYSED.

Rocky Point Union Free School District Narrative of the Pupil Personnel Services Cycle January 2021

- Once actual, or final, costs are reviewed and approved by the NYSED, the District will be notified to verify all approved STAC claims.
- A school district will not be reimbursed for STAC claims, even if they are approved, unless they are verified by the District.
- Final verification is completed online by the Principal Clerk in the Special Education Department.
- The Business Office receives payment for STAC claims submitted and verified by the District.

IV. Contracts/Requests for Proposal and Cash Disbursements

- General Municipal Law states that goods and services that do not require bids must be procured in a prudent and economical manner. The law requires the Board of Education to adopt written policies and procedures for these purchases.
- The District's purchasing policies note that requests for proposal ("RFP") may be utilized for professional services and includes the procedures to locate prospective qualified firms, prepare the RFP and evaluate proposals.
- The Business Office is responsible for sending out RFPs or RFP extensions to all current providers on annual basis.
- Providers send back a signed and dated response to the RFP that includes a list of services and corresponding rates.
- The District must have a signed and dated response to the RFP before a vendor can be approved by the Board of Education.
- The Board of Education approves all contracts.
- All invoices received by the Special Education Department and reviewed and approved by Director of Special Education.
- All invoices received by the Pupil Personnel Services Department are reviewed and approved by the Executive Director for Pupil Personnel Services.
- The review includes a comparison of the rates charged on the invoice to the RFP and also compares services to each student's IEP to ensure that the services are accurate.
- Supporting documentation such as attendance sheets, calendars, or session notes are
 reviewed and attached to the invoice to ensure that the District is only paying for those
 services that the students actually received.
- The original invoice and supporting documentation is sent to the Business Office for payment.



ROCKY POINT UNION FREE SCHOOL DISTRICT OFFICE OF THE SUPERINTENDENT

90 Rocky Point - Yaphank Road Rocky Point, New York 11778

Telephone: (631) 744-1600 Fax: (631) 849-7558

Dr. Scott O'Brien

Superintendent of Schools

Christopher A. Van Cott

Assistant Superintendent for Business

April 20, 2021

New York State Education Department Office of Audit Services 89 Washington Avenue Room 524 EB Albany, NY 12234

To Whom It May Concern:

The Rocky Point Union Free School District hereby submits a **Corrective Action Plan for a cycle audit on Pupil Personnel Services** as conducted by Nawrocki Smith, LLC. As required under Section 170.12 of the Regulations of the Commissioner of Education, the corrective actions below are intended to ensure the District properly accounts for the findings contained in the report entitled *Rocky Point Union Free School District, Report on the Internal Controls of the Pupil Personnel Cycle, January 2021.*

Auditor Recommendation #1:

We noted that the District does not reconcile the number of sessions claimed to the number of sessions paid or review denied claims. We recommend that the District develop a procedure to reconcile sessions claimed to sessions paid and review denied claims to ensure the District receives all funds it is entitled to.

District Corrective Action(s):

A master list of Medicaid students with eligible services will be maintained by the District's third party Medicaid claims Consultant. This document will contain notes as to services/sessions claimed or unclaimed and include related explanations. This will be a shared document between the District's Special Education Office, Business Office and third-party Consultant. Effective for the 2021-22 fiscal year.

Auditor Recommendation #2:

We noted that parental consent was not on file for six (6) students receiving Medicaid eligible services. Without parental consent, eligible services cannot be claimed. The District had claimed services for three (3) of the six (6) students noted in our sample. We recommend that the District request signed parental consent forms for all students who are eligible to be claimed and maintain these forms in the student's folder. The District should consider using the checklist recommended above to track receipt of required documentation.

District Corrective Action(s):

Three of the six students referenced are enrolled in the Supplemental Security Income (SSI) program. Parental consent forms are maintained by the state for these students and not filed at the District. District will now require Consultant to provide parental consent forms even if family is already registered in the S.S.I. program. Effective immediately.

Auditor Recommendation #3:

We noted seven (7) students with a properly completed parental consent form were not claimed because prescriptions and/or session notes were not maintained. We recommend that the District maintain prescriptions and session notes for all services provided to Medicaid eligible students to ensure claims can be submitted on a timely basis.

District Corrective Action(s):

In order to claim for Medicaid reimbursement, a number of records are to be provided and maintained. Even though a student is Medicaid-eligible it does not always result in being able to submit a claim if the District is missing documentation. Examples include: missing sessions notes, prescriptions issued by non-Medicaid providers, prescriptions received from out-of-state doctors, etc. District will schedule formal monthly phone calls with Medicaid consultant to review a shared document containing claims, missing items, etc. to better track claims submitted, compared to claims not paid. Missing and/or incorrect documentation will be updated by Consultant and the District will work internally and/or with families to collect necessary documentation in order to receive maximum Medicaid reimbursement. Effective for the 2021-22 fiscal year.

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District Corrective Action(s):

The District has contracted with a STAC Consultant to perform training and claim submissions. Said Consultant is an expert in this area and provides these services to multiple districts. As such, the source and format of the District's existing internal worksheets used to calculate in-house Medicaid service costs will be aligned with best practices as experienced by Consultant. Effective for the 2021-22 fiscal year.

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We noted that three (3) invoices included charges for services that did not agree to the vendor's contracted rates. We recommend that the District compare the charges on all provider invoices to contracted rates and session detail to the number of sessions charged to ensure all invoices submitted for payment are accurate.

District Corrective Action(s):

Every five years, the District administers a Request for Proposal (RFP) process to secure needed special education services from a variety of providers. Submissions are reviewed and awarded based on a number of factors. Following contract award, a reference binder is prepared containing a master list of rates. This binder will now be provided to designated clerical staff members within the special education office to utilize when reviewing invoices <u>prior</u> to their supervisor's signature of approval. It will also be ensured the District's Claims Auditors who reviews outgoing payments has the most up-to-date reference manual. Effective for the 2021-22 fiscal year.

Thank you very much for the opportunity to identify procedural changes & enhancements to continue to improve the District's strong internal controls and fiscal health.

Very truly yours.

Christopher A. Van Cott

Assistant Superintendent for Business

Cc: Dr. Scott O'Brien, Superintendent of Schools

Virginia Holloway, Treasurer

AUTHORIZATION TO EXPEND CAPITAL RESERVE FUNDS ON CAPITAL PROJECTS

Property Tax Report Card 580209 - ROCKY POINT UFSD

Form Preparer Name:

2020-2021 - Page 1 Official - as of 04/16/2021 09:44 AM

****Please use Chrome or Firefox browsers when entering the Business Portal to complete the PTRC. Internet Explorer is NOT recommended.*****

Note: Some data elements of the Property Tax Report Card have been revised or renamed to more closely follow the Property Tax Cap calculations districts complete on the Office of the State Comptroller website. Please see the Help text above for definitions. Additional guidance on the Property Tax Levy Limit is available on the Office of Educational Management Services website: http://www.p12.nysed.gov/mgtserv/propertytax/taxcap/.

Please also submit an electronic version (PDF or Word) of your school district's 2021-22 Budget Notice to: emscmgts@nysed.gov. This will enable us to help correct any formula or data entry discrepancy quickly.

Notice: The Enacted Budget allows school districts to establish a reserve fund for NYS Teachers' Retirement System Contributions, effective immediately. This reserve, if applicable, should be reported in the Schedule of Reserves under 'Other Reserve' and with a description that says: "To fund employer retirement contributions to the New York State Teachers' Retirement System (TRS.)"

