

Hamilton County Department of Education  
Hamilton County Board of Education Board Meeting - Regular Session  
October 9, 2025 6:00 PM  
3074 Claude Ramsey Parkway  
Chattanooga, TN 37421

I. Roll Call

II. \*\*Approval of the Agenda

III. Executive Session - October 6, 2025

IV. Pledge to the Flag and Meditation - Dr. Lindsay Starnes, Principal of Clifton Hills Elementary

V. Exemplars of Excellence

VI. Board Member Disclaimer Statement - I declare that I have a [spouse, parent, grandparent, child, sibling, aunt, uncle, nephew, niece, relation-in-law or member of my household] who works for the school system and that the Board's vote on [budget, policies, etc.] may have an effect on my relative's employment. Even so, I hereby certify that I will cast my vote in the best interest of the school system.

VII. \*\*Approval of the Consent Agenda

A. Approval of the Minutes of the September 2025 Quarterly Session

B. Executive Committee Report

C. Deputy Superintendent - Dr. Sonia Stewart

1. Field Trips

a. Dr. Elaine Harper - Community Superintendent, Harrison Bay

b. Dr. Lee Ziegler - Community Superintendent, North River

c. Dr. Shane Harwood - Community Superintendent, Rock Point

d. Dr. Marques Stewart - Community Superintendent, Missionary Ridge

D. Chief Financial Officer - Mary Ellen Heuton, CPA

1. Financial Reports

2. Budget Amendments

a. Federal Grants, State Grants, and Self-Funded Programs

b. General Operating Amendments

c. Self-Funded Program - Cigna Property

E. Chief Strategy Officer - Shannon Moody

1. Policies on First Read

1.400 School Board Meetings

2. Proposed Policy Revision, Final Read

1.806 Advertising and Distribution of Materials in the Schools

1.407 School District Records

1.700 School Board Goals

1.701 School District Planning

3. TISA Accountability Report

VIII. Administrative Business Matters

A. Chief Talent Officer - Dr. Zac Brown

1. \*\*Request for New and Updated Job Class Description

2. \*\*PECCA Special Questions Committee

B. Chief Operations Officer - Dr. Robert Sharpe

1. \*\*Brainerd/Dalewood Architect Contract

C. Chief Strategy Officer - Shannon Moody

1. \*\*RFP Review Committee

IX. Board Matters

A. A. Ben Connor - District 6

\*\* MOU with Centerstone Mental Health Center, Inc., with the language addition:

- Centerstone will prioritize scheduling student sessions during non-instructional time. The parents/guardians will be made aware of and approve in writing the classes their student will be missing for sessions.

B. C. Joe Smith - Board Chairman

\*\*Committee Chairs and Vice Chairs for 2025-2026

- Athletics - Chair
- Facilities - Chair and Vice Chair
- Finance - Chair
- Policy - Chair and Vice Chair
- School Safety - Chair and Vice Chair
- Transportation - Chair

X. Information Only

A. Legal Services Report

XI. Events/Announcements

October 13-17

Fall Break

Monday, October 20

Professional Development

Thursday, October 23, 5:30pm

Finance Committee Meeting

Thursday, November 20, 4:30pm

Work Session

Thursday, November 20, 6:00pm

Regular Meeting

XII. Adjourn

**Minutes**

**Hamilton County Department of Education**

**Hamilton County Board of Education Board Meeting – Quarterly Session**

September 18, 2025, 6:00 P.M.

Board Room

3074 Claude Ramsey Pkwy

Chattanooga, TN 37421

Attendance taken at 6:01 P.M.

Mrs. Jill Black: Present

Mr. Ben Connor: Present

Mr. Ben Daugherty: Present

Mr. Larry Grohn: Present

Mrs. Felice Hadden: Present

Mrs. Karitsa Jones: Present

Mr. Gary Kuehn: Present

Mrs. Jodi Schaffer: Present

Mr. Steve Slater: Present

Mr. Joe Smith: Present

Ms. Jackie Thomas: Present

Superintendent Dr. Justin Robertson was present.

**I. Roll Call**

**II. Election of Officers**

**Failed:** Motion to elect Mrs. Karitsa Jones as Board Chair for the 2025-26 Term.

Motion by Ms. Jackie Thomas and a Second by Mr. Ben Connor.

**Passed:** Motion to elect Mr. Joe Smith as Board Chair for the 2025-26 Term.

Passed with a Motion by Mr. Gary Kuehn and a Second by Mr. Ben Daugherty.

Mr. Joe Smith: Joe Smith

Mrs. Jill Black: Karitsa Jones

Mr. Ben Connor: Karitsa Jones

Mr. Ben Daugherty: Joe Smith

Mr. Larry Grohn: Joe Smith

Mrs. Felice Hadden: Joe Smith

Mrs. Karitsa Jones: Karitsa Jones

Mr. Gary Kuehn: Joe Smith

Mrs. Jodi Schaffer: Joe Smith

Mr. Steve Slater: Joe Smith

Ms. Jackie Thomas: Karitsa Jones

Joe Smith: 7; Karitsa Jones: 4

**Passed:** Motion to elect Mr. Gary Kuehn as Board Vice Chair for the 2025-26 Term.

Passed with a Motion by Mr. Steve Slater and a Second by Mr. Larry Grohn.

Mr. Joe Smith:	Yes
Mrs. Jill Black:	Yes
Mr. Ben Connor:	Abstain
Mr. Ben Daugherty:	Yes
Mr. Larry Grohn:	Yes
Mrs. Felice Hadden:	Yes
Mrs. Karitsa Jones:	No
Mr. Gary Kuehn	Yes
Mrs. Jodi Schaffer:	Yes
Mr. Steve Slater:	Yes
Ms. Jackie Thomas:	Yes
Yes: 9; No: 1; Abstain: 1	

**Failed:** Motion to select Mr. Ben Connor as Legislative Liaison for the 2025-26 Term.

Motion by Ms. Jackie Thomas and a Second by Mrs. Jill Black.

**Passed:** Motion to elect Mrs. Jodi Schaffer as Legislative Liaison for the 2025-26 Term.

Passed with a Motion by Mr. Ben Daugherty and a Second by Mr. Larry Grohn.

Mr. Joe Smith:	Jodi Schaffer
Mrs. Jill Black:	Ben Connor
Mr. Ben Connor:	Ben Connor
Mr. Ben Daugherty:	Jodi Schaffer
Mr. Larry Grohn:	Jodi Schaffer
Mrs. Felice Hadden:	Jodi Schaffer
Mrs. Karitsa Jones:	Ben Connor
Mr. Gary Kuehn	Jodi Schaffer
Mrs. Jodi Schaffer:	Jodi Schaffer
Mr. Steve Slater:	Jodi Schaffer
Ms. Jackie Thomas:	Ben Connor
Jodi Schaffer: 7; Ben Connor: 4	

**III. \*\*Approval of the Agenda**

**Passed:** Motion to Approve the Agenda.

Passed with a Motion by Mr. Larry Grohn and a Second by Mr. Steve Slater.

Mr. Joe Smith: Yes  
Mrs. Jill Black: Yes  
Mr. Ben Connor: Yes  
Mr. Ben Daugherty: Yes  
Mr. Larry Grohn: Yes  
Mrs. Felice Hadden: Yes  
Mrs. Karitsa Jones: Yes  
Mr. Gary Kuehn: Yes  
Mrs. Jodi Schaffer: Yes  
Mr. Steve Slater: Yes  
Ms. Jackie Thomas: Yes  
Yes: 11; No: 0

**IV. Executive Session – No**

**V. Pledge to the Flag and Meditation – Michael Caraccio, Principal of Hixson Middle School**

**VI. Foundation Updates**

VI.A. Kids First Coupon Book Campaign Updates – Lebron Sterchi

**VII. Exemplars of Excellence**

VII.A. Recognition and installation of Non-Voting Student Board Members  
Starr Saied, Ooltewah High School  
Ryan Jenkins, Soddy Daisy High School

**VIII. Board Member Disclaimer Statement - I declare that I have a [spouse, parent, grandparent, child, sibling, aunt, uncle, nephew, niece, relation-in-law or member of my household] who works for the school system and that the Board's vote on [budget, policies, etc.] may have an effect on my relative's employment. Even so, I hereby certify that I will cast my vote in the best interest of the school system.**

Board Member Karitsa Jones recited the Board Disclaimer Statement.

**IX. \*\*Approval of the Consent Agenda**

**Passed:** Motion to approve the Consent Agenda

Passed with a Motion by Mrs. Jill Black and a Second by Mrs. Felice Hadden.

Mr. Joe Smith:	Yes
Mrs. Jill Black:	Yes
Mr. Ben Connor:	Yes
Mr. Ben Daugherty:	Yes
Mr. Larry Grohn:	Yes
Mrs. Felice Hadden:	Yes
Mrs. Karitsa Jones:	Yes
Mr. Gary Kuehn:	Yes
Mrs. Jodi Schaffer:	Yes
Mr. Steve Slater:	Yes
Ms. Jackie Thomas:	No

Yes: 10; No: 1

IX.A. Approval of the Minutes of the August 2025 Regular Session

IX.B. Deputy Superintendent – Dr. Sonia Stewart

IX.B.1 Field Trips

IX.B.1.a. Dr. Elaine Harper – Community Superintendent Harrison Bay

IX.B.1.b. Dr. Lee Ziegler – Community Superintendent North River

IX.B.1.c. Dr. Shane Harwood – Community Superintendent, Rock Point

IX.B.1.d. Dr. Marques Stewart – Community Superintendent Missionary Ridge

IX.C. Chief Financial Officer – Mary Ellen Heuton, CPA

IX.C.1. Bids/Contracts

IX.C.1.A. Request for Approval of Engineering Design Services

IX.C.1.B. Award BID 26-19 Central High School HVAC Upgrades

IX.C.2. Financial Reports

IX.C.3. Budget Amendments

IX.C.3.a. Federal Grants, State Grants, and Self-Funded Programs

IX.C.3.b. Request Approval of FY26 Budget Amendment – General Purpose for Matching Bonus

**X. Administrative Business Matters**

X.A. Chief Talent Officer – Dr. Zac Brown

**X.A.1. \*\*Teachers Eligible for Tenure**

**Passed:** Motion to Approve Teachers Eligible for Tenure

Motion by Mr. Ben Daugherty and a Second by Mr. Gary Kuehn.

Mr. Joe Smith: Yes  
Mrs. Jill Black: Yes  
Mr. Ben Connor: Yes  
Mr. Ben Daugherty: Yes  
Mr. Larry Grohn: Yes  
Mrs. Felice Hadden: Yes  
Mrs. Karitsa Jones: Yes  
Mr. Gary Kuehn: Yes  
Mrs. Jodi Schaffer: Yes  
Mr. Steve Slater: Yes  
Ms. Jackie Thomas: Yes  
Yes: 11; No: 0

**X.A.2. \*\*2026 Benefit Premiums**

**Passed:** Motion to Approve 2026 Benefit for Tenure

Motion by Mr. Gary Kuehn and a Second by Mr. Ben Daugherty.

Mr. Joe Smith: Yes  
Mrs. Jill Black: Yes  
Mr. Ben Connor: Yes  
Mr. Ben Daugherty: Yes  
Mr. Larry Grohn: Yes  
Mrs. Felice Hadden: Yes  
Mrs. Karitsa Jones: Yes  
Mr. Gary Kuehn: Yes  
Mrs. Jodi Schaffer: Yes  
Mr. Steve Slater: Yes  
Ms. Jackie Thomas: Yes  
Yes: 11; No: 0

**X.A.3. \*\*MOU Updates for 2026**

**Passed:** Motion to Approve MOU Updates for 2026

Motion by Mr. Gary Kuehn and a Second by Mr. Ben Daugherty.

Mr. Joe Smith: Yes  
Mrs. Jill Black: Yes  
Mr. Ben Connor: Yes  
Mr. Ben Daugherty: Yes  
Mr. Larry Grohn: Yes

Mrs. Felice Hadden: Yes  
Mrs. Karitsa Jones: Yes  
Mr. Gary Kuehn: Yes  
Mrs. Jodi Schaffer: Yes  
Mr. Steve Slater: Yes  
Ms. Jackie Thomas: Yes  
Yes: 11; No: 0

**X.A.4. \*\*Salary Scale – Masters/Step 0 Correction**

**Passed:** Motion to Approve Salary Scale – Masters/Step 0 Correction

Motion by Mrs. Jill Black and a Second by Mr. Gary Kuehn.

Mr. Joe Smith: Yes  
Mrs. Jill Black: Yes  
Mr. Ben Connor: Yes  
Mr. Ben Daugherty: Yes  
Mr. Larry Grohn: Yes  
Mrs. Felice Hadden: Yes  
Mrs. Karitsa Jones: Yes  
Mr. Gary Kuehn: Yes  
Mrs. Jodi Schaffer: Yes  
Mr. Steve Slater: Yes  
Ms. Jackie Thomas: Yes  
Yes: 11; No: 0

X.B. Chief Operations Officer – Dr. Robert Sharpe

**X.B.1. \*\*Bond Fund Capital Projects and FY26 Budget Amendment – Self-Funded**

**Passed:** Motion to Approve Bond Fund Capital Projects and FY26 Budget Amendment – Self-Funded

Motion by Mrs. Felice Hadden and a Second by Mr. Gary Kuehn.

Mr. Joe Smith: Yes  
Mrs. Jill Black: Yes  
Mr. Ben Connor: Yes  
Mr. Ben Daugherty: Yes  
Mr. Larry Grohn: Yes  
Mrs. Felice Hadden: Yes  
Mrs. Karitsa Jones: Yes  
Mr. Gary Kuehn: Yes  
Mrs. Jodi Schaffer: Yes  
Mr. Steve Slater: Yes

Ms. Jackie Thomas: Yes  
Yes: 11; No: 0

Withdrawn: Motion to Amend to Pull Reference to CSAS stadium/turf from list for further discussion.

Motion by Mrs. Jodi Schaffer and a Second by Mr. Larry Grohn.

**X.B.2. \*\*Arch Study – Westview, Apison, East Brainerd Annex (Cigna)**

**Passed:** Motion to Approve Arch Study – Westview, Apison, East Brainerd Annex (Cigna)

Passed with a Motion by Mrs. Jodi Schaffer and a Second by Mr. Ben Daugherty.

Mr. Joe Smith: Yes  
Mrs. Jill Black: Yes  
Mr. Ben Connor: Yes  
Mr. Ben Daugherty: Yes  
Mr. Larry Grohn: Yes  
Mrs. Felice Hadden: Yes  
Mrs. Karitsa Jones: Yes  
Mr. Gary Kuehn: Yes  
Mrs. Jodi Schaffer: Yes  
Mr. Steve Slater: Yes  
Ms. Jackie Thomas: Yes  
Yes: 11; No: 0

**X.B.3. \*\*CCA Property Encroachment**

**Passed:** Motion to Approve CCA Property Encroachment

Passed with a Motion by Mr. Gary Kuehn and Second by Mrs. Jill Black.