Form Due - April 26, 2021

CHRIS VAN COTT

Preparer's Telephone Number:	631-849-7564		
Shaded Fields Will Calculate	Budgeted 2020-21 (A)	Proposed Budget 2021-22 (B)	Percent Change (C)
Total Budgeted Amount, not including Separate Propositions A. Proposed Tax Levy to Support the Total Budgeted Amount ¹ B. Tax Levy to Support Library Debt, if Applicable C. Tax Levy for Non-Excludable Propositions, if Applicable ² D. Total Tax Cap Reserve Amount Used to Reduce Current Year Levy, if Applicable	84,586,600 52,483,059	85,692,726 52,483,059	1.31 %
E. Total Proposed School Year Tax Levy (A+B+C-D) F. Permissible Exclusions to the School Tax Levy Limit G. School Tax Levy Limit, Excluding Levy for Permissible Exclusions ³ H. Total Proposed Tax Levy for School Purposes, Excluding Permissible Exclusions and Levy for Library Debt, Plus Prior Year Tax Cap Reserve (E-B-F+D) I. Difference: (G-H);(negative value requires 60.0% voter	52,483,059 445,584 52,037,475 52,037,475	52,483,059 156,089 52,795,092 52,326,970	0.00 %
approval) ² Public School Enrollment Consumer Price Index	2,912	2,830	-2.82 % 1.23 %

¹ Include any prior year reserve for excess tax levy, including interest.

² Tax levy associated with educational or transportation services propositions are not eligible for exclusion under the School Tax Levy Limit and may affect voter approval requirements.

Intended Use of the

³ For 2021-22, includes any carryover from 2020-21 and excludes any tax levy for library debt or prior year reserve for excess tax levy, including interest.

	Actual 2020-21 (D)	Estimated 2021-22 (E)
djusted Restricted Fund Balance	13,076,258	12,706,808
ssigned Appropriated Fund Balance	3,277,377	2,733,249
djusted Unrestricted Fund Balance	4,062,282	3,427,709
ijusted Unrestricted Fund Balance as a proent of the Total Budget	4.80 %	4.00 %

Schedule of Reserve Funds

Reserve Type Reserve Name

Reserve Type Reserve Name

Reserve 3/31/21 Actual 6/30/21 Estimated 2021-22 School Year

Balance Ending Balance (Limit 200 Characters)**

Note: Be sure to click on the Save button at the bottom after each additional Reserve you add under Capital, Property Loss, Liability, or Other Reserve.

Capital	CAPITAL	For the cost of any	2,798,471	2,758,471	450000
		object or purpose for which bonds may be issued.			<u> </u>
Repair	N/A	For the cost of	0	0	0
		repairs to capital improvements or equipment.			
Vorkers	RESERVE FOR	For self-insured	1,430,044	1,135,044	200000
Compensation	WORKERS COMPENSATION	Workers Compensation and benefits.			
	RESERVE FOR	For reimbursement	515,531	468,031	50000
nsurance	UNEMPLOYMENT	to the State Unemployment Insurance Fund.			
Reserve for Tax	N/A	For the gradual use	0	0	0
Reduction		of the proceeds of the sale of school district real property.			
Mandatory	DEBT SERVICE	For proceeds from	139,925	116,925	23000
Reserve for Debt Service	RESERVE	the sale of district capital assets or improvement, restricted to debt service.			
nsurance	N/A	For liability, casualty,	0	0	0
		and other types of uninsured losses.			
Property Loss	PROPERTY	To cover property loss.	54,296	54,571	o
.iability	LIABILITY	To cover incurred	54,296	54,571	О
(add)		liability claims.	·		<u>-</u>

Tax Certiorari	N/A	For tax certiorari settlements.	0	0	<u></u> 0
Reserve for Insurance Recoveries	N/A	For unexpended proceeds of insurance recoveries at fiscal year end.	0	0	<u></u> 0
Employee Benefit Accrued Liability	EBALR I	For accrued 'employee benefits' due to employees upon termination of service.	4,160,665	4,163,165	_ 200000
Retirement Contribution	ERS RESERVE	For employer retirement contributions to the State and Local Employees' Retirement System.	2,804,270	2,811,770	400000
Reserve for Uncollected Taxes	N/A	For unpaid taxes due certain city school districts not reimbursed by their city/county until the following fiscal year.	0	0	<u></u> o
Single Other Reserve	TRS SUB- RESERVE	To fund employer retirement contributions to the New York State Teachers' Retirement System (TRS.)	1,258,685	1,261,185	<u></u> o

* NYSED Reserve Guidance:

http://www.p12.nysed.gov/mgtserv/accounting/docs/reserve_funds.pdf

OSC Reserve Guidance:

http://osc.state.ny.us/localgov/pubs/listacctg.htm#reservefunds

**Provide a brief, but specific, statement of the planned use and appropriation for the reserve in SY 2021-22. Mention any capital expenditures that will need to be voted upon in the upcoming Budget Vote.

_			
ſ	Save	Reset	Save & Ready

ROCKY POINT UFSD

Updated Tax Levy Cap2021-22 School Year

Prior Year Tax Levy Tax Base Growth Factor	\$ 52,483,059 1.0027
Sub-Total	\$ 52,624,763
Plus Prior Year PILOTS (N/A)	\$ -
Prior Year Exemptions (Capital Levy)	\$ (445,584)
Adjusted Prior Year Levy	\$ 52,179,179
Allowable Growth Factor (Lesser of CPI or 2%)	1.012300
Sub-Total	\$ 52,820,983
New Year PILOTs	\$ (25,891)
Sub-Total	\$ 52,795,092
Available Carryover (N/A)	\$ -
Tax Levy Limit Before Exclusions	\$ 52,795,092
New Year Exemptions (Capital Levy)	\$ 156,089
ERS / TRS Exemption (N/A)	\$ -
Tax Levy Limit With Exclusions	\$ 52,951,181
Final Tax Cap %	0.89%

VOTE TO APPROVE/DISAPPROVE THE BOCES ADMINISTRATIVE BUDGET FOR 2021-2022

OFFICIAL BALLOT

ESBOCES BOARD ELECTION TUESDAY, APRIL 20, 2021

Listed below are the five candidates who are running for the six (6) vacant seats on the Eastern Suffolk BOCES Board.

Please place an "X" next to the name of each candidate for whom a vote has been cast.	
Arlene Barresi 40 Pine Street Selden, NY 11784 (Middle Country CSD)	
Joseph LoSchiavo 144 Peconic Avenue Medford, NY 11763 (Patchogue-Medford UFSD)	
James F. McKenna 446 North Main Street Southampton, NY 11968 (Southampton UFSD)	
Brian O. Mealy 23601 Grand Avenue Mattituck, NY 11962 (Mattituck-Cutchogue UFSD)	
Robert P. Sweeney 28 Coventry Court Mount Sinai, NY 11766 (Mount Sinai UFSD)	
School District:	

Note: Please be sure the attached certification form has been signed by the Board Clerk or an authorized official. Place ballot and certification form in red envelope.

CERTIFICATION FOR ESBOCES BOARD ELECTION

l,	_, District Clerk	/Authorize	d Official of	the
	School [District, do	hereby cer	rtify
that, at a public meeting held on Tuesday	, April 20, 202	1, the Boa	rd of Educat	lion
of the	School	District	adopted	а
resolution casting its vote for the election	of members to	the Easteri	n Suffolk Bo	ard
of Cooperative Educational Services for	the person or	persons in	dicated on	the
attached ballot.				
,				
	ignature, Distri			

OFFICIAL BALLOT

ESBOCES ADMINISTRATIVE BUDGET VOTE TUESDAY, APRIL 20, 2021

Piease place 2021-22 Adm	e an "X" to indicate the Board of Education's vote on the ESBOCES ninistrative Budget.
	Resolution passed to approve the ESBOCES 2021-22 Administrative Budget
	Resolution passed not to approve the ESBOCES 2021-22 Administrative Budget
School Distric	ot:

Note: Please be sure the attached certification form has been signed by the Board Clerk or an authorized official. Place ballot and certification form in red envelope.

CERTIFICATION FOR ESBOCES ADMINISTRATIVE BUDGET VOTE

l,,	District Clerk/Authorized Official of the
School	District, do hereby certify that, at a
public meeting held on Tuesday, April 20), 2021, the Board of Education of the
School Distri	ct adopted a resolution casting its vote
on the Administrative Budget of the E	astern Suffolk Board of Cooperative
Educational Services for 2021-22.	
	•
Si	gnature, District Clerk/
O.	ther Authorized Official

ADOPTION OF BUDGET

Appointment of Poll Clerks and Tellers for the Annual Budget Vote and Election to be held on May 18, 2021.

Robert Pinnock Poll Clerk/Teller Arlene Heck Poll Clerk/Teller Anna Marie Nemes Poll Clerk/Teller Patricia Carr Poll Clerk/Teller

AGREEMENT

between

BOARD OF EDUCATION OF THE ROCKY POINT UNION FREE SCHOOL DISTRICT

and SUSAN WILSON

AGREEMENT, made as of the 20th day of April 2021 and between the Board of Education of the Rocky Point Union Free School District, Suffolk County, New York, and Susan Wilson, residing at 14 Dryad Road, Rocky Point, NY 11778.

WHEREAS, the Board of Education and Mrs. Wilson entered into an employment agreement, dated July 1, 2010 and extended through June 30, 2021, employing Susan Wilson as Executive Director for Educational Services; and

WHEREAS, that employment agreement provides at Paragraph 9 (b) for fifty percent (50%) payment for accrued unused sick leave and personal leave at 1/240 of her annual salary per day up to a maximum of 200 days at the time Mrs. Wilson retires from her employment with the District.

WHEREAS, the parties wish to implement the provisions referred to in paragraph (b) of said employment agreement;

NOW THEREFORE, for good and valuable consideration, receipt of which is hereby acknowledged, and intending to be legally bound thereby, the parties agree as follows:

All payment for accrued sick and personal leave as set forth herein shall be made as **Non-Elective Employer Contributions**, up to the statutory limit in accordance with Internal Revenue Code § 403 (b) in two separate payments. The first payment (up to the 2021 statutory limit) will be made the week of July 12, 2021; the remainder of the payment will be made the week of January 3, 2022.

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed as of the date and year first set forth above.

Susan Wilson

MEMORANDUM OF AGREEMENT

The negotiating teams representing the Board of Education of the Rocky Point Union Free School District No. 9 ("District") and the Rocky Point School-Related Professional Association ("Association") have negotiated in good faith with respect to the terms and conditions of employment for members of the Association. The parties agree that except as noted below, the terms and conditions of employment contained in the parties' 2014-2020 collective bargaining agreement shall remain in effect. The terms of this Memorandum of Agreement are subject to ratification by the bargaining unit and approval by the Board of Education. The negotiating teams hereby acknowledge their legal obligation to affirmatively recommend to their respective constituencies approval of this Memorandum of Agreement.

1. 5-Year Agreement (Article XVIII)

- a. July 1, 2020 June 30, 2025
- b. Update dates associated with contract cancellation language whereby effective date of termination is June 30, 2023 with a notification date of no later than March 1, 2023.

2. Article VI - Leaves

- a. Add item G: entitled "Accounting for Leave Accruals".
 - i. In the event a unit member is absent without accrued sick days, the District will charge absence(s) to unit member's available personal leave bank. When a unit member is absent without sick or personal days, the District will code absence to a member's available vacation leave time. If a unit member is absent without sick, personal or vacation days, the District will dock the unit member's routine per diem rate of pay for each day absent under these circumstances.

3. Article VII - Vacation

a. Revise item G to: All buildings and grounds and guards shall not be permitted to take vacation time during Rocky Point High School graduation week and the last week of August.

4. Article VIII - Work Year

- a. Revise item A to be: The work year for all ten (10) month clerical and buildings & grounds employees (with the exception of 10-month guards) shall begin September 1 and end June 30.
- b. Add new item B: 10-month guards shall work the same days as teachers including Rocky Point High School's annual graduation date; provided said graduation date occurs Monday-Friday and is on or before June 30.
- c. Revise first portion of item D: Normal work hours for full-time twelve (12) month clerical employees during the months of July and August shall be 8:00 a.m. 2:00 p.m., Monday through Thursday, excluding lunch and breaks. Remainder of item D to remain is.
- d. Revise first portion of item E: When a holiday listed in this Agreement, with the exception of Juneteenth, falls on a Saturday, another vacation day shall be granted contingent on school not being in session for other reasons on that day and upon the mutual agreement of the parties.
 - i. Add "Juneteenth" to List of Holidays on p. 14.

5. Article IX - Snow/Emergency Days

a. Add chart under 1st paragraph, "Conditions Associated with this Article are as follows":

Туре	Impact on Full-Time Unit Members	Impact on Part-Time Unit Members
Full-Day Closing	Full payment; no make-up of time needed.	Full payment; no make-up of time needed.
Early Dismissal	Full payment; no make-up of time needed.	Full payment; no make-up of time needed.
Delayed Opening	Full payment; no make-up of time needed.	Full payment; must make-up time for delay.

6. Article XI - Work Hours/Work Week

a. Revise item C in its entirety to read: Effective July 1, 2021 employees with shifts beginning anytime between 2:00 p.m. to 3:00 a.m. shall be paid at a rate of fourteen and three-tenths (14.3%) percent of their base wage. Remove second night differential percentage in current contract.

7. Article XII – Overtime

- a. Delete last sentence of Item D.
- b. Revise item B to state: Minimum overtime for Buildings & Grounds employees recalled to work in emergency situations shall be two hours.

8. Article XX – Wages

- a. Revise item D in its entirety to: Minimum salaries for all competitive and noncompetitive job titles shall be set forth in Appendix A. In the event the granting of any of these salaries results in the minimum compensation for a title to exceed the existing employee(s) in that title, the base salary of the existing employee(s) will be increased to the same level as the increased minimum compensation.
- b. Remove & replace item H in its entirety with the following:
 - i. Unit members shall receive their normal service-based increments set forth in Appendix B of this Agreement effective July 1 of each year. The corresponding service-based increment is to be added to each unit member's prior year salary.

The resulting salaries shall be increased as follows:

2020-21: 0.00%
2021-22: 2.00% *
2022-23: 2.00% **
2023-24: 1.50%
2024-25: 1.50%

- * Unit members first hired between 7/1/2020 and 6/30/2021 in any of the positions listed below, shall remain at service-based increment level zero (0) in 2021-2022 and will not receive their first service-based increment until 7/1/2022.
- ** Unit members first hired between 7/1/2021 and 6/30/2022 in any of the positions listed below, shall remain at service-based increment level zero (0) in 2022-2023 and will not receive their first service-based increment until 7/1/2023.