Mr. Joe Smith: Yes  
Mrs. Jill Black: Yes  
Mr. Ben Connor: Yes  
Mr. Ben Daugherty: Yes  
Mr. Larry Grohn: Yes  
Mrs. Felice Hadden: Yes  
Mrs. Karitsa Jones: Yes  
Mr. Gary Kuehn: Yes  
Mrs. Jodi Schaffer: Yes  
Mr. Steve Slater: Yes  
Ms. Jackie Thomas: Yes  
Yes: 11; No: 0

**XI. Board Matters**

**XI.A. Ben Connor – District 6**

**\*\*MOU with Centerstone Mental Health Center, Inc. with the language addition:**

- **All Centerstone employees will be background checked through Hamilton County Schools or Hamilton County Schools-approved methods.**
- **This MOU will be effective immediately, reinstating services and continuing until such time as an RFQ can be fulfilled concerning student mental health services.**

**Tabled:** Motion to Approve MOU with Centerstone Mental Health Center with the language addition

Motion to Approve by Mrs. Karitsa Jones and a Second by Mrs. Jill Black.

Tabled with a Motion by Mrs. Jodi Schaffer and a Second by Mr. Larry Grohn.

Mr. Joe Smith:	Yes
Mrs. Jill Black:	No
Mr. Ben Connor:	No
Mr. Ben Daugherty:	Yes
Mr. Larry Grohn:	Yes
Mrs. Felice Hadden:	Yes
Mrs. Karitsa Jones:	No
Mr. Gary Kuehn	Yes
Mrs. Jodi Schaffer:	Yes
Mr. Steve Slater:	Yes
Ms. Jackie Thomas:	No
Yes: 7; No: 4	

**XI.B. Felice Hadden – District 10**

Staffing issues including Exceptional Education  
Budget

**XII. Information Only**

XII.A. Legal Services Report

**XIII. Events/Announcements**

Monday, September 29, 2025 at 4:30 pm Policy Committee Meeting

Monday, October 6, 2025 Executive Session

Thursday, October 9, 2025 Board Meeting

**XIV. Adjourn**

The meeting was adjourned at 7:47 p.m.

\_\_\_\_\_  
Chairperson

\_\_\_\_\_  
Date

\_\_\_\_\_  
Superintendent

\_\_\_\_\_  
Date

**To:** Hamilton County Board of Education  
Dr. Justin Robertson, Superintendent

**From:** Dr. Elaine Harper, Community Superintendent, HBLC

**Date:** October 9, 2025

**Subject:** Harrison Bay Overnight Field Trip Approval

**Board Agenda Category:**

- Consent Agenda
  - Action Item
  - Reports and Information
- 

1. **Ooltewah High**-Eighteen students from the JROTC will travel to compete in the National Raider Championship in Ft. Knox, Kentucky. They will depart October 23, 2025, and return October 26, 2025.
2. **East Hamilton High**-Twenty-eight students from the JROTC will travel to compete in the National Raider Championship in Ft. Knox, Kentucky. They will depart October 23, 2025, and return October 26, 2025.
3. **Ooltewah High**-Eighteen students from the Cheer Team will travel to Knoxville, Tennessee, to compete in the Cheer-Dance State Competition at the Knoxville Convention Center. They will depart November 6, 2025 and return November 7, 2025.
4. **Central High**-Twenty students from the Volleyball Team will celebrate the season with an awards ceremony staying overnight on campus in the CHS Gymnasium on November 7, 2025, they will depart campus on November 8, 2025.
5. **Apison Elementary**-Thirty-three students from the Beta Club will travel to the Opryland Hotel and Convention Center in Nashville, Tennessee, to participate in the State Beta Convention. They will depart November 22, 2025 and return November 23, 2025.
6. **Ooltewah High**-Five students from the Wrestling Team will travel to compete in the State Qualifiers at the Williamson County Agricultural Center in Franklin, Tennessee. They will depart February 19, 2026, and return February 21, 2026.
7. **East Hamilton Middle**-Seventy-five 8th grade students will travel to Washington, D.C., for an immersive experience in government and history. They will depart May 13, 2026, and return May 17, 2026.

**Opportunity 2030 Commitment Connection**

- Every Student Learns
- Every Student Belongs
- Every School Equipped
- Every Employee Valued
- Every Community Served



HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight Day/Overnight (Must go to Board for Approval)

Today's Date: 08/15/25 11:00 AM

Learning Community FRI/CTE Exceptional Ed PreK

School East Hamilton High Grade/Group/Team 9-12/JROTC/Raiders-Male Team
Departure Date/Time 10/23/25 12:00pm Return Date/Time 10/26/25 7:30pm
Event/Venue Raider Nationals Address 1234 Bullion Blvd, FT Knox, KY 40121

Instructional value Cadets will compete against Raider teams from around the world. They will visit military equipment displays as well as Senior ROTC programs and military academies.

Evaluation By professional Soldiers

Fee Requested \$ 0.00 How Acquired? N/A

Total # of Students 28 Total # of Staff 2 Total # of Chaperones 0 Nurse Required: No

Number of subs needed 0 Funding source for subs

Total # of Students with 504 Plan 0 Modifications Needed

Total # of Students with Disabilities 0 Modifications Needed

Transportation: The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

Other:
County School Bus Cost \$ Bus # Driver's Name
Handicap Accessible Bus Cost \$
Charter Bus (Board Approved) Rocky Top Tours Inc Cost \$ 7500
Cars List Driver(s) Cost \$

WRITTEN parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

List Chaperones:

Staff: Todd Tribby, Eric Redlin

Chaperones:
Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied? Yes

\*Overnight Field Trips

- \*Number of students not attending for economic reasons 0
\*Number of trips this group expects to take which will require funds 0
\*Estimated cost to parent support groups for this trip \$ 5000
\*Projects students have undertaken to secure funds NA
\*Co-ed trips require co-ed chaperones. Have you complied? Yes
\*Travel itinerary attached with name/address of accommodations Yes

Teacher Name: Todd Tribby Date Submitted: 08/15/25 11:00 AM

Secretary Name & Approval: STEPHANIE CRAMER Approved - Secretary 08/28/25

Principal's Name & Approval: BRENTLEY ELLER Approved - Principal 09/04/25

Director Admin Name & Approval:

Director Name & Approval:

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 09/04/25

LC Super Name & Approval: ELAINE HARPER Approved - LC Superintendent 09/04/25

HAMILTON COUNTY SCHOOLS  
Request for Field Trip Approval

Overnight Day/Overnight (Must go to Board for Approval)

Today's Date: 09/12/25 1:34 PM



Learning Community



FRI/CTE



Exceptional Ed



PreK

School Ooltewah High

Grade/Group/Team 9-12 Cheerleaders

Departure Date/Time 11/06/25 9:00am

Return Date/Time 11/07/25 10:00pm

Event/Venue Cheer-Dance State Competition/Knoxville Convention Center, Hilton

Address 701 Henley Street, Knoxville TN 37902, 5335 Central Ave

Instructional value Compete against other TN cheer teams

Evaluation Awards will be given

Fee Requested \$ 0.00 How Acquired? Booster Club-Restricted

Total # of Students 18 Total # of Staff 3 Total # of Chaperones 0 Nurse Required: No

Number of subs needed 0 Funding source for subs \_\_\_\_\_

• Total # of Students with 504 Plan 0 Modifications Needed \_\_\_\_\_

• Total # of Students with Disabilities 0 Modifications Needed \_\_\_\_\_

**Transportation:** The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

Other: \_\_\_\_\_

County School Bus Cost \$ \_\_\_\_\_ Bus # \_\_\_\_\_ Driver's Name \_\_\_\_\_

Handicap Accessible Bus Cost \$ \_\_\_\_\_

Charter Bus (Board Approved) \_\_\_\_\_ Cost \$ \_\_\_\_\_

Cars List Driver(s) Parents are providing transportation for their child Cost \$ 0

WRITTEN parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

**List Chaperones:**

Staff: Wendy Smith, Chandler Brown, Ginger Patterson

Chaperones: \_\_\_\_\_

Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied?  Yes

**\*Overnight Field Trips**

\*Number of students not attending for economic reasons 0

\*Number of trips this group expects to take which will require funds 0

\*Estimated cost to parent support groups for this trip \$ 0

\*Projects students have undertaken to secure funds Fundraising

\*Co-ed trips require co-ed chaperones. Have you complied?  Yes

\*Travel itinerary attached with name/address of accommodations  Yes

Teacher Name: Wendy Smith Date Submitted: 09/12/25 1:34 PM

Secretary Name & Approval: TINA LEE Approved - Secretary 09/15/25

Principal's Name & Approval: DONALD MULLINS Approved - Principal 09/15/25

Director Admin Name & Approval: \_\_\_\_\_

Director Name & Approval: \_\_\_\_\_

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 09/15/25

LC Super Name & Approval: ELAINE HARPER Approved - LC Superintendent 09/16/25

HAMILTON COUNTY SCHOOLS  
Request for Field Trip Approval

Overnight Day/Overnight (Must go to Board for Approval)

Today's Date: 07/22/25 11:19 AM



Learning Community



FRI/CTE



Exceptional Ed



PreK

School Central High

Grade/Group/Team Volleyball

Departure Date/Time 11/07/25 6 pm

Return Date/Time 11/08/25 10 am

Event/Venue CHS GYM

Address 5728 TN-58, Chattanooga, TN 37341

Instructional value End of the season awards, party, and gym clean up lock in. Team building and closing out the season in service.

Evaluation No evaluation of value other than leaving our players feeling celebrated and valued and our facilities well cared for an prepared for the next season of athletes to use.

Fee Requested \$ 0.00 How Acquired? School Athletic Fund

Total # of Students 20 Total # of Staff 2 Total # of Chaperones 1 Nurse Required: No

Number of subs needed 0 Funding source for subs \_\_\_\_\_

• Total # of Students with 504 Plan 0 Modifications Needed \_\_\_\_\_

• Total # of Students with Disabilities 0 Modifications Needed \_\_\_\_\_

**Transportation:** The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

Other: \_\_\_\_\_

County School Bus Cost \$ \_\_\_\_\_ Bus # \_\_\_\_\_ Driver's Name \_\_\_\_\_

Handicap Accessible Bus Cost \$ \_\_\_\_\_

Charter Bus (Board Approved) \_\_\_\_\_ Cost \$ \_\_\_\_\_

Cars List Driver(s) \_\_\_\_\_ Cost \$ \_\_\_\_\_

**WRITTEN** parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

**List Chaperones:**

Staff: Jenny Kanagy, Callie Capehart

Chaperones: Rebecia Tipton

Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied?  Yes

**\*Overnight Field Trips**

\*Number of students not attending for economic reasons 0

\*Number of trips this group expects to take which will require funds 0

\*Estimated cost to parent support groups for this trip \$ 0

\*Projects students have undertaken to secure funds fundraising efforts as a team and season gate fees

\*Co-ed trips require co-ed chaperones. Have you complied?  Yes

\*Travel itinerary attached with name/address of accommodations  Yes

Teacher Name: Jenny Kanagy Date Submitted: 07/22/25 11:19 AM

Secretary Name & Approval: KIMBERLY CRAWFORD Approved - Secretary 08/15/25

Principal's Name & Approval: LEANGELA ROGERS Approved - Principal 08/15/25

Director Admin Name & Approval: \_\_\_\_\_

Director Name & Approval: \_\_\_\_\_

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 09/09/25

LC Super Name & Approval: ELAINE HARPER Approved - LC Superintendent 09/09/25

# HAMILTON COUNTY SCHOOLS

## Request for Field Trip Approval

Overnight  Day/Overnight (Must go to Board for Approval)

Today's Date: 08/27/25 11:35 AM

Learning Community  
  FRI/CTE  
  Exceptional Ed  
  PreK

School Apison Elementary      Grade/Group/Team Beta Club  
 Departure Date/Time 11/22/25      dependent upon      Return Date/Time 11/23/25      dependent upon pa  
 Event/Venue Tennessee Elementary Beta Convention      Address 2800 Opryland Dr., Nashville, TN  
 Instructional value Students will join with other Beta members from across the state to compete in various categories.  
 Evaluation NA

Fee Requested \$ 243.00      How Acquired? Student/Parent  
 Total # of Students 33      Total # of Staff 4      Total # of Chaperones 0      Nurse Required: No  
 Number of subs needed 0      Funding source for subs \_\_\_\_\_  
 • Total # of Students with 504 Plan 1      Modifications Needed none  
 • Total # of Students with Disabilities 0      Modifications Needed \_\_\_\_\_

**Transportation:** The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

Other: \_\_\_\_\_  
 County School Bus      Cost \$ \_\_\_\_\_      Bus # \_\_\_\_\_      Driver's Name \_\_\_\_\_  
 Handicap Accessible Bus      Cost \$ \_\_\_\_\_  
 Charter Bus (Board Approved) \_\_\_\_\_      Cost \$ \_\_\_\_\_  
 Cars      List Driver(s) Each individual student will be driven and chaperoned by his/her own parent      Cost \$ 0

WRITTEN parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

**List Chaperones:**

Staff: James Sorrell, Amanda Thomason, Sharon DeVaney, Elizabeth Parker

Chaperones: \_\_\_\_\_  
 Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied?  Yes

**\*Overnight Field Trips**

- \*Number of students not attending for economic reasons 0
- \*Number of trips this group expects to take which will require funds 0
- \*Estimated cost to parent support groups for this trip \$ 0
- \*Projects students have undertaken to secure funds none
- \*Co-ed trips require co-ed chaperones. Have you complied?  Yes
- \*Travel itinerary attached with name/address of accommodations  Yes

Teacher Name: James Sorrell      Date Submitted: 08/27/25 11:35 AM

Secretary Name & Approval: AMY STONE      Approved - Secretary      09/03/25

Principal's Name & Approval: DANIELLE RUNGRUANG      Approved - Principal      09/23/25

Director Admin Name & Approval: \_\_\_\_\_

Director Name & Approval: \_\_\_\_\_

LC Super Admin Name & Approval: ALYSSA TEAL      Approved - LC Assistant      09/25/25

LC Super Name & Approval: ELAINE HARPER      Approved - LC Superintendent      09/25/25

HAMILTON COUNTY SCHOOLS

Request for Field Trip Approval

Overnight Day/Overnight (Must go to Board for Approval)

Today's Date: 09/23/25 8:09 AM

Learning Community

FRI/CTE

Exceptional Ed

PreK

School Ooltewah High

Grade/Group/Team HS/State Qualifiers/Wrestling

Departure Date/Time 02/19/26 9:30 AM

Return Date/Time 02/21/26 6:00 PM

Event/Venue Williamson County Agricultural Center

Address 4215 Long Ln, Franklin, TN 37064

Instructional value This is the culmination of their hard work, and the opportunity to showcase what they have learned.

Evaluation How did we wrestle? Did we get any hard wear?

Fee Requested \$ 0.00 How Acquired? N/A

Total # of Students 5 Total # of Staff 2 Total # of Chaperones 0 Nurse Required: No

Number of subs needed 2 Funding source for subs HCS Sub Acct

Total # of Students with 504 Plan 0 Modifications Needed

Total # of Students with Disabilities 0 Modifications Needed

Transportation: The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

Other:

County School Bus Cost \$ Bus # Driver's Name

Handicap Accessible Bus Cost \$

Charter Bus (Board Approved) Cost \$

Cars List Driver(s) Parents responsible for students outside of tournament play Cost \$0

WRITTEN parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

List Chaperones:

Staff: Luke Fisher, Colton Rogers

Chaperones:

Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied? Yes

\*Overnight Field Trips

\*Number of students not attending for economic reasons 0

\*Number of trips this group expects to take which will require funds 0

\*Estimated cost to parent support groups for this trip \$0

\*Projects students have undertaken to secure funds 0

\*Co-ed trips require co-ed chaperones. Have you complied? Yes

\*Travel itinerary attached with name/address of accommodations Yes

Teacher Name: Luke Fisher Date Submitted: 09/23/25 8:09 AM

Secretary Name & Approval: TINA LEE Approved - Secretary 09/24/25

Principal's Name & Approval: DONALD MULLINS Approved - Principal 09/24/25

Director Admin Name & Approval:

Director Name & Approval:

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 09/25/25

LC Super Name & Approval: ELAINE HARPER Approved - LC Superintendent 09/25/25

# HAMILTON COUNTY SCHOOLS

## Request for Field Trip Approval

Overnight Day/Overnight (Must go to Board for Approval)

Today's Date: 09/05/25 11:14 AM

Learning Community    
  FRI/CTE    
  Exceptional Ed    
  PreK

School East Hamilton Middle     Grade/Group/Team 8th Grade

Departure Date/Time 05/13/26 7:30 AM     Return Date/Time 05/17/26 11:00 PM

Event/Venue Washington DC Trip w/Worldstrides     Address 138 Spring St Herndon, VA 20170

Instructional value Students will engage in the history and government lessons they have experienced throughout the year.

Evaluation Students will share their experiences with the fellow students and loved ones. They will be given a structured situation to become more mature and ready for high school.

Fee Requested \$ 1597.00     How Acquired? Student/Parent

Total # of Students 75     Total # of Staff 7     Total # of Chaperones 0     Nurse Required: No

Number of subs needed 7     Funding source for subs HCS Sub Acct

• Total # of Students with 504 Plan 4     Modifications Needed None

• Total # of Students with Disabilities 0     Modifications Needed \_\_\_\_\_

**Transportation:** The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

Other: \_\_\_\_\_

County School Bus     Cost \$ \_\_\_\_\_     Bus # \_\_\_\_\_     Driver's Name \_\_\_\_\_

Handicap Accessible Bus     Cost \$ \_\_\_\_\_

Charter Bus (**Board Approved**) Rocky Top Tours Inc     Cost \$ 940

Cars     List Driver(s) \_\_\_\_\_     Cost \$ \_\_\_\_\_

**WRITTEN** parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

**List Chaperones:**

Staff: Mary Dennis, Burt Finley, James Clark, Auburn Collake, Mark Pace, Hannah Waters, Caleb Fish

Chaperones: \_\_\_\_\_

Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied?  Yes

**\*Overnight Field Trips**

\*Number of students not attending for economic reasons 0

\*Number of trips this group expects to take which will require funds 0

\*Estimated cost to parent support groups for this trip \$ 1597.00

\*Projects students have undertaken to secure funds None

\*Co-ed trips require co-ed chaperones. Have you complied?  Yes

\*Travel itinerary attached with name/address of accommodations  Yes

Teacher Name: Mary Dennis     Date Submitted: 09/05/25 11:14 AM

Secretary Name & Approval: RACHAEL SCHWENDIMAN     Approved - Secretary     09/05/25

Principal's Name & Approval: DR JUSTIN MCCULLEY     Approved - Principal     09/08/25

Director Admin Name & Approval: \_\_\_\_\_

Director Name & Approval: \_\_\_\_\_

LC Super Admin Name & Approval: ALYSSA TEAL     Approved - LC Assistant     09/08/25

LC Super Name & Approval: ELAINE HARPER     Approved - LC Superintendent     09/08/25

**To:** Hamilton County Board of Education  
Dr. Justin Robertson, Superintendent

**From:** Dr. Lee Ziegler, Community Superintendent, NRLC

**Date:** October 9, 2025

**Subject:** North River Overnight Field Trip Approval

**Board Agenda Category:**

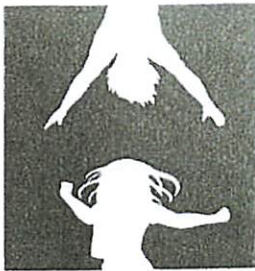
- Consent Agenda
  - Action Item
  - Reports and Information
- 

1. **\*Sale Creek Mid High**-Twenty students from the Volleyball Team traveled to compete in the Rocky top Classic Tournament at the Sevierville Convention Center in Sevierville, Tennessee. They departed September 12, 2025, and returned September 13, 2025.
2. **Soddy Daisy High**-Twenty-two students from the Forensics Team will travel to Science Hill High in Johnson City, Tennessee, to compete in a Forensics Tournament. They will depart November 21, 2025, and return November 22, 2025.
3. **Loftis Middle**-Fifty students from the Beta Club will travel to the Opryland Hotel and Convention Center in Nashville, Tennessee, to participate in the State Beta Club Convention. They will depart November 23, 2025, and return November 25, 2025.
4. **Soddy Daisy High**-Twenty-two students from the Forensics Team will travel to Dobbins-Bennett High in Kingsport, Tennessee, to compete in a Forensics Tournament. They will depart December 5, 2025, and return December 6, 2025.
5. **Soddy Daisy High**-Fourteen students from the Girls Basketball Team will travel to compete in the Smoky Mountain Christmas Classic at Rocky Top Sports World in Gatlinburg, Tennessee. They will depart December 18, 2025, and return December 20, 2025.
6. **Hixson High**-Twenty-two students from the Baseball Team will travel to compete in the Play for a Cure Tournament in Sevierville, Tennessee. They will depart December 18, 2025, and return December 20, 2025.

**Opportunity 2030 Commitment Connection**

- Every Student Learns
- Every Student Belongs
- Every School Equipped
- Every Employee Valued
- Every Community Served

\*These items were previously approved by Justin Robertson, Superintendent, and Joe Smith, Board Chairman.



Hamilton County Schools  
3074 Hickory Valley Road  
Chattanooga, Tennessee 37421

Request for Early Approval

MEMORANDUM

To: Executive Committee of the Board

School: Sale Creek

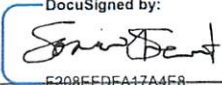
Date: 9/3/25 Trip Dates: 9/12 - 9/13/25

The attached request requires approval of the Board of Education. The reason this item was not submitted within the timeframe necessary for it to be placed on the agenda for a scheduled Board session is as follows:

Trip occurs before next scheduled session. It was not submitted earlier because there was a conflict with school activities that resulted in this change of schedule.

  
Principal Signature

9/3/25  
Date

DocuSigned by:  
  
F208EEDFA17A4E8...  
Deputy Superintendent

09/05/2025  
Date

**APPROVED:**

DS  
*Sm*

Signed by:  
  
4D76312655B6468...  
Superintendent Signature

09/08/2025  
Date

Signed by:  
  
A11004E245B040D...  
Board Chairman Signature

09/25/2025  
Date

HAMILTON COUNTY SCHOOLS

Request for Field Trip Approval

Overnight Day/Overnight (Must go to Board for Approval)

Today's Date: 09/03/25 8:20 AM

Learning Community

FRI/CTE

Exceptional Ed

PreK

School Sale Creek Mid High

Grade/Group/Team High School Volleyball Team

Departure Date/Time 09/12/25 9:00 AM

Return Date/Time 09/13/25 10:00 PM

Event/Venue Rocky Top Classic Tournament/Sevierville Convention Center, LaQuinta Inn

Address 202 Gists Creek Road, Sevierville, TN 37876, 2428 Winfield Dunn Pkwy

Instructional value Competition, skill development

Evaluation observation, tournament play

Fee Requested \$ 0.00 How Acquired? School Athletic Fund, Fundraiser(s)/Donation(s)

Total # of Students 20 Total # of Staff 3 Total # of Chaperones 0 Nurse Required: No

Number of subs needed 0 Funding source for subs

Total # of Students with 504 Plan 0 Modifications Needed

Total # of Students with Disabilities 0 Modifications Needed

Transportation: The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

Other:

County School Bus Cost \$ Bus # Driver's Name

Handicap Accessible Bus Cost \$

Charter Bus (Board Approved) Cost \$

Cars List Driver(s) Parents will transport their children to/from Cost \$ 0.00

WRITTEN parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

List Chaperones:

Staff: Erin Briner, Debbie Hill, Tina Aslinger

Chaperones: Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied? Yes

\*Overnight Field Trips

\*Number of students not attending for economic reasons 0

\*Number of trips this group expects to take which will require funds 3

\*Estimated cost to parent support groups for this trip \$ 0

\*Projects students have undertaken to secure funds yard sale, home matches, donations

\*Co-ed trips require co-ed chaperones. Have you complied? Yes

\*Travel itinerary attached with name/address of accommodations Yes

Teacher Name: Debbie Hill Date Submitted: 09/03/25 8:20 AM

Secretary Name & Approval: AMY WILLIAMS Approved - Secretary 09/04/25

Principal's Name & Approval: LEANN WELCH Approved - Principal 09/04/25

Director Admin Name & Approval:

Director Name & Approval:

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 09/04/25

LC Super Name & Approval: LEE ZIEGLER Approved - LC Superintendent 09/04/25

# HAMILTON COUNTY SCHOOLS

## Request for Field Trip Approval

Overnight Day/Overnight (Must go to Board for Approval)

Today's Date: 08/25/25 11:13 AM



Learning Community



FRI/CTE



Exceptional Ed



PreK

School Soddy Daisy High

Grade/Group/Team Forensics

Departure Date/Time 11/21/25 8:00AM

Return Date/Time 11/22/25 9:00PM

Event/Venue Science Hill High School (Forensics Tournament)

Address 1509 John Exum Pkwy, Johnson City, TN 37604

Instructional value Competition

Evaluation Performance

Fee Requested \$ 10.00 How Acquired? Student/Parent

Total # of Students 22 Total # of Staff 1 Total # of Chaperones 2 Nurse Required: No

Number of subs needed 1 Funding source for subs HCS Sub Account

• Total # of Students with 504 Plan 0 Modifications Needed \_\_\_\_\_

• Total # of Students with Disabilities 0 Modifications Needed \_\_\_\_\_

**Transportation:** The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

Other: \_\_\_\_\_

County School Bus Cost \$ \_\_\_\_\_ Bus # \_\_\_\_\_ Driver's Name \_\_\_\_\_

Handicap Accessible Bus Cost \$ \_\_\_\_\_

Charter Bus (Board Approved) \_\_\_\_\_ Cost \$ \_\_\_\_\_

Cars List Driver(s) JayEvan Montgomery, Heather Montgomery, Callie Downing (Staff), Parents responsible for student transportation Cost \$ 0.00

WRITTEN parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

**List Chaperones:**

Staff: Callie Downing

Chaperones: JayEvan Montgomery, Heather Montgomery

Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied?  Yes

**\*Overnight Field Trips**

\*Number of students not attending for economic reasons 0

\*Number of trips this group expects to take which will require funds 0

\*Estimated cost to parent support groups for this trip \$ 0

\*Projects students have undertaken to secure funds Tournament Hosting, Soddy Night Live, Carnival Booths

\*Co-ed trips require co-ed chaperones. Have you complied?  Yes

\*Travel itinerary attached with name/address of accommodations  Yes

Teacher Name: Callie Downing Date Submitted: 08/25/25 11:13 AM

Secretary Name & Approval: TINA BISHOP Approved - Secretary 09/03/25

Principal's Name & Approval: ANGELA CASS Approved - Principal 09/04/25

Director Admin Name & Approval: \_\_\_\_\_

Director Name & Approval: \_\_\_\_\_

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 09/08/25

LC Super Name & Approval: LEE ZIEGLER Approved - LC Superintendent 09/08/25

# HAMILTON COUNTY SCHOOLS

## Request for Field Trip Approval

Overnight  Day/Overnight (Must go to Board for Approval)

Today's Date: 09/09/25 8:41 AM

Learning Community  
  FRI/CTE  
  Exceptional Ed  
  PreK

School Loftis Middle

Grade/Group/Team Beta Club

Departure Date/Time 11/23/25 10:00 AM

Return Date/Time 11/25/25 3:30 PM

Event/Venue Beta Club State Convention/Opryland Hotel Convention Ctr

Address 2800 Opryland Dr., Nashville, TN 37214

Instructional value To provide opportunities for students to compete in various academic, talent, and service competitions, connect with other Beta members statewide, elect state-level student officers, and promote the four core values of Beta: achievement, character, leadership, and service.

Evaluation Competition/Placement - Reflection after trip

Fee Requested \$ 230.00 How Acquired? Student/Parent, Fundraiser(s)/Donation(s)

Total # of Students 50 Total # of Staff 4 Total # of Chaperones 0 Nurse Required: No

Number of subs needed 3 Funding source for subs HCS Sub Account

• Total # of Students with 504 Plan 0 Modifications Needed \_\_\_\_\_

• Total # of Students with Disabilities 0 Modifications Needed \_\_\_\_\_

**Transportation:** The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

- Other: \_\_\_\_\_
- County School Bus Cost \$ \_\_\_\_\_ Bus # \_\_\_\_\_ Driver's Name \_\_\_\_\_
- Handicap Accessible Bus Cost \$ \_\_\_\_\_
- Charter Bus (**Board Approved**) Nooga Shuttles Inc Cost \$ 3600
- Cars List Driver(s) \_\_\_\_\_ Cost \$ \_\_\_\_\_

**WRITTEN** parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

**List Chaperones:**

Staff: Tiffany York, Neal Hanley, Heather Kuffrey, Amy Barkley

Chaperones: \_\_\_\_\_  
 Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied?  Yes

**\*Overnight Field Trips**

- \*Number of students not attending for economic reasons 0
- \*Number of trips this group expects to take which will require funds 1
- \*Estimated cost to parent support groups for this trip \$ 0
- \*Projects students have undertaken to secure funds back-to-school dance
- \*Co-ed trips require co-ed chaperones. Have you complied?  Yes
- \*Travel itinerary attached with name/address of accommodations  Yes

Teacher Name: Tiffany York Date Submitted: 09/09/25 8:41 AM

Secretary Name & Approval: HEATHER KUFFREY Approved - Secretary 09/09/25

Principal's Name & Approval: BETHANIE REYNOLDS Approved - Principal 09/22/25

Director Admin Name & Approval: \_\_\_\_\_

Director Name & Approval: \_\_\_\_\_

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 09/25/25

LC Super Name & Approval: LEE ZIEGLER Approved - LC Superintendent 09/25/25

# HAMILTON COUNTY SCHOOLS

## Request for Field Trip Approval

Overnight  Day/Overnight (Must go to Board for Approval)

Today's Date: 08/25/25 12:49 PM

Learning Community

FRI/CTE

Exceptional Ed

PreK

School Soddy Daisy High

Grade/Group/Team Forensics

Departure Date/Time 12/05/25 8:00AM

Return Date/Time 12/06/25 9:00pm

Event/Venue Forensics Tournament/Dobyns-Bennett High School, Comfort Inn South

Address 1 Tribe Way, Kingsport, TN 37664, 4624 Fairlane Dr, Kingsport

Instructional value Competition

Evaluation Performance

Fee Requested \$ 10.00 How Acquired? Student/Parent

Total # of Students 22 Total # of Staff 1 Total # of Chaperones 2 Nurse Required: No