Impacted Positions:

Contractual School Hall Monitors, School Health Aides or School Teacher Aides. Hourly Attendance Aides, Office Assistants, Food Service Workers, School Hall Monitors, School Monitor or School Teacher Aides.

Salary Calculation for Illustrative Purposes:

				Applicable	Final			
<u>Position</u>	Prior Yr Service-Base Salary Increment				Preliminary Base Salary		Salary % Increase	New Year <u>Salary</u>
12-Month Office Assistant	\$27,080	+	\$960	=	\$28,040	x	1.00%	= \$28,320

c. Replace item J in its entirety with:

- i. Effective July 1, 2021, a Supplemental Student Assistance Stipend in the amount of \$1,000 per year shall be established in accordance with the following:
 - 1. The stipend will be paid to a unit member who is assigned to a child for a full day who "possesses special medical and/or personal assistance needs" and requires intervention related thereto. For a unit member assigned to a child for less than a full day, the stipend shall be prorated accordingly. The unit member, as a result of this assignment, accepts the responsibility to assist the child assigned to him/her, as needed. Supplemental student assistance shall not include any activities for which a professional license is required. Teacher Aides and Monitors are eligible for the stipend.
 - 2. While the District retains the discretion to select and assign unit members who will receive the stipend, the assignment in this regard is completely voluntary on the part of the employee. However, in the event that no unit member is willing to accept a given assignment, the Board may, in its sole discretion, recruit and appoint another individual to fulfill this need.
 - 3. Any employee who volunteers and is selected for the stipend, shall receive appropriate training provided by the District related to the specific assistance that may be required on behalf of the child.
 - 4. No assignment requiring medical intervention shall be made unless approved by the District's physician and is compliant with all applicable regulations and laws including guidance established by the New York State Education Department and District policy.
 - 5. Pursuant to applicable State Law, employees shall be represented and indemnified in the case of any lawsuit arising out of their job duties related to the stipend and will be covered by the District's liability insurance.

9. Article XXIII - Retirement Benefit

- a. Revise item A by removing the word "cash".
 - i. Employees who are fifty-five (55) or older and who elect to retire during the fiscal year shall receive a per-diem eash payment of one-half (½) of accumulated sick leave, such leave capped at two hundred fifty (250) days plus two hundred and fifty (\$250.00) dollars for each completed year of active service in the District.
- b. No changes to item B.
- c. Add new item C: Effective April 1, 2021 payment pursuant to this Article shall be in the form of a non-elective contribution to the unit member's authorized 403(b) account.

10. Appendix A - Minimum Starting Salaries

a. Adopted as set forth in MOA attachment.

11. Appendix B – Service-Based Increments

a. Adopted as set forth in MOA attachment.

12. Collective Bargaining Agreement - "Housekeeping" Items

- a. p. 1: Revise/Remove titles in accordance with updated Civil Service titles and District need.
- b. p. 2-4: Replace Article II: "Dues Deduction" & Article III: "Agency Fee" with language below.
 - The Rocky Point UFSD agrees to payroll deductions for Association members for membership dues. Members will authorize the payroll deductions of membership dues in accordance with the terms of the signed authorization cards. Such authorizations will remain in effect and continue from year-to-year unless revoked in writing by the member as set forth below or the member is no longer an employee of Rocky Point UFSD or unit member.
 - 2. Upon receipt of the written authorization directing payroll deduction, the Rocky Point UFSD shall deduct and remit the dues from the regular salary of each employee to the Association on a biweekly basis commencing with the second paycheck in September for 20 consecutive pay periods. For new hires, such deductions are to begin no later than thirty

- (30) days after the effective date of employment, provided written authorizations for payroll deductions have been received. The authorized dues deductions shall be transferred to the Association as soon as practicable, but in no event more than ten (10) calendar days from the date of deductions.
- Withdrawal of payroll dues deductions' authorizations must be made in writing to the Association with a copy to the Rocky Point UFSD Business Office within the window period of August 1st to 31st.
- 4. For each payroll period, the Rocky Point UFSD will provide the Association with a breakdown of dues deductions by member. Should a member who has authorized dues deduction be removed from Rocky Point UFSD's payroll or placed on an unpaid, involuntary or unpaid, voluntary leave of absence, such employee's membership in the Association shall be continued upon the employee's return to the payroll.
- 5. The Association agrees to hold the Rocky Point UFSD harmless from any claim, grievance, PERB proceeding, litigation or judgement arising from the membership dues deduction(s), unless said claim, proceeding or judgment is the result of Rocky Point UFSD's intentional action.
- 6. The Rocky Point UFSD assumes no liability or responsibility for the disposition of Association dues after they have been forwarded to the Association.
- c. p. 9: Item B to be: Up to five (5) days shall be granted for a death in the immediate family.
 - i. The immediate family includes the employee's husband, employee's wife, employee's son, employee's daughter, employee's sister, employee's brother, employee's father, employee's mother, employee's grandparent, employee's grandchild, employee's mother-in-law, employee's son-in-law, or employee's daughter-in-law.
 - ii. Up to two (2) days shall be granted in the event of the death of an employee's aunt, employee's uncle, spouse's grandparents, spouse's brother or spouse's sister.
- d. p. 21: Remove "AFLAC".

Dr. Scott O'Brien

Superintendent of Schools

- e. p. 23: Update last portion of sentence in Item A.
 - 1. From "move from step to step on the salary schedule on July 1st" to "receive their subsequent service-based increment on July 1st."
- f. p. 23: Remove item C; it is duplicative.
- g. Update lettering and numbering throughout CBA.

Dated: Rocky Point, NY2021	
For the Rocky Point UFSD:	For the Rocky Point School-Related Professionals Association:
Susan Y. Sullivan BOE, President	Theresa Schultz Union, President
San and a constant of the cons	41

APPENDIX A SRP Minimum Compensation by Title

Titles	2020-21	2021-22	2022-23	2023-24	2024-25
10 Month Groundskeeper I	30,089	31,593	31,593	33,173	33,173
10 Month Guard	27,000	28,350	28,350	29,768	29,768
10 Month Office Assistant	22,567	23,695	23,695	24,880	24,880
Account Clerk	32,239	33,851	33,851	35,544	35,544
Accountant	52,093	54,698	54,698	57,433	57,433
Assistant Cook (Hourly)	15.48	16.25	16.25	17.06	17.06
Attendance Aide (Hourly)	14.00	15.00	15.00	15.75	15.75
Computer Lab Assistant	29,660	31,143	31,143	32,700	32,700
Custodial Worker I	32,500	34,125	34,125	35,831	35,831
Custodial Worker I (Hourly)	15.00	15.75	15.75	16.54	16.54
Custodial Worker III	33,467	35,140	35,140	36,897	36,897
Food Service Worker (Hourly)	14.00	15.00	15.00	15.00	15.00
Groundskeeper I	39,500	41,475	41,475	43,549	43,549
Groundskeeper I (Hourly)	18.19	19.10	19.10	20.06	20.06
Groundskeeper II	44,500	46,725	46,725	49,061	49,061
Guard	32,400	34,020	34,020	35,721	35,721
Guard (Hourly)	18.00	18.90	18.90	19.85	19.85
Guard/Driver/Messenger	31,317	32,883	32,883	34,527	34,527
Head Custodian	41,265	43,328	43,328	45,494	45,494
Lead Food Service Worker	21,922	23,018	23,018	24,169	24,169
Maintenance Mechanic III	39,300	41,265	41,265	43,328	43,328
Maintenance Mechanic III (Hourly)	19.81	21.00	21.00	22.05	22.05
Office Application Specialist	49,125	51,581	51,581	54,160	54,160
Office Assistant	27,080	28,434	28,434	29,856	29,856
Office Assistant (Hourly)	14.00	15.00	15.00	15.75	15.75
Principal Account Clerk	68,879	72,323	72,323	75,939	75,939
Principal Office Assistant	38,041	39,943	39,943	41,940	41,940
Principal Stenographer	38,041	39,943	39,943	41,940	41,940
School Communication Coordinator	58,029	60,930	60,930	63,977	63,977
School Hall Monitor	19,600	21,000	21,000	22,050	22,050
School Hall Monitor (Hourly)	14.00	15.00	15.00	15.75	15.75
School Health Aide	19,600	21,000	21,000	22,050	22,050
School Monitor (Hourly)	14.00	15.00	15.00	15.75	15.75
School Nurse	40,000	42,000	42,000	44,100	44,100
School Nurse (Hourly)	28.00	28.00	28.00	28.00	28.00
School Teacher Aide	19,600	21,000	21,000	22,050	22,050
School Teacher Aide (Hourly)	14.00	15.00	15.00	15.75	15.75
Secretarial Assistant/Administrative Assistant	43,411	45,582	45,582	47,861	47,861
Senior Account Clerk	34,173	35,882	35,882	37,676	37,676
Senior Guard	32,545	34,172	34,172	35,881	35,881
Senior Office Assistant/Senior Stenographer	34,173	35,882	35,882	37,676	37,676