Number of subs needed 1 Funding source for subs HCS Sub Account

• Total # of Students with 504 Plan 0

Modifications Needed \_\_\_\_\_

• Total # of Students with Disabilities 0

Modifications Needed \_\_\_\_\_

**Transportation:** The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

- Other: \_\_\_\_\_
- County School Bus Cost \$ \_\_\_\_\_ Bus # \_\_\_\_\_ Driver's Name \_\_\_\_\_
- Handicap Accessible Bus Cost \$ \_\_\_\_\_
- Charter Bus (**Board Approved**) \_\_\_\_\_ Cost \$ \_\_\_\_\_
- Cars List Driver(s) JayEvan Montgomery, Heather Montgomery, Callie Downing (Staff), Parents responsible for student transportation Cost \$ 0.00

**WRITTEN** parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

**List Chaperones:**

Staff: Callie Downing

Chaperones: JayEvan Montgomery, Heather Montgomery

Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied?  Yes

**\*Overnight Field Trips**

- \*Number of students not attending for economic reasons 0
- \*Number of trips this group expects to take which will require funds 0
- \*Estimated cost to parent support groups for this trip \$ 0
- \*Projects students have undertaken to secure funds Tournament Hosting, Soddy Night Live, Carnival Booths
- \*Co-ed trips require co-ed chaperones. Have you complied?  Yes
- \*Travel itinerary attached with name/address of accommodations  Yes

Teacher Name: Callie Downing Date Submitted: 08/25/25 12:49 PM

Secretary Name & Approval: TINA BISHOP Approved - Secretary 09/03/25

Principal's Name & Approval: ANGELA CASS Approved - Principal 09/04/25

Director Admin Name & Approval: \_\_\_\_\_

Director Name & Approval: \_\_\_\_\_

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 09/08/25

LC Super Name & Approval: LEE ZIEGLER Approved - LC Superintendent 09/08/25

# HAMILTON COUNTY SCHOOLS

## Request for Field Trip Approval

Overnight Day/Overnight (Must go to Board for Approval) Today's Date: 08/26/25 9:45 AM

Learning Community   
  FRI/CTE   
  Exceptional Ed   
  PreK

School Soddy Daisy High Grade/Group/Team Soddy Daisy Girls Basketball Team

Departure Date/Time 12/18/25 8:00 am Return Date/Time 12/20/25 8:00 pm

Event/Venue Smoky Mountain Christmas Classic at Rocky Top Sports World Address 1970 Sports World Blvd Gatlinburg, TN 37738

Instructional value To help challenge us to compete at a high level. Grow as a team.

Evaluation Win/Loss

Fee Requested \$ 0.00 How Acquired? School Funds, Booster Club-Restricted

Total # of Students 14 Total # of Staff 2 Total # of Chaperones 3 Nurse Required: No

Number of subs needed 0 Funding source for subs \_\_\_\_\_

• Total # of Students with 504 Plan 0 Modifications Needed \_\_\_\_\_

• Total # of Students with Disabilities 0 Modifications Needed \_\_\_\_\_

**Transportation:** The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

- Other: \_\_\_\_\_
- County School Bus Cost \$ \_\_\_\_\_ Bus # \_\_\_\_\_ Driver's Name \_\_\_\_\_
- Handicap Accessible Bus Cost \$ \_\_\_\_\_
- Charter Bus (Board Approved) \_\_\_\_\_ Cost \$ \_\_\_\_\_
- Cars List Driver(s) Katie Wright, Mickey Rector, Martha Ervin, Kelly Johnson, Melody Crawley Cost \$ 0.00

WRITTEN parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

**List Chaperones:**

Staff: Katie Wright, Mickey Rector

Chaperones: Martha Ervin, Kelly Johnson, Melody Crawley

Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied?  Yes

**\*Overnight Field Trips**

\*Number of students not attending for economic reasons 0

\*Number of trips this group expects to take which will require funds 0

\*Estimated cost to parent support groups for this trip \$ 0

\*Projects students have undertaken to secure funds Fundraising

\*Co-ed trips require co-ed chaperones. Have you complied?  Yes

\*Travel itinerary attached with name/address of accommodations  Yes

Teacher Name: Katie Wright Date Submitted: 08/26/25 9:45 AM

Secretary Name & Approval: TINA BISHOP Approved - Secretary 09/03/25

Principal's Name & Approval: ANGELA CASS Approved - Principal 09/17/25

Director Admin Name & Approval: \_\_\_\_\_

Director Name & Approval: \_\_\_\_\_

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 09/25/25

LC Super Name & Approval: LEE ZIEGLER Approved - LC Superintendent 09/25/25

# HAMILTON COUNTY SCHOOLS

## Request for Field Trip Approval

Overnight Day/Overnight (Must go to Board for Approval)

Today's Date: 09/10/25 8:31 AM

Learning Community    
  FRI/CTE    
  Exceptional Ed    
  PreK

School Hixson High     Grade/Group/Team Baseball Team

Departure Date/Time 03/16/26 1:00 p.m.     Return Date/Time 03/19/26 9:30 p.m.

Event/Venue Play for a Cure Tournament - Sevierville TN/Wilderness at the Smokies     Address 1424 Old Knoxville Hwy, Sevierville, TN 37876

Instructional value This trip will provide quality baseball competition against new teams, and allow for team bonding for improved team chemistry.

Evaluation There will be 5 games over the course of the 4 days.

Fee Requested \$ 0.00     How Acquired? N/A

Total # of Students 22     Total # of Staff 6     Total # of Chaperones 0     Nurse Required: No

Number of subs needed 0     Funding source for subs \_\_\_\_\_

• Total # of Students with 504 Plan 0     Modifications Needed \_\_\_\_\_

• Total # of Students with Disabilities 0     Modifications Needed \_\_\_\_\_

**Transportation:** The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

Other: \_\_\_\_\_  
 County School Bus    Cost \$ \_\_\_\_\_    Bus # \_\_\_\_\_    Driver's Name \_\_\_\_\_  
 Handicap Accessible Bus    Cost \$ \_\_\_\_\_  
 Charter Bus (**Board Approved**) \_\_\_\_\_    Cost \$ \_\_\_\_\_  
 Cars    List Driver(s) Michael Green, Josh Coppinger, Trae Walters, Matthew Oxford    Cost \$ 0

**WRITTEN** parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

**List Chaperones:**

Staff: Michael Green, Josh Coppinger, Trae Walters, LeAngela Rogers, Melissa Rogers, Crystal Birch

Chaperones: \_\_\_\_\_  
 Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied?  Yes

**\*Overnight Field Trips**

- \*Number of students not attending for economic reasons 0
- \*Number of trips this group expects to take which will require funds 1
- \*Estimated cost to parent support groups for this trip \$ 100
- \*Projects students have undertaken to secure funds 0
- \*Co-ed trips require co-ed chaperones. Have you complied?  Yes
- \*Travel itinerary attached with name/address of accommodations  Yes

Teacher Name: Michael Green     Date Submitted: 09/10/25 8:31 AM

Secretary Name & Approval: TRACY MILLER     Approved - Secretary     09/11/25

Principal's Name & Approval: LUNT\_DANIEL@HCDE.ORG     Approved - Principal     09/11/25

Director Admin Name & Approval: \_\_\_\_\_

Director Name & Approval: \_\_\_\_\_

LC Super Admin Name & Approval: ALYSSA TEAL     Approved - LC Assistant     09/11/25

LC Super Name & Approval: LEE ZIEGLER     Approved - LC Superintendent     09/11/25

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**To:** Hamilton County Board of Education  
Dr. Justin Robertson, Superintendent

**From:** Dr. Shane Harwood, Community Superintendent  
Rock Point Learning Community

**Date:** **October 9, 2025**

**Subject:** Field Trips

**Board Agenda Category:**

- Consent Agenda
- Action Item
- Reports and Information

- 
- #1. Signal Mountain Middle/High School** - Two 11th grade Special Olympics Unified Leadership students will travel to Franklin, Tennessee November 7-9, 2025 to represent Tennessee in the leadership category of the 2026 USA Special Olympic Games.
- #2. Red Bank High School** - Twenty 6th-8th grade Beta Club students will travel to Nashville, Tennessee November 23-25, 2025 to compete in the Junior Beta State Convention.
- #3. Red Bank High School** - Twelve 9th-12th grade Boys Basketball students will travel to Johnson City, Tennessee January 16-18, 2026 to participate in the Tri-Cities Classic.
- #4. Center for Creative Arts School** - Thirty 9th-12th grade Instrumental students will travel to Gatlinburg, Tennessee February 5-7, 2026 to participate in the ETSBOA Senior Clinic.
- #5. Signal Mountain Middle/High School** - Two 7th-8th grade Band students will travel to Disney World Orlando in Lake Buena Vista, Florida March 4-8, 2026 to participate in the Disney Soundtrack Workshop.
- #6. Signal Mountain Middle/High School** - Eighty 9th-12th grade Band students will travel to Universal World in Orlando, Florida March 25-29, 2026 to participate in band workshops and hands-on instruction from professional clinicians.

**Opportunity 2030 Commitment Connection**

- Every Student Learns
- Every Student Belongs
- Every School Equipped
- Every Employee Valued
- Every Community Served

## HAMILTON COUNTY SCHOOLS Request for Field Trip Approval

Overnight Day/Overnight (Must go to Board for Approval)

Today's Date: 08/20/25 1:15 PM

Learning Community   
  FRI/CTE   
  Exceptional Ed   
  PreK

School Sign Mountain Middle/High

Grade/Group/Team 11/Special Olympics Unified Leadership

Departure Date/Time 11/07/25 4pm

Return Date/Time 11/09/25 3pm

Event/Venue Drury Inn and Suites/special olympics

Address 1874 West McEwen Drive, Franklin, TN 37067

Instructional value Signal Mountain Unified Special Olympics was chosen to represent TN in the leadership category of the 2026 USA Special Olympics Games. We were given three spots (teacher, gen ed student, ex ed student). This is the training weekend that is for that opportunity. The main objective is to gain leadership skills.

Evaluation Teacher Observation

Fee Requested \$ 0 How Acquired? N/A

Total # of Students 2 Total # of Staff 1 Total # of Chaperones 0 Nurse Required: No

Number of subs needed 0 Funding source for subs \_\_\_\_\_

• Total # of Students with 504 Plan 0 Modifications Needed \_\_\_\_\_

• Total # of Students with Disabilities 1 Modifications Needed n/a

**Transportation:** The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

Other: \_\_\_\_\_  
 County School Bus Cost \$ \_\_\_\_\_ Bus # \_\_\_\_\_ Driver's Name \_\_\_\_\_  
 Handicap Accessible Bus Cost \$ \_\_\_\_\_  
 Charter Bus (**Board Approved**) \_\_\_\_\_ Cost \$ \_\_\_\_\_  
 Cars List Driver(s) parents responsible for transportation of their student Cost \$ 0

**WRITTEN** parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

**List Chaperones:**

Staff: Anna Shepard

Chaperones: \_\_\_\_\_

Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied?  Yes

**\*Overnight Field Trips**

\*Number of students not attending for economic reasons 0

\*Number of trips this group expects to take which will require funds 0

\*Estimated cost to parent support groups for this trip \$ 0

\*Projects students have undertaken to secure funds participated in Unified Special Olympics events

\*Co-ed trips require co-ed chaperones. Have you complied?  Yes

\*Travel itinerary attached with name/address of accommodations  Yes

Teacher Name: Anna Shepard Date Submitted: 08/20/25 1:15 PM

Secretary Name & Approval: DEBBIE PRICE Approved - Secretary 08/21/25

Principal's Name & Approval: MICHAEL CARSON Approved - Principal 09/02/25

Director Admin Name & Approval: BECKY BELL Approved - Director Admin 09/05/25

Director Name & Approval: MICHELLE EARGLE Approved - Director 09/05/25

LC Super Admin Name & Approval: PAMELA KILGORE Approved - LC Assistant 09/25/25

LC Super Name & Approval: DAVID HARWOOD Approved - LC Superintendent 09/25/25

## HAMILTON COUNTY SCHOOLS Request for Field Trip Approval

Overnight Day/Overnight (Must go to Board for Approval) Today's Date: 09/10/25 7:51 AM

Learning Community     FRI/CTE     Exceptional Ed     PreK

School Red Bank Middle Grade/Group/Team 6,7,8/Beta Club

Departure Date/Time 11/23/25 8:00am Return Date/Time 11/25/25 3:00pm

Event/Venue Junior Beta State Convention/Gaylord Opryland Resort and Conference Center Address 2800 Opryland Dr, Nashville, TN 37214

Instructional value Students will compete and demonstrate academic, collaboration, and leadership skills.

Evaluation Students will be given feedback by the competition judges for the event.

Fee Requested \$ 360.00 How Acquired? Student/Parent

Total # of Students 20 Total # of Staff 2 Total # of Chaperones 0 Nurse Required: No

Number of subs needed 2 Funding source for subs HCS Sub Account

• Total # of Students with 504 Plan 0 Modifications Needed \_\_\_\_\_

• Total # of Students with Disabilities 0 Modifications Needed \_\_\_\_\_

**Transportation:** The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

- Other: \_\_\_\_\_
- County School Bus Cost \$ \_\_\_\_\_ Bus # \_\_\_\_\_ Driver's Name \_\_\_\_\_
- Handicap Accessible Bus Cost \$ \_\_\_\_\_
- Charter Bus (**Board Approved**) \_\_\_\_\_ Cost \$ \_\_\_\_\_
- Cars List Driver(s) Parents will be responsible transporting their own student, room accommodation and only out of direct supervision outside of the venue. Cost \$ 0

**WRITTEN** parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

**List Chaperones:**

Staff: Raechel Councill and Emma Martin

Chaperones: \_\_\_\_\_

Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied?  Yes

**\*Overnight Field Trips**

\*Number of students not attending for economic reasons 0

\*Number of trips this group expects to take which will require funds 0

\*Estimated cost to parent support groups for this trip \$ 0

\*Projects students have undertaken to secure funds 0

\*Co-ed trips require co-ed chaperones. Have you complied?  Yes

\*Travel itinerary attached with name/address of accommodations  Yes

Teacher Name: Raechel Councill Date Submitted: 09/10/25 7:51 AM

Secretary Name & Approval: BRYAN FALLS Approved - Secretary 09/10/25

Principal's Name & Approval: GINGER FRADY Approved - Principal 09/14/25

Director Admin Name & Approval: \_\_\_\_\_

Director Name & Approval: \_\_\_\_\_

LC Super Admin Name & Approval: PAMELA KILGORE Approved - LC Assistant 09/17/25

LC Super Name & Approval: DAVID HARWOOD Approved - LC Superintendent 09/17/25

## HAMILTON COUNTY SCHOOLS Request for Field Trip Approval

Overnight Day/Overnight (Must go to Board for Approval)

Today's Date: 09/05/25 9:00 AM

Learning Community     FRI/CTE     Exceptional Ed     PreK

School Red Bank High

Grade/Group/Team 9th-12th Boys Basketball

Departure Date/Time 01/16/26 8:00 AM

Return Date/Time 01/18/26 1:30 PM

Event/Venue Freedom Hall (ETSU), Tri-Cities Classic

Address 1276 Gilbreath Dr. Johnson City, TN. 37614

Instructional value To build chemistry, comradery, and to make memories amongst the players and coaches.

Evaluation Evaluation will be determined through observation.

Fee Requested \$ 0.00 How Acquired? N/A

Total # of Students 12 Total # of Staff 2 Total # of Chaperones 2 Nurse Required: No

Number of subs needed 1 Funding source for subs HCS Sub Account

• Total # of Students with 504 Plan 0

Modifications Needed \_\_\_\_\_

• Total # of Students with Disabilities 0

Modifications Needed \_\_\_\_\_

**Transportation:** The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

Other: \_\_\_\_\_

County School Bus Cost \$ \_\_\_\_\_ Bus # \_\_\_\_\_ Driver's Name \_\_\_\_\_

Handicap Accessible Bus Cost \$ \_\_\_\_\_

Charter Bus (**Board Approved**) \_\_\_\_\_ Cost \$ \_\_\_\_\_

Cars List Driver(s) Nick Fike, Antione Montgomery, Carlton Holloway, Reggie Upshaw Cost \$ 0

**WRITTEN** parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

**List Chaperones:**

Staff: Nick Fike, Reggie Upshaw

Chaperones: Antoine Montgomery, Carlton Holloway

Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied?  Yes

**\*Overnight Field Trips**

\*Number of students not attending for economic reasons 0

\*Number of trips this group expects to take which will require funds 0

\*Estimated cost to parent support groups for this trip \$ 0

\*Projects students have undertaken to secure funds 0

\*Co-ed trips require co-ed chaperones. Have you complied?  Yes

\*Travel itinerary attached with name/address of accommodations  Yes

Teacher Name: Nick Fike Date Submitted: 09/05/25 9:00 AM

Secretary Name & Approval: JOY ELLIS Approved - Secretary 09/05/25

Principal's Name & Approval: CHRISTOPHER TILLET Approved - Principal 09/05/25

Director Admin Name & Approval: \_\_\_\_\_

Director Name & Approval: \_\_\_\_\_

LC Super Admin Name & Approval: PAMELA KILGORE Approved - LC Assistant 09/25/25

LC Super Name & Approval: DAVID HARWOOD Approved - LC Superintendent 09/25/25

## HAMILTON COUNTY SCHOOLS Request for Field Trip Approval

Overnight Day/Overnight (Must go to Board for Approval)

Today's Date: 09/22/25 12:19 PM



Learning Community



FRI/CTE



Exceptional Ed



PreK

School Center for Creative Arts

Grade/Group/Team 9-12/Instrumental

Departure Date/Time 02/05/26 9:00AM

Return Date/Time 02/07/26 7:00PM

Event/Venue ETSBOA Senior Clinic/Courtyard Gatlinburg

Address 315 Airport Road, Gatlinburg, TN 37738

Instructional value ETSBOA Senior Clinic

Evaluation Performances at the end of the clinic

Fee Requested \$ 175.00 How Acquired? Student/Parent

Total # of Students 30 Total # of Staff 3 Total # of Chaperones 0 Nurse Required: No

Number of subs needed 2 Funding source for subs HCS Sub Account

• Total # of Students with 504 Plan 4 Modifications Needed No modifications needed

• Total # of Students with Disabilities 0 Modifications Needed \_\_\_\_\_

**Transportation:** The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

Other: \_\_\_\_\_

County School Bus Cost \$ \_\_\_\_\_ Bus # \_\_\_\_\_ Driver's Name \_\_\_\_\_

Handicap Accessible Bus Cost \$ \_\_\_\_\_

Charter Bus (**Board Approved**) Nooga Shuttles Inc Cost \$ 1,600.00

Cars List Driver(s) \_\_\_\_\_ Cost \$ \_\_\_\_\_

**WRITTEN** parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

**List Chaperones:**

Staff: Jessica Stansbury, Aaron Moore, Kenzie Hammond

Chaperones: \_\_\_\_\_

Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied?  Yes

**\*Overnight Field Trips**

\*Number of students not attending for economic reasons 0

\*Number of trips this group expects to take which will require funds 1

\*Estimated cost to parent support groups for this trip \$ 0

\*Projects students have undertaken to secure funds 0

\*Co-ed trips require co-ed chaperones. Have you complied?  Yes

\*Travel itinerary attached with name/address of accommodations  Yes

Teacher Name: Jessica Stansbury, Aaron Moore Date Submitted: 09/22/25 12:19 PM

Secretary Name & Approval: REGINA BRANTLEY Approved - Secretary 09/23/25

Principal's Name & Approval: JILL LEVINE Approved - Principal 09/23/25

Director Admin Name & Approval: \_\_\_\_\_

Director Name & Approval: \_\_\_\_\_

LC Super Admin Name & Approval: PAMELA KILGORE Approved - LC Assistant 09/25/25

LC Super Name & Approval: DAVID HARWOOD Approved - LC Superintendent 09/25/25

## HAMILTON COUNTY SCHOOLS Request for Field Trip Approval

Overnight Day/Overnight (Must go to Board for Approval) Today's Date: 09/10/25 3:10 PM

Learning Community     FRI/CTE     Exceptional Ed     PreK

School Sign Mountain Middle/High Grade/Group/Team 7-8/Band

Departure Date/Time 03/04/26 7am Return Date/Time 03/08/26 6:30pm

Event/Venue Disney World Orlando, Disney Soundtrack Session Workshop at EPCOT Address 551 Rainforest Rd., Lake Buena Vista, FL 32830

Instructional value Students will participate in the Disney Soundtrack Workshop

Evaluation Students will receive a audio copy of their recording from the workshop.

Fee Requested \$ 1198.00 How Acquired? Student/Parent

Total # of Students 80 Total # of Staff 2 Total # of Chaperones 2 Nurse Required: No

Number of subs needed 2 Funding source for subs HCS Sub Account

- Total # of Students with 504 Plan 0 Modifications Needed \_\_\_\_\_
- Total # of Students with Disabilities 0 Modifications Needed \_\_\_\_\_

**Transportation:** The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

- Other: \_\_\_\_\_
- County School Bus Cost \$ \_\_\_\_\_ Bus # \_\_\_\_\_ Driver's Name \_\_\_\_\_
- Handicap Accessible Bus Cost \$ \_\_\_\_\_
- Charter Bus (**Board Approved**) RockyTop Tours Inc Cost \$ 19000.00
- Cars List Driver(s) \_\_\_\_\_ Cost \$ \_\_\_\_\_

**WRITTEN** parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

**List Chaperones:**

Staff: Shelby Walker, Colton Brown

Chaperones: Tara Salsman, Samuel Snyder

Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied?  Yes

**\*Overnight Field Trips**

- \*Number of students not attending for economic reasons 0
- \*Number of trips this group expects to take which will require funds 0
- \*Estimated cost to parent support groups for this trip \$ 0
- \*Projects students have undertaken to secure funds 0
- \*Co-ed trips require co-ed chaperones. Have you complied?  Yes
- \*Travel itinerary attached with name/address of accommodations  Yes

Teacher Name: Shelby Walker Date Submitted: 09/10/25 3:10 PM

Secretary Name & Approval: DEBBIE PRICE Approved - Secretary 09/15/25

Principal's Name & Approval: MICHAEL CARSON Approved - Principal 09/18/25

Director Admin Name & Approval: \_\_\_\_\_

Director Name & Approval: \_\_\_\_\_

LC Super Admin Name & Approval: PAMELA KILGORE Approved - LC Assistant 09/25/25

LC Super Name & Approval: DAVID HARWOOD Approved - LC Superintendent 09/25/25

## HAMILTON COUNTY SCHOOLS Request for Field Trip Approval

Overnight Day/Overnight (Must go to Board for Approval)

Today's Date: 09/05/25 2:36 PM



Learning Community



FRI/CTE



Exceptional Ed



PreK

School Sign Mountain Middle/High

Grade/Group/Team 9-12/Band

Departure Date/Time 03/25/26 7am

Return Date/Time 03/29/26 6:30pm

Event/Venue Orlando/Universal World

Address 1000 Universal Studios Plz, Orlando, FL 32819

Instructional value Participation in a 3-day, 3-part, "Park to Park Workshop Plus" that includes a band workshop at Universal Studios (pending acceptance). Students receive hands-on instruction from professional clinicians. Workshop (they) emphasizes performance, ensemble skills, and connections between live performance and entertainment/music industries.

Evaluation Reflection Journal/Assignment:-Students write a short reflection on what they learned from the workshop, how it connects to class goals, and how they'll apply it in future rehearsals.

Fee Requested \$ 1100.00 How Acquired? Student/Parent

Total # of Students 80 Total # of Staff 3 Total # of Chaperones 3 Nurse Required: No

Number of subs needed 2 Funding source for subs HCS Sub Account

• Total # of Students with 504 Plan 0 Modifications Needed \_\_\_\_\_

• Total # of Students with Disabilities 0 Modifications Needed \_\_\_\_\_

**Transportation:** The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

Other: \_\_\_\_\_

County School Bus Cost \$ \_\_\_\_\_ Bus # \_\_\_\_\_ Driver's Name \_\_\_\_\_

Handicap Accessible Bus Cost \$ \_\_\_\_\_

Charter Bus (**Board Approved**) RockyTop Tours Inc Cost \$ \$20,000.00

Cars List Driver(s) \_\_\_\_\_ Cost \$ \_\_\_\_\_

**WRITTEN** parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

**List Chaperones:**

Staff: Trevor Hayes, Shelby Walker, Kristen Robertson

Chaperones: Tara Salsman, Kate Campbell, Gretchen Burgess,

Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied?  Yes

**\*Overnight Field Trips**

\*Number of students not attending for economic reasons 0

\*Number of trips this group expects to take which will require funds 0

\*Estimated cost to parent support groups for this trip \$ 0

\*Projects students have undertaken to secure funds 0

\*Co-ed trips require co-ed chaperones. Have you complied?  Yes

\*Travel itinerary attached with name/address of accommodations  Yes

Teacher Name: Shelby Walker Date Submitted: 09/05/25 2:36 PM

Secretary Name & Approval: DEBBIE PRICE Approved - Secretary 09/12/25

Principal's Name & Approval: MICHAEL CARSON Approved - Principal 09/22/25

Director Admin Name & Approval: \_\_\_\_\_

Director Name & Approval: \_\_\_\_\_

LC Super Admin Name & Approval: PAMELA KILGORE Approved - LC Assistant 09/25/25

LC Super Name & Approval: DAVID HARWOOD Approved - LC Superintendent 09/25/25

**To:** Hamilton County Board of Education  
Dr. Justin Robertson, Superintendent

**From:** Dr. Marques Stewart, Community Superintendent  
Missionary Ridge Learning Community

**Date:** **October 9, 2025**

**Subject:** Overnight Field Trips

**Board Agenda Category:**

- Consent Agenda
  - Action Item
  - Reports and Information
- 

- #1.** **East Ridge High School** - Twelve high school boys basketball team students will travel to Independence High School in Charlotte, North Carolina December 22-23, 2025 to participate in the Border Classic Basketball Tournament.
- #2.** **East Ridge High School** - Twelve high school boys basketball team students will travel to Happy Trails High School in Elizabeth Town, Tennessee December 29-31, 2025 to participate in the Happy Valley Christmas Basketball Tournament.

**Opportunity 2030 Commitment Connection**

- Every Student Learns
- Every Student Belongs
- Every School Equipped
- Every Employee Valued
- Every Community Served

## HAMILTON COUNTY SCHOOLS Request for Field Trip Approval

Overnight Day/Overnight (Must go to Board for Approval)

Today's Date: 09/15/25 1:39 PM



Learning Community



FRI/CTE



Exceptional Ed



PreK

School East Ridge High

Grade/Group/Team HS Boys Basketball Team

Departure Date/Time 12/22/25 8:00am

Return Date/Time 12/23/25 11:00PM

Event/Venue Border Classic

Address Independence High School 1967 Patriot Way Charlotte NC

Instructional value Playing in a basketball tournament teaches players much more than just how to win games—it helps them grow as athletes and individuals.

Evaluation Team Evaluation Game Results: Hoping that the team continues to

Fee Requested \$ 0 How Acquired? School Athletic Fund

Total # of Students 12 Total # of Staff 3 Total # of Chaperones 0 Nurse Required: No

Number of subs needed 0 Funding source for subs \_\_\_\_\_

• Total # of Students with 504 Plan 0 Modifications Needed \_\_\_\_\_

• Total # of Students with Disabilities 0 Modifications Needed \_\_\_\_\_

**Transportation:** The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

Other: \_\_\_\_\_

County School Bus Cost \$ \_\_\_\_\_ Bus # \_\_\_\_\_ Driver's Name \_\_\_\_\_

Handicap Accessible Bus Cost \$ \_\_\_\_\_

Charter Bus (**Board Approved**) \_\_\_\_\_ Cost \$ \_\_\_\_\_

Cars List Driver(s) Tre High, Jeulian High, and Alphonso Few Cost \$ 0

**WRITTEN** parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

**List Chaperones:**

Staff: Tre High, Jeulian High, and Alphonso Few

Chaperones: \_\_\_\_\_

Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied?  Yes

**\*Overnight Field Trips**

\*Number of students not attending for economic reasons 0

\*Number of trips this group expects to take which will require funds 0

\*Estimated cost to parent support groups for this trip \$ 0

\*Projects students have undertaken to secure funds 0

\*Co-ed trips require co-ed chaperones. Have you complied?  Yes

\*Travel itinerary attached with name/address of accommodations  Yes

Teacher Name: Tre High Date Submitted: 09/15/25 1:39 PM

Secretary Name & Approval: ANGELA CAMPO Approved - Secretary 09/15/25

Principal's Name & Approval: JUAN MORENO Approved - Principal 09/15/25

Director Admin Name & Approval: \_\_\_\_\_

Director Name & Approval: \_\_\_\_\_

LC Super Admin Name & Approval: PAMELA KILGORE Approved - LC Assistant 09/18/25

LC Super Name & Approval: DR. MARQUES STEWART Approved - LC Superintendent 09/25/25

## HAMILTON COUNTY SCHOOLS Request for Field Trip Approval

Overnight Day/Overnight (Must go to Board for Approval)

Today's Date: 09/15/25 1:37 PM

Learning Community     FRI/CTE     Exceptional Ed     PreK

School East Ridge High

Grade/Group/Team HS-Boys Basketball Team

Departure Date/Time 12/29/25 8:00am

Return Date/Time 12/31/25 11:00PM

Event/Venue Happy Valley Christmas Classic/Happy Valley HS

Address Happy Valley High School 121 Warpath Ln, Elizabethton, TN 37643

Instructional value Playing in a basketball tournament teaches players much more than just how to win games—it helps them grow as athletes and individuals.

Evaluation Team Evaluation

Fee Requested \$ 0 How Acquired? School Athletic Fund

Total # of Students 12 Total # of Staff 3 Total # of Chaperones 0 Nurse Required: No

Number of subs needed 0

Funding source for subs \_\_\_\_\_

• Total # of Students with 504 Plan 0

Modifications Needed \_\_\_\_\_

• Total # of Students with Disabilities 0

Modifications Needed \_\_\_\_\_

**Transportation:** The PRINCIPAL is responsible for verifying that ALL drivers are properly licensed and insured.

Other: \_\_\_\_\_  
 County School Bus Cost \$ \_\_\_\_\_ Bus # \_\_\_\_\_ Driver's Name \_\_\_\_\_  
 Handicap Accessible Bus Cost \$ \_\_\_\_\_  
 Charter Bus (**Board Approved**) \_\_\_\_\_ Cost \$ \_\_\_\_\_  
 Cars List Driver(s) Tre High, Jeulian High, and Alphonso Few Cost \$ 0

**WRITTEN** parental permission (and medical information, if overnight) for each student is required and must be received before the student is permitted to attend.