.PPENDIX B ervice-Based Increments

tul -	Τ.	Τ.	Τ.	Τ.	Γ.							T					T								1					
itle	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30
0 Month Groundskeeper I	1,010			1,104		_	_	1,242			_	1,398		_	1,528			1,669				1,879	_	1,993			2,178		2,311	2,380
0 Month Guard	875	901	928	956	985	1,014	1,045	1,076	1,108	1,142	1,176		1,248	1,285	1,324	1,363		1,446	1,490	1,534	1,580	1,628	_	1,727			1,887	1,944	2,002	2,062
0 Month Office Assistant	800	824	849	874	900	927	955		-,			1,107		1,175			1,284	1,322		1,403		1,488		1,579		1,675		1,777	1,830	1,885
ccount Clerk	1,200	1,236	1,273	1,311	1,351	1,391	1,433	1,476	1,520	1,566	1,613	1,661	1,711	1,762	1,815	1,870	1,926	1,983	2,043	2,104	2,167	2,232	_	2,368		2,513	2,588	2,666	2,746	2,828
ccountant	1,858	1,924	1,981	2,041	-,	2,165	2,230					2,585	2,663	2,742	2,825	_,	2,997	3,087	3,179	3,275	3,373	3,474			_		4,027	4,148	4,273	4,401
ssistant Cook (Hourly)	0.52	0.54	0.55	0.57	0.59	0.6	0.62	0.64	0.66	0.68	0.70	0.72	0.74	0.76	0.79	0.81	0.83	0.86	0.89	0.91	0.94	0.97	1.00	1.03	1.06	1.09	1.12	1.16	1.19	1.23
ttendance Alde (Hourly)	0.40	0.41	0.42	0.44	0.45	0.46	0.48	0.49	0.51	0.52	0.54	0.55	0.57	0.59	0.61	0.62	0.64	0.66	0.68	0.70		0.74	0.77	0.79	0.81			0.89		0.94
omputer Lab Assistant	1,000	1,030	1,061	1,093	1,126	1,159	1,194	1,230	1,267	1,305	1,344	1,384	,	1,469	1,513	1,558	1,605	1,653	1,702	1,754	1,806				2,033	2,094			2,288	2,357
ustodial Worker I	1,030	1,061	1,093	1,126	1,159	1,194	1,230	1,267	1,305	1,344	1,384	1,426	1,469	1,513	1,558	1,605	1,653	1,702	1,754	1,806	1,860	1,916	1,974	2,033	2,094	2,157	2,221	2,288	2,357	2,427
ustodial Worker I (Hourly)	0.40	0.41	0.42	0.44	0.45	0.46	0.48		0.51	0.52	0.54	0.55	0.57	0.59	0.61	0.62	0.64	0.66	0.68	0.70		0.74		0.79	0.81	0.84	0.86	0.89	0.92	0.94
ustodial Worker III	1,280	1,318	1,358	1,399	1,441	1,484	1,528	1,574	1,621	1,670	1,720	1,772	1,825	1,880	1,936	1,994	2,054	2,116	2,179	2,244	2,312	2,381	2,453	2,526	2,602		2,760	2,843	2,929	3,016
ood Service Worker (Hourly)	0.40	0.41	0.42	0.44	0.45	0.46	0.48	0.49	0.51	0.52	0.54	0.55	0.57	0.59	0.61	0.62	0.64	0.66	0.68	0.70	0.72	0.74		0.79			0.86	0.89	0.92	0.94
roundskeeper I	1,212	1,248	1,286	1,324	1,364	1,405	1,447	1,491	1,535	1,581	1,629	1,678	1,728		1,833	1,888	1,945	2,003	2,063	2,125	,				2,464	2,538	2,614		2,773	2,856
roundskeeper I (Hourly)	0.67	0.69	0.71	0.73	0.75	0.78	0.80	0.82	0.85	0.87	0.90	0.93	0.96	0.99	1.02	1.05	1.08	1.11	1.15	1.18	1.22	1.25	1.29	1.33	1.37	1.41	1.45	1.50	1.54	1.59
roundskeeper II	1,400	1,442	1,485	1,530	1,576	1,623	1,672	1,722	1,773	1,827	1,881	1,938	1,996	2,056	2,118	2,181	2,247	2,314	2,383	2,455	2,529	2,604	2,683	2,763	2,846	2,931			3,203	3,299
uard	1,050	1,082	1,114	1,147	1,182	1,217	1,254	1,291	1,330	1,370	1,411	1,453	1,497	1,542	1,588	1,636	1,685	1,735	1,788	1,841	1,896	1,953	2,012	2,072	2,134	2,198	2,264	2,332	2,402	2,474
uard (Hourly)	0.58	0.60	0.62	0.63	0.65	0.67	0.69	0.71	0.73	0.76	0.78	0.80	0.83	0.85	0.88	0.90	0.93	0.96	0.99	1.02	1.05	1.08	1.11	1.14	1.18	1.21		1.29	1.33	1.37
uard/Driver/Messenger	1,050	1,082	1,114	1,147	1,182	1,217	1,254	1,291	1,330	1,370	1,411	1,453	1,497	1,542	1,588	1,636	1,685	1,735	1,788	1,841	1,896	1,953	2,012	2,072	2,134	2,198	2,264	2,332	2,402	2,474
ead Custodian	1,680	1,730	1,782	1,836	1,891	1,948	2,006	2,066	2,128	2,192	2,258	2,326	2,395	2,467	2,541	2,617	2,696	2,777		2,946	-,	3,125	3,219	3,316	3,415	3,518	3,623	3,732	3,844	3,959
ead Food Service Worker	740	762	785	809	833	858	884	910	937	966	994	1,024	1,055	1,087	1,119	1,153	1,187	1,223	1,260	1,298	1,337	1,377	1,418	1,460	1,504	1,549	1,596	1,644	1,693	1,744
laintenance Mechanic III	1,600	1,648	1,697	1,748	1,801	1,855	1,910	1,968	2,027	2,088	2,150	2,215	2,281	2,350	2,420	2,493	2,568	2,645	2,724	2,806	2,890	2,976	3,066	3,158	3,252	3,350	3,451	3,554	3,661	3,771
laintenance Mechanic III (Hourly)	0.89	0.92	0.94	0.97	1.00	1.03	1.06	1.09	1.13	1.16	1.20	1.23	1.27	1.31	1.35	1.39	1.43				1.61	1.66	1.71	1.76	1.81	1.87	1.92	1.98	2.04	2.10
ffice Application Specialist	1,660	1,710	1,761	1,814	1,868	1,924	1,982	2,042	2,103	2,166	2,231	2,298	2,367	2,438	2,511	2,586	2,664				2,998	-,	.,	3,276	3,374	3,476	3,580	3,687	3,798	3,912
ffice Assistant	960	989	1,018	1,049	1,080	1,113	1,146	1,181	1,216	1,253	1,290	1,329	1,369	1,410	1,452	1,496	1,541	1,587	1,634	1,683	1,734	1,786	1,839	1,895	1,951	2,010	2,070	2,132	2,196	2,262
ffice Assistant (Hourly)	0.40	0.41	0.42	0.44	0.45	0.46	0.48	0.49	0.51	0.52	0.54	0.55	0.57	0.59	0.61	0.62	0.64	0.66	0.68		0.72	0.74	0.77	0.79	0.81	0.84	0.86	0.89	0.92	0.94
incipal Account Clerk	2,470	2,544	2,619	2,699	2,779	2,863	2,949	3,037	3,128	3,222	3,319	3,418	3,521	3,626	3,735				4,203	4,330	4,460	4,593	4,731	4,874	5,019	5,170	5,325	5,485	5,650	5,819
incipal Office Assistant	1,620	1,669	1,719	1,770	1,823	1,878	1,934	1,992	2,052	2,114	2,177	2,242	2,310				2,600		2,758	2,841	2,926	3,014		-,	3,293	3,392	3,494	3,598	3,706	3,818
incipal Stenographer	1,620	1,669	1,719	1,770	1,823	1,878	1,934	1,992	2,052	2,114	2,177	2,242	2,310	2,379	2,450					2,841		3,014	3,104	3,197	3,293	3,392	3,494	3,598	3,706	3,818
chool Communication Coord	1,960	2,019	2,079	2,142	2,206	2,272	2,340	2,411	2,483	2,557	2,634	2,713	2,794	2,878	2,965	3,054	3,145	3,240		3,437	3,540	3,646	3,756	3,868	3,984	4,104	4,227	1,354	4,484	4,619
:hool Hall Monitor	568	585	603	621	639	658	678	699		741	763	786		834	859	885	911	939	967	996	1,026	1,057	1,088	1,121	1,155	1,189	1,225 :	,262	1,300 1	1,339
thool Hall Monitor (Hourly)	0.40	0.41	0.42	0.44	0.45	0.46	0.48	0.49	0.51	0.52	0.54	0.55	0.57	0.59	0.61				0.68									0.89	0.92	0.94
thoo! Health Aide	740	762	785	809	833	858	884	910	937	966	994	1,024	1,055	1,087	1,119	1,153	1,187	1,223	1,260	1,298	1,337	1,377	1,418	1,460	1,504	1,549	1,596	,644	1,693 1	1,744
:hool Monitor (Hourly)	0.40	0.41	0.42	0.44	0.45	0.46	0.48	0.49	0.51	0.52	0.54	0.55	0.57			0.62								0.79	0.81	0.84	0.86	0.89	0.92	0.94
thool Nurse	1,360	1,401	1,443	1,486	1,531	1,577			1,723	1,774	1,828	1,883	1,939	1,997	2,057							2,530		2,684	2,765	2,848	2,933	,021	3,112 3	3,205
:hool Nurse (Hourly)	0.97	1.00	1.03	1.06	1.09	1.12	1.16	1.19	1.23	1.27	1.30	1.34	1.38	1.42	1.47	1.51	1.56	1.60	1.65	1.70	1.75	1.80	1.86	1.91	1.97	2.03	2.09	2.15	2.22	2.29
:hool Teacher Aide	568	585	603	621	639	658	678	699	720	741	763	786	810	834	859	885	911	939	967	996	1,026 1	1,057	1,088	1,121	1,155	1,189	1,225 1	,262	1,300 1	1,339
hool Teacher Aide (Hourly)	0.40	0.41	0.42	0.44	0.45	0.46	0.48	0.49	0.51	0.52	0.54	0.55	0.57	0.59	0.61	0.62	0.64	0.66	0.68	0.70	0.72	0.74	0.77	0.79	0.81	0.84	0.86	0.89	0.92	0.94
cretarial Assistant/Administrative Assistant	1,557	1,603	1,651	1,701	1,752	1,804	1,858	1,914	1,971	2,031	2,091	2,154	2,219	2,285	2,354	2,425	2,497	2,572	2,649	2,729	2,811 2	2,895	2,982	3,071	3,164	3,258	3,356	,457	3,561 3	3,667
nior Account Clerk	1,320	1,360	1,400	1,442	1,486	1,530	1,576	1,623	1,672	1,722	1,774	1,827	1,882	1,938	1,997	2,057	2,118	2,182	2,247	2,315	2,384 2	2,456	2,529	2,605	2,683	2,764	2,847 2	,932	3,020 3	3,111
nior Guard	1,200	1,236	1,273	1,311	1,351	1,391	1,433	1,476	,520	1,566	1,613	1,661	1,711	1,762	1,815	1,870	1,926	1,983	2,043	2,104	2,167 2	2,232	2,299	2,368	2,439	2,513 2	2,588 2	,666	2,746 2	.,828
nior Office Assistant/Senior Stenographer	1,400	1,442	1,485	1,530	1,576	1,623	1,672	1,722	,773	1,827	1,881	1,938	1,996	2,056	2,118	2,181	2,247	2,314	2,383	2,455	2,529 2	2,604	2,683	2,763	2,846	2,931	3,019	,110	3,203 3	,299