**List Chaperones:**

Staff: Tre High, Jeulian High, and Alphonso Few

Chaperones: \_\_\_\_\_

Background checks on non HCDE employee chaperones with unsupervised contact with students. Have you complied?  Yes

**\*Overnight Field Trips**

\*Number of students not attending for economic reasons 0

\*Number of trips this group expects to take which will require funds 0

\*Estimated cost to parent support groups for this trip \$ 0

\*Projects students have undertaken to secure funds 0

\*Co-ed trips require co-ed chaperones. Have you complied?  Yes

\*Travel itinerary attached with name/address of accommodations  Yes

Teacher Name: Tre High Date Submitted: 09/15/25 1:37 PM

Secretary Name & Approval: ANGELA CAMPO Approved - Secretary 09/15/25

Principal's Name & Approval: JUAN MORENO Approved - Principal 09/15/25

Director Admin Name & Approval: \_\_\_\_\_

Director Name & Approval: \_\_\_\_\_

LC Super Admin Name & Approval: PAMELA KILGORE Approved - LC Assistant 09/18/25

LC Super Name & Approval: DR. MARQUES STEWART Approved - LC Superintendent 09/18/25

**To:** Hamilton County Board of Education  
Dr. Justin Robertson, Superintendent

**From:** Mary Ellen Heuton, Chief Financial Officer

**Date:** October 9, 2025

**Subject:** Monthly Financial Report

**Board Agenda Category:**

- Consent Agenda
  - Action Item
  - Reports and Information
- 

Attached is the monthly financial report comparing budget to actual through August, 2025. The presentation of the monthly financial statement compares actual year-to-date expenditures to the original adopted budget and the year-to-date amended budget.

**Opportunity 2030 Commitment Connection**

- Every Student Learns
- Every Student Belongs
- Every School Equipped
- Every Employee Valued
- Every Community Served

**HAMILTON COUNTY SCHOOLS  
REVENUE/EXPENSES VS BUDGET  
PERIOD ENDED  
August 2025**

REVENUES	General Purpose			Federal Programs			Self-Funded Programs			School Nutrition			Grand Totals		
	Adopted Budget	Revised Budget	YTD Actual	Adopted Budget	Revised Budget	YTD Actual	Adopted Budget	Revised Budget	YTD Actual	Adopted Budget	Revised Budget	YTD Actual	Adopted Budget	Revised Budget	YTD Actual
LOCAL TAXES	276,530,590	276,530,590	6,280,220	-	-	-	-	-	-	-	-	-	276,530,590	276,530,590	6,280,220
LICENSES AND PERMITS	13,000	13,000	841	-	-	-	-	-	-	-	-	-	13,000	13,000	841
CHARGES FOR CURRENT SERVICES	424,000	424,000	23,540	-	-	-	5,203,293	5,213,293	711,147	3,718,711	3,718,711	422,488	9,346,004	9,356,004	1,157,176
OTHER LOCAL REVENUES	4,396,679	4,396,679	454,188	-	-	-	5,152,154	5,840,344	348,782	694,774	694,774	106,036	10,243,607	10,931,797	909,006
STATE OF TENNESSEE	294,513,153	302,991,315	35,514,005	-	-	-	-	-	-	-	-	-	294,513,153	302,991,315	35,514,005
OTHER STATE REVENUES	13,632,985	13,632,985	169,010	-	-	-	-	-	-	210,000	210,000	-	13,842,985	13,842,985	169,010
FEDERAL GOVERNMENT	2,154,770	2,154,770	121,898	36,439,010	36,735,645	453,847	-	-	-	25,726,184	25,726,184	-	64,319,964	64,616,599	575,745
OTHER SOURCES	927,480	927,480	-	-	-	-	-	-	-	-	-	200	927,480	927,480	200
RESERVES/FUND BALANCE *	-	101,412	-	-	-	-	21,623,109	31,074,754	1,015,349	-	-	-	21,623,109	31,176,166	1,015,349
PY ENCUMBRANCE BUDGET	869,897	869,897	-	-	-	-	-	-	-	-	-	-	869,897	869,897	-
<b>TOTAL REVENUES</b>	<b>593,462,554</b>	<b>602,042,128</b>	<b>42,563,702</b>	<b>36,439,010</b>	<b>36,735,645</b>	<b>453,847</b>	<b>31,978,556</b>	<b>42,128,391</b>	<b>2,075,279</b>	<b>30,349,669</b>	<b>30,349,669</b>	<b>528,725</b>	<b>692,229,789</b>	<b>711,255,833</b>	<b>45,621,552</b>
<b>EXPENDITURES</b>															
REGULAR INSTRUCTION PROGRAM	71100	245,509,367	248,237,201	26,985,065	5,406,819	7,352,648	452,318	4,136,987	4,393,858	267,659	-	-	255,053,173	259,983,707	27,705,043
SPECIAL EDUCATION INSTR PROG	71200	43,682,602	45,773,867	3,859,022	8,943,157	9,117,306	555,294	1,134,693	1,134,693	1,742	-	-	53,760,452	56,025,866	4,416,059
VOCATIONAL ED INSTR PROG	71300	20,702,161	20,540,861	2,200,486	680,658	752,065	121,021	75,358	110,688	21,888	-	-	21,458,177	21,403,614	2,343,396
STUDENT BODY EDUCATIONAL PROG	71400	4,563,624	4,611,624	12,432	-	-	-	1,000	1,124	-	-	-	4,564,624	4,612,748	12,432
ATTENDANCE	72110	7,788,126	9,004,381	751,512	74,400	164,247	12,401	-	-	-	-	-	7,862,526	9,168,628	763,913
HEALTH SERVICES	72120	7,027,172	7,027,172	514,615	50,000	56,765	-	339,036	354,036	8,223	-	-	7,416,208	7,437,973	522,838
OTHER STUDENT SUPPORT	72130	28,610,569	30,111,722	2,951,148	5,741,369	5,871,150	366,975	220,000	249,245	-	-	-	34,571,938	36,232,117	3,318,123
REG INST SUPPORT	72210	29,734,786	29,952,392	3,398,689	9,283,328	8,237,001	895,900	1,213,948	1,444,644	159,140	-	-	40,232,062	39,634,037	4,453,729
SPECIAL ED INST SUPPORT	72220	12,609,004	12,961,233	808,309	2,242,397	2,242,397	137,156	-	-	-	-	-	14,851,401	15,203,630	945,465
VOCATIONAL ED INST SUPPORT	72230	1,201,742	1,161,875	93,867	10,000	11,200	1,237	-	-	-	-	-	1,211,742	1,173,075	95,103
EDUCATION TECHNOLOGY	72250	9,227,277	9,227,277	1,640,859	-	-	-	-	-	-	-	-	9,227,277	9,227,277	1,640,859
BOARD OF EDUCATION	72310	6,928,477	6,928,477	781,581	-	-	-	100,000	100,000	(15,319)	-	-	7,028,477	7,028,477	766,261
OFFICE OF SUPERINTENDENT	72320	2,873,493	2,873,493	393,035	-	-	-	113,877	113,877	12,243	-	-	2,987,370	2,987,370	405,278
OFFICE OF PRINCIPAL	72410	38,488,175	38,488,175	4,901,182	-	-	-	18,000	18,000	-	-	-	38,506,175	38,506,175	4,901,182
FISCAL SERVICES	72510	4,510,135	4,510,135	601,718	-	-	-	-	-	-	-	-	4,510,135	4,510,135	601,718
HUMAN RESOURCES	72520	4,568,932	4,662,252	453,230	155,460	385,997	19,395	50,291	54,791	4,591	-	-	4,774,683	5,103,040	477,216
OPERATION OF PLANT	72610	35,490,091	35,540,588	3,053,417	-	-	428,145	2,000	2,601	-	-	-	35,492,091	35,543,189	3,481,562
MAINTENANCE OF PLANT	72620	12,312,491	12,312,491	1,963,586	-	-	-	-	138,545	-	-	-	12,312,491	12,451,036	1,963,586
TRANSPORTATION	72710	29,051,159	28,987,481	1,903,597	241,105	363,874	12,864	33,000	36,022	-	-	-	29,325,264	29,387,377	1,916,460
CENTRAL AND OTHER	72810	2,676,353	2,458,660	96,805	-	-	-	13,000	13,000	-	-	-	2,689,353	2,471,660	96,805
FOOD SERVICE	73100	5,850	5,850	925	-	-	-	-	-	-	-	-	30,349,669	30,355,519	2,242,210
COMMUNITY SERVICES	73300	748,518	753,494	89,667	365,201	365,201	-	3,957,973	3,957,973	435,620	-	-	5,071,692	5,076,668	525,288
EARLY CHILDHOOD EDUCATION	73400	2,908,533	3,096,795	239,693	2,364,558	1,205,104	187,063	564,643	583,143	53,081	-	-	5,837,734	4,885,042	479,837
REGULAR CAPITAL OUTLAY	76100	1,461,548	1,493,591	97,570	-	-	-	20,001,000	29,417,249	1,306,092	-	-	21,462,548	30,910,840	1,403,662
EDUCATION DEBT SERVICE		-	-	-	-	-	-	-	-	-	-	-	-	-	-
EDUCATION CAPITAL PROJECTS		-	-	-	880,558	610,690	-	3,750	4,902	-	-	-	884,308	615,592	-
CHARTER SCHOOLS (TRANSFERS )		40,782,369	41,321,041	2,675,459	-	-	-	-	-	-	-	-	40,782,369	41,321,041	2,675,459
TRANSFERS-STATE GRANTS		-	-	-	-	-	-	-	-	-	-	-	-	-	-
TRANSFERS TO FUND BALANCE		-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>TOTAL EXPENDITURES</b>		<b>593,462,554</b>	<b>602,042,128</b>	<b>60,467,469</b>	<b>36,439,010</b>	<b>36,735,645</b>	<b>3,189,769</b>	<b>31,978,556</b>	<b>42,128,391</b>	<b>2,254,960</b>	<b>30,349,669</b>	<b>30,349,669</b>	<b>692,229,789</b>	<b>711,255,833</b>	<b>68,154,408</b>

**To:** Hamilton County Board of Education  
Dr. Justin Robertson, Superintendent

**From:** Mary Ellen Heuton, Chief Financial Officer, Finance

**Date:** October 9, 2025

**Subject:** Budget Amendments – Federal Grants, State Grants and Self-Funded Programs

**Board Agenda Category:**

- Consent Agenda
  - Action Item
  - Reports and Information
- 

The Federal Programs budget is amended by items 1 – 3. Item 1 consists of a current year award. Items 2 - 3 consist of current year awards and carryover funds.

The State Programs budget is amended by item 4, which consists of a current year award.

The Self-Funded Programs budget is amended by items 5 - 9. Items 5, 7, & 8 consist of current year contributions and carryover contributions. Items 6 and 9 consist of current year contributions.

1. 21<sup>st</sup> Century Community Learning Centers Cohort 2022, with transfers between lines
2. McKinney-Vento, Title IX, Part A: Homeless Education, with a net increase of \$7,908
3. Enhancing School Capacity to Address Youth Violence, with a net increase of \$398,580
4. State Special Education Preschool Grant, with a net increase of \$291,648 and transfers between lines
5. Accelerate Learning, with transfers between lines
6. Hamilton County Government Funds, with a net increase of \$3,210,158 and transfers between lines
7. Future Ready Institutes – Hixson High, with transfers between lines
8. HCS Foundation, with a net increase of \$795 and transfers between lines
9. School Age Child Care, with transfers between lines

**Opportunity 2030 Commitment Connection**

- Every Student Learns
- Every Student Belongs
- Every School Equipped
- Every Employee Valued
- Every Community Served

**FEDERAL PROGRAMS**

**SOURCE OF FUNDS**

October 9, 2025

	FEDERAL THROUGH STATE 47100	DIRECT FEDERAL FUNDS 47990	TOTAL REVENUE	AMENDMENT ITEM #
<b>BUDGET AMENDMENTS</b>				
21st Century Community Learning Centers Cohort 2022 (Year 4)	-		-	1
McKinney-Vento, Title IX, Part A: Homeless Education	7,908		7,908	2
Enhancing School Capacity to Address Youth Violence		398,580	398,580	3
	<u>7,908</u>	<u>398,580</u>	<u>406,488</u>	

**FEDERAL PROGRAMS**

**USE OF FUNDS**

October 9, 2025

BUDGET AMENDMENTS	OTHER STUDENT SUPPORT 72130	TRANSPORTATION 72710	COMMUNITY SERVICES 73300	INDIRECT COST 99100	TOTAL AMENDMENT AMOUNT	AMENDMENT ITEM #
21st Century Community Learning Centers Cohort 2022 (Year 4)			-		-	1
McKinney-Vento, Title IX, Part A: Homeless Education		7,908			7,908	2
Enhancing School Capacity to Address Youth Violence	348,324	2,000		48,256	398,580	3
	348,324	9,908	-	48,256	406,488	

**STATE PROGRAMS**  
**SOURCE OF FUNDS**

October 9, 2025

<u>BUDGET AMENDMENTS</u>	STATE REVENUE 46000	TOTAL REVENUE	AMENDMENT ITEM #
State Special Education Preschool Grant	291,648	291,648	4

**STATE PROGRAMS**  
**USE OF FUNDS**

October 9, 2025

<u>BUDGET AMENDMENTS</u>	<u>SPECIAL EDUCATION INSTRUCTION 71200</u>	<u>TOTAL AMENDMENT AMOUNT</u>	<u>AMENDMENT ITEM #</u>
State Special Education Preschool Grant	291,648	291,648	4

**SELF-FUNDED PROGRAMS**  
**SOURCE OF FUNDS**

October 9, 2025

	RESTRICTED FOR EDUCATION FUND BALANCE	CHARGES FOR CURRENT SERVICES	OTHER LOCAL REVENUES	OTHER GOVERNMENT GROUPS	TOTAL AMENDMENT AMOUNT	AMENDMENT ITEM #
BUDGET AMENDMENTS	34555	43000	44000	48000		
Accelerate Learning	-		-		-	5
Hamilton County Government Funds				3,210,158	3,210,158	6
Future Ready Institutes - Hixson High	-		-		-	7
HCS Foundation	795		-		795	8
School Age Child Care		-	-		-	9
	795	-	-	3,210,158	3,210,953	

**SELF-FUNDED PROGRAMS**  
**USE OF FUNDS**

October 9, 2025

BUDGET AMENDMENTS	REGULAR INSTRUCTION 71100	VOCATIONAL EDUCATION INSTRUCTION 71300	REGULAR INSTRUCTION SUPPORT 72210	COMMUNITY SERVICES 73300	REGULAR CAPITOL OUTLAY 76100	TOTAL AMENDMENT AMOUNT	AMENDMENT ITEM #
Accelerate Learning	(3,654)		3,654			-	5
Hamilton County Government Funds					3,210,158	3,210,158	6
Future Ready Institutes - Hixson High	(5,000)	5000				-	7
HCS Foundation			795			795	8
School Age Child Care					-	-	9
	(8,654)	5,000	4,449	-	3,210,158	3,210,953	

**HAMILTON COUNTY DEPARTMENT OF EDUCATION  
 FEDERAL PROGRAMS  
 21ST CENTURY COMMUNITY LEARNING CENTERS COHORT 2022 (Year 4)  
 BUDGET FISCAL YEAR 2025-2026**

After School Programs at Red Bank Elem, Spring Creek Elem, and MEHP  
 FY26 allocation is \$247,168.00

**SOURCE OF FUNDS SUMMARY**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET		AMENDED BUDGET	
		9/18/2025	INCREASE	DECREASE	10/9/2025
141-2-186-0000-0-00000-471500-0000-0000-186	21st CCLC Grant	247,168			247,168
	<b>Total Source of Funds</b>	<b>247,168</b>	<b>-</b>	<b>-</b>	<b>247,168</b>

**USE OF FUNDS SUMMARY**

<b>73300</b>	Community Services	239,898	200	(200)	239,898
<b>99100</b>	Indirect Cost	7,270	-	-	7,270
	<b>Total Use of Funds</b>	<b>247,168</b>	<b>200</b>	<b>(200)</b>	<b>247,168</b>

**USE OF FUNDS DETAIL**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET		AMENDED BUDGET	
		9/18/2025	INCREASE	DECREASE	10/9/2025
<b><u>Red Bank Elementary</u></b>					
141-2-186-0171-1-73300-514090-0000-0000-186	Teacher Extended Contracts	63,165			63,165
141-2-186-0171-1-73300-518990-0000-0000-186	Other Salaries	5,781			5,781
141-2-186-0171-1-73300-520110-0000-0000-186	Social Security	4,275			4,275
141-2-186-0171-1-73300-520410-0000-0000-186	State Retirement	6,535			6,535
141-2-186-0171-1-73300-521210-0000-0000-186	Medicare	1,000			1,000
141-2-186-0171-1-73300-542910-0000-0000-186	Instructional Supplies & Materials	6,219			6,219
	<b>Total 73300 - Community Services</b>	<b>86,975</b>	<b>-</b>	<b>-</b>	<b>86,975</b>
141-2-186-0171-1-99100-550410-0000-0000-186	Indirect Cost (3.06%)	2,661			2,661
	<b>Total 99100 - Indirect Cost</b>	<b>2,661</b>	<b>-</b>	<b>-</b>	<b>2,661</b>
	<b>Total Red Bank Elementary</b>	<b>89,636</b>	<b>-</b>	<b>-</b>	<b>89,636</b>
<b><u>Spring Creek Elementary</u></b>					
141-2-186-0235-1-73300-514090-0000-0000-186	Teacher Extended Contracts	69,181			69,181
141-2-186-0235-1-73300-518990-0000-0000-186	Other Salaries	10,148			10,148
141-2-186-0235-1-73300-520110-0000-0000-186	Social Security	4,919			4,919
141-2-186-0235-1-73300-520410-0000-0000-186	State Retirement	7,719			7,719
141-2-186-0235-1-73300-521210-0000-0000-186	Medicare	1,151			1,151
141-2-186-0235-1-73300-539990-0000-0000-186	Contracted Services	1,622			1,622
141-2-186-0235-1-73300-542910-0000-0000-186	Instructional Supplies & Materials	8,465		(97)	8,368
141-2-186-0235-1-73300-547110-0000-0000-186	Software	1,183		(103)	1,080
141-2-186-0235-1-73300-552410-0000-0000-186	In Service/Staff Development	-	200		200
	<b>Total 73300 - Community Services</b>	<b>104,388</b>	<b>200</b>	<b>(200)</b>	<b>104,388</b>
141-2-186-0235-1-99100-550410-0000-0000-186	Indirect Cost (3.06%)	3,144			3,144
	<b>Total 99100 - Indirect Cost</b>	<b>3,144</b>	<b>-</b>	<b>-</b>	<b>3,144</b>
	<b>Total Spring Creek Elementary</b>	<b>107,532</b>	<b>200</b>	<b>(200)</b>	<b>107,532</b>
<b><u>Montessori School (MEHP)</u></b>					
141-2-186-8142-8-73300-539990-0000-0000-186	Contracted Services	640			640
141-2-186-8142-8-73300-542910-0000-0000-186	Instructional Supplies & Materials	6,685			6,685
141-2-186-8142-8-73300-559990-0000-0000-186	Other Charges - Charter School Personnel	41,210			41,210
	<b>Total 73300 - Community Services</b>	<b>48,535</b>	<b>-</b>	<b>-</b>	<b>48,535</b>
141-2-186-8142-8-99100-550410-0000-0000-186	Indirect Cost (3.06%)	1,465			1,465
	<b>Total 99100 - Indirect Cost</b>	<b>1,465</b>	<b>-</b>	<b>-</b>	<b>1,465</b>
	<b>Total Montessori School</b>	<b>50,000</b>	<b>-</b>	<b>-</b>	<b>50,000</b>
	<b>TOTAL BUDGET</b>	<b>247,168</b>	<b>200</b>	<b>(200)</b>	<b>247,168</b>

**HAMILTON COUNTY DEPARTMENT OF EDUCATION  
 FEDERAL PROGRAMS  
 McKINNEY-VENTO, TITLE IX, PART A: HOMELESS EDUCATION  
 BUDGET FISCAL YEAR 2025-2026**

FY26 allocation is \$339,387.54  
 FY25 carryover is \$7,907.88

**SOURCE OF FUNDS SUMMARY**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET			
		7/17/2025	INCREASE	DECREASE	AMENDED BUDGET 10/9/2025
141-2-190-0000-0-00000-471490-0000-0000-190	Education for Homeless Children	339,387	7,908	-	347,295
	<b>Total Source of Funds</b>	<b>339,387</b>	<b>7,908</b>	<b>-</b>	<b>347,295</b>

**USE OF FUNDS SUMMARY**

<b>71100</b>	Regular Instruction	72,500	-	-	72,500
<b>72130</b>	Other Student Support	18,353	-	-	18,353
<b>72210</b>	Instructional Support	156,531	-	-	156,531
<b>72710</b>	Transportation	84,816	7,908	-	92,724
<b>99100</b>	Indirect Cost	7,187	-	-	7,187
	<b>Total Use of Funds</b>	<b>339,387</b>	<b>7,908</b>	<b>-</b>	<b>347,295</b>

**USE OF FUNDS DETAIL**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET			
		7/17/2025	INCREASE	DECREASE	AMENDED BUDGET 10/9/2025
141-2-190-0000-0-71100-542910-0000-0000-190	Instructional Supplies	20,000			20,000
141-2-190-0000-0-71100-539990-0000-0000-190	Contracted Tutors	12,500			12,500
141-2-190-0000-0-71100-549990-0000-0000-190	Other Supplies & Materials	40,000			40,000
	<b>Total 71100 - Regular Instruction</b>	<b>72,500</b>	<b>-</b>	<b>-</b>	<b>72,500</b>
141-2-190-0000-0-72130-513010-0000-0000-190	Social Worker Stipends	15,000			15,000
141-2-190-0000-0-72130-520110-0000-0000-190	Social Security	930			930
141-2-190-0000-0-72130-520410-0000-0000-190	State Retirement	2,205			2,205
141-2-190-0000-0-72130-521210-0000-0000-190	Employer Medicare	218			218
	<b>Total 72130 - Other Student Support</b>	<b>18,353</b>	<b>-</b>	<b>-</b>	<b>18,353</b>
141-2-190-0000-0-72210-516210-PBEN-0000-190	Clerical Assistant (1.0 FTE)	34,000			34,000
141-2-190-0000-0-72210-5189A0-PBEN-0000-190	Homeless Specialist (2.0 FTE)	58,500			58,500
141-2-190-0000-0-72210-520110-PBEN-0000-190	Social Security	5,735			5,735
141-2-190-0000-0-72210-520410-PBEN-0000-190	State Retirement	11,748			11,748
141-2-190-0000-0-72210-520610-PBEN-0000-190	Life Insurance	80			80
141-2-190-0000-0-72210-520710-PBEN-0000-190	Health Insurance	26,640			26,640
141-2-190-0000-0-72210-520810-PBEN-0000-190	Dental Insurance	588			588
141-2-190-0000-0-72210-521010-PBEN-0000-190	Unemployment	28			28
141-2-190-0000-0-72210-521210-PBEN-0000-190	Employer Medicare	1,341			1,341
141-2-190-0000-0-72210-529910-PBEN-0000-190	Long Term Disability	214			214
141-2-190-0000-0-72210-529930-PBEN-0000-190	Short Term Disability	232			232
141-2-190-0000-0-72210-535510-0000-0000-190	Travel	10,500			10,500
141-2-190-0000-0-72210-549990-0000-0000-190	Other Supplies & Materials	1,500			1,500
141-2-190-0000-0-72210-552410-0000-0000-190	In-Service/Staff Development	5,425			5,425
	<b>Total 72210 - Instructional Support</b>	<b>156,531</b>	<b>-</b>	<b>-</b>	<b>156,531</b>
141-2-190-0000-0-72710-531410-0000-0000-190	Contracts with Public Carriers	84,816	5,908		90,724
141-2-190-0000-0-72710-559990-0000-0000-190	Other Charges	-	2,000		2,000
	<b>Total 72710 - Transportation</b>	<b>84,816</b>	<b>7,908</b>	<b>-</b>	<b>92,724</b>
141-2-190-0000-0-99100-550410-0000-0000-190	Indirect Cost (3.06%)	7,187			7,187
	<b>Total 99100 - Indirect Cost</b>	<b>7,187</b>	<b>-</b>	<b>-</b>	<b>7,187</b>
	<b>TOTAL BUDGET</b>	<b>339,387</b>	<b>7,908</b>	<b>-</b>	<b>347,295</b>

**HAMILTON COUNTY DEPARTMENT OF EDUCATION  
 FEDERAL PROGRAMS  
 ENHANCING SCHOOL CAPACITY TO ADDRESS YOUTH VIOLENCE  
 BUDGET FISCAL YEAR 2025-2026**

FY25 carryover is \$376,095

FY26 award is \$332,485

**SOURCE OF FUNDS SUMMARY**

ACCOUNT CODE	DESCRIPTION	FY2026 BUDGET		AMENDED BUDGET
		DOCUMENT INCREASE	DECREASE	10/9/2025
141-2-198-0000-0-00000-479900-0000-0000-198	Revenue	310,000	398,580	708,580
	<b>Total Source of Funds</b>	<b>310,000</b>	<b>398,580</b>	<b>- 708,580</b>

**USE OF FUNDS SUMMARY**

<b>72130</b>	Other Student Support	286,842	348,324	-	635,166
<b>72710</b>	Transportation	-	2,000	-	2,000
<b>99100</b>	Indirect Cost	23,158	48,256	-	71,414
	<b>Total Use of Funds</b>	<b>310,000</b>	<b>398,580</b>	<b>-</b>	<b>708,580</b>

**USE OF FUNDS DETAIL**

ACCOUNT CODE	DESCRIPTION	FY2026 BUDGET		AMENDED BUDGET
		DOCUMENT INCREASE	DECREASE	10/9/2025
141-2-198-7250-7-72130-518990-0000-0000-198	Other Salaries	30,000	39,750	69,750
141-2-198-7250-7-72130-518990-PBEN-0000-198	Project Coordinator (1.0 FTE)	62,511	11,907	74,418
141-2-198-7250-7-72130-520110-0000-0000-198	Social Security	1,860	2,465	4,325
141-2-198-7250-7-72130-520110-PBEN-0000-198	Social Security	3,876	738	4,614
141-2-198-7250-7-72130-520410-0000-0000-198	State Retirement	2,400	3,180	5,580
141-2-198-7250-7-72130-520410-PBEN-0000-198	State Retirement	9,189	262	9,451
141-2-198-7250-7-72130-520610-PBEN-0000-198	Life Insurance	40	10	50
141-2-198-7250-7-72130-520710-PBEN-0000-198	Medical Insurance	13,320	3,330	16,650
141-2-198-7250-7-72130-520810-PBEN-0000-198	Dental Insurance	294	74	368
141-2-198-7250-7-72130-521010-PBEN-0000-198	Unemployment	14	4	18
141-2-198-7250-7-72130-521210-0000-0000-198	Employer Medicare	435	576	1,011
141-2-198-7250-7-72130-521210-PBEN-0000-198	Employer Medicare	906	173	1,079
141-2-198-7250-7-72130-529910-PBEN-0000-198	Long Term Disability	107	27	134
141-2-198-7250-7-72130-529930-PBEN-0000-198	Short Term Disability	116	29	145
141-2-198-7250-7-72130-535510-0000-0000-198	Travel-Mileage	2,774	911	3,685
141-2-198-7250-7-72130-539990-0000-0000-198	Other Contracted Services	149,000	282,388	431,388
141-2-198-7250-7-72130-549990-0000-0000-198	Other Supplies And Materials	5,000	1,250	6,250
141-2-198-7250-7-72130-552410-0000-0000-198	In Service/Staff Development	5,000	1,250	6,250
	<b>Total 72130 - Other Student Support</b>	<b>286,842</b>	<b>348,324</b>	<b>- 635,166</b>
141-2-198-7250-7-72710-531410-0000-0000-198	Contracts with Public Carriers	-	2,000	2,000
	<b>Total 72710 - Transportation</b>	<b>-</b>	<b>2,000</b>	<b>- 2,000</b>
141-2-198-0000-0-99100-550410-0000-0000-198	Indirect Cost (18.35%)	23,158	48,256	71,414
	<b>Total 99100 - Indirect Cost</b>	<b>23,158</b>	<b>48,256</b>	<b>- 71,414</b>
	<b>TOTAL BUDGET</b>	<b>310,000</b>	<b>398,580</b>	<b>- 708,580</b>

This grant will award a 3rd and final allocation in October of \$332,485 and ends 9/30/26

**HAMILTON COUNTY DEPARTMENT OF EDUCATION  
STATE PROGRAMS  
STATE SPECIAL EDUCATION PRESCHOOL GRANT  
BUDGET FISCAL YEAR 2025-2026**

2026 Award	675,000	291,648		966,648
<b>Total Source of Funds</b>	<b>675,000</b>	<b>291,648</b>	<b>-</b>	<b>966,648</b>

**SOURCE OF FUNDS SUMMARY**

ACCOUNT CODE	DESCRIPTION	FY2026 BUDGET DOCUMENT	INCREASE	DECREASE	AMENDED BUDGET 10/9/2025
141-1-221-0000-0-00000-465150-0000-0000-221	Revenue	675,000	291,648		966,648
	<b>Total Source of Funds</b>	<b>675,000</b>	<b>291,648</b>	<b>-</b>	<b>966,648</b>

**USE OF FUNDS SUMMARY**

<b>71200</b> Special Education Instruction	675,000	296,170	(4,522)	966,648
<b>Total Use of Funds</b>	<b>675,000</b>	<b>296,170</b>	<b>(4,522)</b>	<b>966,648</b>