4/20/21 Schedule-A Classified Staff

Last	First	Position	Building	Rate	BOE Date	Amount	Effective Date	Description/Comments
Thomsen	Ann	Office Assistant	HS	N/A	4/20/2021	N/A	3/31/2021	Resignation for personal reasons
Liu	Hui	Senior Account Clerk	DO	N/A	4/20/2021	N/A	3/23/2021	Unpaid FMLA leave of absence commencing 3/23/2021 half day p.m. through 5/26/2021 for medical reasons
Bucher	Kathleen	Senior Office Assistant	JAE	N/A	4/20/2021	N/A	3/24/2021	Resignation for personal reasons
Joy	Richard	Part-Time Weekend Custodian	DW	N/A	4/20/2021	N/A	3/24/2021	Resignation for personal reasons
Ruocco	John	Custodial Worker I	DW	N/A	4/20/2021	N/A	4/9/2021	Resignation for personal reasons
Cambridge	Jennafer	Senior Office Assistant	JAE	N/A	4/20/2021	N/A	4/20/2021	Change in status from promotional contingent appointment to permanent contractual appointment. Replaces K. Bucher.
Ortiz	Ellen	School Hall Monitor	HS	N/A	4/20/2021	N/A	4/20/2021	Amended appointment from contingent to part- time (5 days per week, 4 hours per day) ten-month contractual appointment. Replaces P. Vassallo
Maier	Carol	Principal Office Assistant	DO	Annual - Step 6	4/20/2021	41,109	4/8/2021	Change in title as per Civil Service Rules and Regulations from Senior Office Assistant to a provisional promotional appointment as a Principal Office Assistant. Salary pro-rated.
Loughlin	Melanie	School Lunch Monitor	DW	N/A	4/20/2021	N/A	4/20/2021	Resignation of part-time lunch monitor appointment to accept hall monitor appointment.
Loughlin	Melanie	School Hall Monitor	MS	Hourly - Step 0	4/20/2021	14.00	4/21/2021	Part-time (4 hours per day, 5 days per week) ten- month contractual appointment. Replaces J. Saporita.
Delucia	Donna	School Teacher Aide	HS	Annual	4/20/2021	750.00	11/30/2020	Amended Supplemental Student Assistance Stipend 2020-2021 school year; Salary pro-rated - 4x per week.
Delucia	Donna	School Teacher Aide	HS	Annual	4/20/2021	750.00	3/1/2021	Amended Supplemental Student Assistance Stipend 2020-2021 school year - 5x week.
Durney	John	Custodial Worker I	DW	N/A	4/20/2021	N/A	4/20/2021	Inactivation of 2020-2021 school year appointment in order to accept a full time position.
Durney	John	Custodial Worker I	DW	Annual - Step 0	4/20/2021	32,500	4/21/2021	Full time, twelve-month, probationary contractual appointment. Replaces J. Ruocco. Salary prorated.

4/20/21 Schedule-B Certified Staff

Last	First	Position	Bldg.	Rate	BOE Date	Amount	Effective Date	Description/Comments
Castro-Crowell	Ann	Reading Teacher	FJC	N/A	4/20/2021	N/A	6/30/2021	Resignation for the purpose of retirement

4/20/21 Schedule-C Non-Teaching Substitutes

Last	First	Position	Bldg.	Rate	BOE Date	Amount	Effective Date	Description/Comments
Picarella	Luciano	Substitute Custodian	DW	Hourly	4/20/2021	15.00	4/22/2021	2020-2021 school year
Ruocco	John	Substitute Custodian	DW	Hourly	4/20/2021	15.00	4/10/2021	2020-2021 school year

4/20/21 Schedule-D Teaching/Certified Substitutes

Last	First	Position	Bldg.	Rate	BOE Date	Amount	Effective Date	Description/Comments
Covello-Mazlin	Barbara	Per Diem Substitute Teacher/Teaching Assistant	DW	N/A	4/20/2021	N/A	3/16/2021	Resignation of 2020-2021 appointment
Haviland	Meagan	Per Diem Substitute Teacher/Teaching Assistant	DW	Daily	4/20/2021	125.00 non preferred; 150.00 preferred	4/22/2021	2020-2021 school year
Donofrio	Grace	Per Diem Substitute Teacher/Teaching Assistant	DW	Daily	4/20/2021	125.00 non preferred; 150.00 preferred	4/22/2021	2020-2021 school year
Shanahan	Caitlin	Per Diem Substitute Teacher/Teaching Assistant	DW	Daily	4/20/2021	125.00 non preferred; 150.00 preferred	4/22/2021	2020-2021 school year. Conditional appointment.
Ruisi	Stephen	Per Diem Substitute Teacher/Teaching Assistant	DW	Daily	4/20/2021	125.00 non preferred; 150.00 preferred	4/22/2021	2020-2021 school year
Alderman	Andrew	Per Diem Substitute Teacher/Teaching Assistant	DW	Daily	4/20/2021	125.00 non preferred; 150.00 preferred	4/22/2021	2020-2021 school year

4/20/21 Schedule-E Co-Curricular Positions 2020/2021

Last	First	Position	Bldg.	Rate	BOE Date	Amount	Effective Date	Description/Comments
Klints	Chelsea	Chaperone	DW DW	Hourly	4/20/2021	See below*	3/5/2021	2020-2021 school year
Russo	Adrienne	Chaperone	DW	Hourly	4/20/2021	See below*		2020-2021 school year
Nusso	Adrienne		DVV	riourly	4/20/2021	See below	3/22/2021	2020-2021 Scilool year
Poulos	Diana	Chaperone	DW	Hourly	4/20/2021	See below*	4/12/2021	2020-2021 school year
Calamita	Kelly	MS Field Hockey (Year 6)	DW	Annual	4/20/2021	4,444	3/1/2021	Amended salary. Coaching appointment 2020 -2021 school year. Salary will be pro-rated if season is ended prematurely.
Costa	Jean	Curriculum Writing	DW	Hourly	4/20/2021	49.00	3/16/2021	Amended Grade Levels from Grades K-2 to Grades 3-5 Social Emotional. Funded through General Fund. Up to fifteen (15) hours. Project completion by 6/25/21.
Donadoni	Danielle	MS Garden Club	MS	Annual	10/19/2020	1,249	4/6/2021	2020-2021 school year. Stipend pro-rated.
Apicella	Ryan	MS Baseball	DW	N/A	4/20/2021	N/A	3/29/2021	Resignation of 2020-2021 coaching appointment
Panella	Patrick	MS Girls Track (Year 16)	DW	N/A	4/20/2021	N/A	4/15/2021	Resignation of 2020-2021 coaching appointment
Gallino	Nicole	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade K Scope & Sequence Literacy Program. Funded through Title IIA Grant. Up to thirty-five (35) hours. 2020/2021 Grant funded ending 8/13/2021.
Gerbino	Jessica	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade K Scope & Sequence Literacy Program. Funded through Title IIA Grant. Up to thirty-five (35) hours. 2020/2021 Grant funded ending 8/13/2021.
Golding	Jennifer	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade K Scope & Sequence Literacy Program. Funded through Title IIA Grant. Up to ten (10) hours. 2020/2021 Grant funded ending 8/13/2021.
Casswell	Carrie	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade 1 Scope & Sequence Literacy Program. Funded through Title IIA Grant. Up to seventy (70) hours. 2020/2021 Grant funded ending 8/13/2021.
Golding	Jennifer	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade 1 Scope & Sequence Literacy Program. Funded through Title IIA Grant. Up to ten (10) hours. 2020/2021 Grant funded ending 8/13/2021.
Golding	Jennifer	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade 2 Scope & Sequence Literacy Program. Funded through Title IIA Grant. Up to eighty (80) hours. 2020/2021 Grant funded ending 8/13/2021.

Marte	Gina	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade 3 Scope & Sequence Literacy Program. Funded through Title IIA Grant. Up to sixty (60) hours. 2020/2021 Grant funded ending 8/13/2021.
Oliveto	AnnMarie	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade 3 Scope & Sequence Literacy Program. Funded through Title IIA Grant. Up to twenty (20) hours. 2020/2021 Grant funded ending 8/13/2021.
Friscia	Michael	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade 4 Scope & Sequence New Literacy Program. Funded through Title IIA Grant. Up to twenty-four (24) hours. 2020/2021 Grant funded ending 8/13/2021.
Jackson	Kristie	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade 4 Scope & Sequence New Literacy Program. Funded through Title IIA Grant. Up to twenty-three (23) hours. 2020/2021 Grant funded ending 8/13/2021.
Ross-Licata	Allison	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade 4 Scope & Sequence New Literacy Program. Funded through Title IIA Grant. Up to twenty-three (23) hours. 2020/2021 Grant funded ending 8/13/2021.
Oliveto	AnnMarie	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade 4 Scope & Sequence Literacy Program. Funded through Title IIA Grant. Up to ten (10) hours. 2020/2021 Grant funded ending 8/13/2021.
Arnesen	Jaimie	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade 5 Scope & Sequence Literacy Program. Funded through Title IIA Grant. Up to sixty (60) hours. 2020/2021 Grant funded ending 8/13/2021.
Oliveto	AnnMarie	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade 5 Scope & Sequence Literacy Program. Funded through Title IIA Grant. Up to twenty (20) hours. 2020/2021 Grant funded ending 8/13/2021.
Donadoni	Danielle	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade 6 Scope & Sequence Literacy Program. Funded through Title IIA Grant. Up to thirty-five (35) hours. 2020/2021 Grant funded ending 8/13/2021.
Сох	Jessica	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade 6 Scope & Sequence Literacy Program. Funded through Title IIA Grant. Up to thirty-five (35) hours. 2020/2021 Grant funded ending 8/13/2021.
Parise	Megan	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade 6 Scope & Sequence Literacy Program. Funded through Title IIA Grant. Up to ten (10) hours. 2020/2021 Grant funded ending 8/13/2021.
Tsavos	Jon	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade 7 Scope & Sequence Literacy Program. Funded through Title IIA Grant. Up to eighty (80) hours. 2020/2021 Grant funded ending 8/13/2021.

Scott	Patrica	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade 8 Scope & Sequence Literacy Program. Funded through Title IIA Grant. Up to forty (40) hours. 2020/2021 Grant funded ending 8/13/2021.
Schumacher	Sarah	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Grade 8 Scope & Sequence Literacy Program. Funded through Title IIA Grant. Up to forty (40) hours. 2020/2021 Grant funded ending 8/13/2021.
Muratore	Kristina	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Self-Contained Geometry Scope & Sequence. Funded through Title IIA Grant. Up to sixty (60) hours. 2020/2021 Grant funded ending 8/13/2021.
DiCristo	Elizabeth	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Self-Contained Algebra Scope & Sequence. Funded through Title IIA Grant. Up to sixty (60) hours. 2020/2021 Grant funded ending 8/13/2021.
Schumacher	John	Curriculum Writing	DW	Hourly	4/20/2021	49.00	4/21/2021	Principles of Engineering Scope & Sequence. Funded through Title IIA Grant. Up to one hundred and twelve (112) hours. 2020/2021 Grant funded ending 8/13/2021.

^{*}Up to two hours: \$55.00; in excess of two hours: \$83.00; Junior/Senior Prom: \$55.00 per hour 2020/2021 school year

4/20/21 Schedule-F Community Education

Last	First	Position	Bldg.	Rate	BOE Date	Amount	Effective Date	Description/Comments
None								

Smart Schools Bond Act

Rocky Point UFSD—BOE and Community Presentation

April 20, 2021



SMART SCHOOLS BOND ACT OF 2014

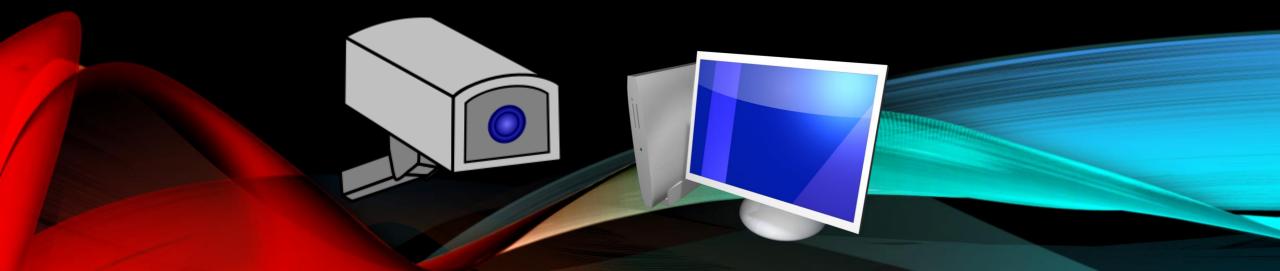
New York's Smart Schools Bond Act was approved by NYS voters on November 4, 2014. The bond act is intended to provide school districts with funding for new educational technology and infrastructure improvements to enhance learning opportunities for all students across the state.

Yes 61.94%



AREAS OF POSSIBLE INVESTMENT

- High speed broadband/wireless connectivity
- Learning technology equipment
- High-tech security features on campus



ROCKY POINT ALLOCATION

- One-time allocation
- No deadlines for submission
- Funds do not expire
- Funds can be reimbursed on an ongoing basis

\$2,450,155

WHAT ARE THE STEPS?

- Review allocation amount
- Identify district needs
- Stakeholder engagement
- Capital planning discussion
- Instructional technology plan
 - ✓ Submitted and approved

- Preliminary Plan submission to BOE
 - √ 30-day review April 20 to May 20, 2021
 - ✓ Public comments accepted
- Public Hearings
 - ✓ April 20, 2021
 - ✓ June 14, 2021
- Final plan & BOE approval
- Submit to SED

SMART SCHOOLS IT CONSIDERATIONS

Requires linkage to the District's Instructional Technology Plan which addresses gaps in the District's current level of technology including:

- All items related to network infrastructure to support required increase of wired network, wireless network, and broadband internet access.
- All items related to classroom equipment, learning technology equipment, and student/teacher devices.

OUR STAKEHOLDERS

- Teachers (4-6)
- Students (varies)
- Parents (2-4)
- BOE Member (1)
- Principals/Assistant Principals (4)
- Academic Department Directors/Coordinators/Chairs (2-4)
- Technology Integration Specialist (1)
- District Tech Support (2)
- Assistant Superintendent for Business (1)
- Assistant Superintendent (1)
- Executive Director for Educational Services (1)
- Higher Education (1)

PHASE I PROJECT

(NYSED APPROVED)

Proposed Cost Wireless Network \$1,035,000

Actual Cost
 \$ 879,015

Amount available for use (amendment needed) \$ 155,985

PROPOSED AMENDMENT

Network Closet Cooling Systems

(MUST BE BOE AND NYSED APPROVED)

- Some network closets experience extremely high temperatures.
- Over the past two years, our closet infrastructure has grown—cameras and WiFi installation. The future will include a new IP phone system.
- Cooling the selected closets would help the District to preserve their investment and protect the switches/servers.
- When closets overheat, they will shut down until they become cooler.
- We have 19 closets in total; we would select 7 of the closets most in need.

Approximate cost of cooling 7 select network closets \$155,985

Comment Period

- In accordance with New York State law, the Rocky Point Union Free School District is offering a 30-day comment period for our community to provide input on the district's amendment to the Smart Schools Bonds Act Phase I Plan.
 - Susan Wilson, Executive Director for Educational Services
 - swilson@rpufsd.org

Next Technology Meeting

(Open to the Public)

April 28, 2021 @ 3 PM

THANK YOU