**USE OF FUNDS DETAIL**

ACCOUNT CODE	DESCRIPTION	FY2026 BUDGET DOCUMENT	INCREASE	DECREASE	AMENDED BUDGET 10/9/2025
<b>DLP - PreSchool Programs</b>					
<b>Apison Elementary</b>					
141-1-221-0013-6-71200-5116P0-PBEN-0000-221	Teacher - DLP (.6 FTE)	27,250	4,250		31,500
141-1-221-0013-6-71200-520110-PBEN-0000-221	Social Security	1,690	263		1,953
141-1-221-0013-6-71200-520410-PBEN-0000-221	State Retirement	2,453	382		2,835
141-1-221-0013-6-71200-520610-PBEN-0000-221	Life Insurance	20	4		24
141-1-221-0013-6-71200-520710-PBEN-0000-221	Health Insurance	6,660	1,332		7,992
141-1-221-0013-6-71200-520810-PBEN-0000-221	Dental Insurance	163	32		195
141-1-221-0013-6-71200-521010-PBEN-0000-221	Unemployment Compensation	7	1		8
141-1-221-0013-6-71200-521210-PBEN-0000-221	Medicare	395	62		457
141-1-221-0013-6-71200-529910-PBEN-0000-221	Long Term Disability	54	10		64
141-1-221-0013-6-71200-529930-PBEN-0000-221	Short Term Disability	58	12		70
	<b>Total 71200 - Special Education Instruction - Apison DLP</b>	<b>38,750</b>	<b>6,348</b>	<b>-</b>	<b>45,098</b>
<b>Brown Academy</b>					
141-1-221-0033-6-71200-5116P0-PBEN-0000-221	Teacher - DLP (.6 FTE)	27,250	4,250		31,500
141-1-221-0033-6-71200-520110-PBEN-0000-221	Social Security	1,690	263		1,953
141-1-221-0033-6-71200-520410-PBEN-0000-221	State Retirement	2,453	382		2,835
141-1-221-0033-6-71200-520610-PBEN-0000-221	Life Insurance	20	4		24
141-1-221-0033-6-71200-520710-PBEN-0000-221	Health Insurance	6,660	1,332		7,992
141-1-221-0033-6-71200-520810-PBEN-0000-221	Dental Insurance	163	32		195
141-1-221-0033-6-71200-521010-PBEN-0000-221	Unemployment Compensation	7	1		8
141-1-221-0033-6-71200-521210-PBEN-0000-221	Medicare	395	62		457
141-1-221-0033-6-71200-529910-PBEN-0000-221	Long Term Disability	54	10		64
141-1-221-0033-6-71200-529930-PBEN-0000-221	Short Term Disability	58	12		70
	<b>Total 71200 - Special Education - Brown Academy</b>	<b>38,750</b>	<b>6,348</b>	<b>-</b>	<b>45,098</b>
<b>Daisy Elementary</b>					
141-1-221-0050-6-71200-5116P0-PBEN-0000-221	Teacher - DLP (.6 FTE)	27,250	4,250		31,500
141-1-221-0050-6-71200-520110-PBEN-0000-221	Social Security	1,690	263		1,953
141-1-221-0050-6-71200-520410-PBEN-0000-221	State Retirement	2,453	382		2,835
141-1-221-0050-6-71200-520610-PBEN-0000-221	Life Insurance	20	4		24
141-1-221-0050-6-71200-520710-PBEN-0000-221	Health Insurance	6,660	1,332		7,992
141-1-221-0050-6-71200-520810-PBEN-0000-221	Dental Insurance	163	32		195
141-1-221-0050-6-71200-521010-PBEN-0000-221	Unemployment Compensation	7	1		8
141-1-221-0050-6-71200-521210-PBEN-0000-221	Medicare	395	62		457
141-1-221-0050-6-71200-529910-PBEN-0000-221	Long Term Disability	54	10		64
141-1-221-0050-6-71200-529930-PBEN-0000-221	Short Term Disability	58	12		70
	<b>Total 71200 - Special Education - Daisy Elementary</b>	<b>38,750</b>	<b>6,348</b>	<b>-</b>	<b>45,098</b>
<b>East Side Elementary</b>					
141-1-221-0078-6-71200-5116P0-PBEN-0000-221	Teacher - DLP (.6 FTE)	41,168		(3,877)	37,291
141-1-221-0078-6-71200-520110-PBEN-0000-221	Social Security	2,552		(240)	2,312
141-1-221-0078-6-71200-520410-PBEN-0000-221	State Retirement	3,705		(349)	3,356
141-1-221-0078-6-71200-520610-PBEN-0000-221	Life Insurance	20	4		24
141-1-221-0078-6-71200-520710-PBEN-0000-221	Health Insurance	6,660	1,332		7,992
141-1-221-0078-6-71200-520810-PBEN-0000-221	Dental Insurance	163	32		195
141-1-221-0078-6-71200-521010-PBEN-0000-221	Unemployment Compensation	7	1		8
141-1-221-0078-6-71200-521210-PBEN-0000-221	Medicare	597		(56)	541
141-1-221-0078-6-71200-529910-PBEN-0000-221	Long Term Disability	54	10		64
141-1-221-0078-6-71200-529930-PBEN-0000-221	Short Term Disability	58	12		70
	<b>Total 71200 - Special Education Instruction - East Side Elem DLP</b>	<b>54,984</b>	<b>1,391</b>	<b>(4,522)</b>	<b>51,853</b>

ACCOUNT CODE	DESCRIPTION	FY2026 BUDGET			AMENDED BUDGET
		DOCUMENT	INCREASE	DECREASE	10/9/2025
<b>East Brainerd Elementary</b>					
141-1-221-0062-6-71200-5116P0-PBEN-0000-221	Teacher - DLP (.6 FTE)	27,250	4,250		31,500
141-1-221-0062-6-71200-520110-PBEN-0000-221	Social Security	1,690	263		1,953
141-1-221-0062-6-71200-520410-PBEN-0000-221	State Retirement	2,453	382		2,835
141-1-221-0062-6-71200-520610-PBEN-0000-221	Life Insurance	20	4		24
141-1-221-0062-6-71200-520710-PBEN-0000-221	Health Insurance	6,660	1,332		7,992
141-1-221-0062-6-71200-520810-PBEN-0000-221	Dental Insurance	163	32		195
141-1-221-0062-6-71200-521010-PBEN-0000-221	Unemployment Compensation	7	1		8
141-1-221-0062-6-71200-521210-PBEN-0000-221	Medicare	395	62		457
141-1-221-0062-6-71200-529910-PBEN-0000-221	Long Term Disability	54	10		64
141-1-221-0062-6-71200-529930-PBEN-0000-221	Short Term Disability	58	12		70
	<b>Total 71200 - Special Education Instruction - East Brainerd DLP</b>	<b>38,750</b>	<b>6,348</b>	<b>-</b>	<b>45,098</b>
<b>Middle Valley Elementary</b>					
141-1-221-0085-6-71200-5116P0-PBEN-0000-221	Teacher - DLP (1.2 FTE)	66,200	23,283		89,483
141-1-221-0085-6-71200-520110-PBEN-0000-221	Social Security	4,104	1,444		5,548
141-1-221-0085-6-71200-520410-PBEN-0000-221	State Retirement	5,958	2,095		8,053
141-1-221-0085-6-71200-520610-PBEN-0000-221	Life Insurance	20	4		24
141-1-221-0085-6-71200-520710-PBEN-0000-221	Health Insurance	6,660	1,332		7,992
141-1-221-0085-6-71200-520810-PBEN-0000-221	Dental Insurance	163	32		195
141-1-221-0085-6-71200-521010-PBEN-0000-221	Unemployment Compensation	7	1		8
141-1-221-0085-6-71200-521210-PBEN-0000-221	Medicare	960	338		1,298
141-1-221-0085-6-71200-529910-PBEN-0000-221	Long Term Disability	54	10		64
141-1-221-0085-6-71200-529930-PBEN-0000-221	Short Term Disability	58	12		70
	<b>Total 71200 - Special Education Instruction - Middle Valley DLP</b>	<b>84,184</b>	<b>28,551</b>	<b>-</b>	<b>112,735</b>
<b>Harrison Elementary</b>					
141-1-221-0090-6-71200-5116P0-PBEN-0000-221	Teacher - DLP (.6 FTE)	27,250	4,250		31,500
141-1-221-0090-6-71200-520110-PBEN-0000-221	Social Security	1,690	263		1,953
141-1-221-0090-6-71200-520410-PBEN-0000-221	State Retirement	2,453	382		2,835
141-1-221-0090-6-71200-520610-PBEN-0000-221	Life Insurance	20	4		24
141-1-221-0090-6-71200-520710-PBEN-0000-221	Health Insurance	6,660	1,332		7,992
141-1-221-0090-6-71200-520810-PBEN-0000-221	Dental Insurance	163	32		195
141-1-221-0090-6-71200-521010-PBEN-0000-221	Unemployment Compensation	7	1		8
141-1-221-0090-6-71200-521210-PBEN-0000-221	Medicare	395	62		457
141-1-221-0090-6-71200-529910-PBEN-0000-221	Long Term Disability	54	10		64
141-1-221-0090-6-71200-529930-PBEN-0000-221	Short Term Disability	58	12		70
	<b>Total 71200 - Special Education Instruction - Harrison DLP</b>	<b>38,750</b>	<b>6,348</b>	<b>-</b>	<b>45,098</b>
<b>Wolftever Elementary</b>					
141-1-221-0148-6-71200-5116P0-PBEN-0000-221	Teacher - DLP (.6 FTE)	27,250	17,760		45,010
141-1-221-0148-6-71200-520110-PBEN-0000-221	Social Security	1,690	1,101		2,791
141-1-221-0148-6-71200-520410-PBEN-0000-221	State Retirement	2,453	1,598		4,051
141-1-221-0148-6-71200-520610-PBEN-0000-221	Life Insurance	20	4		24
141-1-221-0148-6-71200-520710-PBEN-0000-221	Health Insurance	6,660	1,332		7,992
141-1-221-0148-6-71200-520810-PBEN-0000-221	Dental Insurance	163	32		195
141-1-221-0148-6-71200-521010-PBEN-0000-221	Unemployment Compensation	7	1		8
141-1-221-0148-6-71200-521210-PBEN-0000-221	Medicare	395	258		653
141-1-221-0148-6-71200-529910-PBEN-0000-221	Long Term Disability	54	10		64
141-1-221-0148-6-71200-529930-PBEN-0000-221	Short Term Disability	58	12		70
	<b>Total 71200 - Special Education Instruction - Wolftever DLP</b>	<b>38,750</b>	<b>22,108</b>	<b>-</b>	<b>60,858</b>
<b>Nolan Elementary</b>					
141-1-221-0149-6-71200-5116P0-PBEN-0000-221	Teacher - DLP (.6 FTE)	28,750	4,550		33,300
141-1-221-0149-6-71200-520110-PBEN-0000-221	Social Security	1,782	283		2,065
141-1-221-0149-6-71200-520410-PBEN-0000-221	State Retirement	2,587	410		2,997
141-1-221-0149-6-71200-520610-PBEN-0000-221	Life Insurance	20	4		24
141-1-221-0149-6-71200-520710-PBEN-0000-221	Health Insurance	6,660	1,332		7,992
141-1-221-0149-6-71200-520810-PBEN-0000-221	Dental Insurance	163	32		195
141-1-221-0149-6-71200-521010-PBEN-0000-221	Unemployment Compensation	7	1		8
141-1-221-0149-6-71200-521210-PBEN-0000-221	Medicare	417	66		483
141-1-221-0149-6-71200-529910-PBEN-0000-221	Long Term Disability	54	10		64
141-1-221-0149-6-71200-529930-PBEN-0000-221	Short Term Disability	58	12		70
	<b>Total 71200 - Special Education Instruction - Nolan DLP</b>	<b>40,498</b>	<b>6,700</b>	<b>-</b>	<b>47,198</b>
<b>Ooltewah Elementary</b>					
141-1-221-0155-6-71200-5116P0-PBEN-0000-221	Teacher - DLP (.6 FTE)	31,411	5,082		36,493
141-1-221-0155-6-71200-520110-PBEN-0000-221	Social Security	1,947	316		2,263
141-1-221-0155-6-71200-520410-PBEN-0000-221	State Retirement	2,827	457		3,284
141-1-221-0155-6-71200-520610-PBEN-0000-221	Life Insurance	20	4		24
141-1-221-0155-6-71200-520710-PBEN-0000-221	Health Insurance	6,660	1,332		7,992
141-1-221-0155-6-71200-520810-PBEN-0000-221	Dental Insurance	163	32		195
141-1-221-0155-6-71200-521010-PBEN-0000-221	Unemployment Compensation	7	1		8
141-1-221-0155-6-71200-521210-PBEN-0000-221	Medicare	455	74		529
141-1-221-0155-6-71200-529910-PBEN-0000-221	Long Term Disability	54	10		64
141-1-221-0155-6-71200-529930-PBEN-0000-221	Short Term Disability	58	12		70
	<b>Total 71200 - Special Education Instruction - Ooltewah DLP</b>	<b>43,602</b>	<b>7,320</b>	<b>-</b>	<b>50,922</b>

ACCOUNT CODE	DESCRIPTION	FY2026 BUDGET		AMENDED
		DOCUMENT	INCREASE	DECREASE
<b>Red Bank Elementary</b>				
141-1-221-0171-6-71200-5116P0-PBEN-0000-221	Teacher - DLP (.6 FTE)	20,443	19,243	39,686
141-1-221-0171-6-71200-520110-PBEN-0000-221	Social Security	1,267	1,194	2,461
141-1-221-0171-6-71200-520410-PBEN-0000-221	State Retirement	1,840	1,732	3,572
141-1-221-0171-6-71200-520610-PBEN-0000-221	Life Insurance	12	12	24
141-1-221-0171-6-71200-520710-PBEN-0000-221	Health Insurance	3,996	3,996	7,992
141-1-221-0171-6-71200-520810-PBEN-0000-221	Dental Insurance	98	97	195
141-1-221-0171-6-71200-521010-PBEN-0000-221	Unemployment Compensation	4	4	8
141-1-221-0171-6-71200-521210-PBEN-0000-221	Medicare	296	279	575
141-1-221-0171-6-71200-529910-PBEN-0000-221	Long Term Disability	32	32	64
141-1-221-0171-6-71200-529930-PBEN-0000-221	Short Term Disability	35	35	70
	<b>Total 71200 - Special Education Instruction - Red Bank DLP</b>	<b>28,023</b>	<b>26,624</b>	<b>- 54,647</b>
<b>Rivermont Elementary</b>				
141-1-221-0183-6-71200-5116P0-PBEN-0000-221	Teacher - DLP (.6 FTE)	18,846	17,647	36,493
141-1-221-0183-6-71200-520110-PBEN-0000-221	Social Security	1,168	1,095	2,263
141-1-221-0183-6-71200-520410-PBEN-0000-221	State Retirement	1,696	1,588	3,284
141-1-221-0183-6-71200-520610-PBEN-0000-221	Life Insurance	12	12	24
141-1-221-0183-6-71200-520710-PBEN-0000-221	Health Insurance	3,996	3,996	7,992
141-1-221-0183-6-71200-520810-PBEN-0000-221	Dental Insurance	98	97	195
141-1-221-0183-6-71200-521010-PBEN-0000-221	Unemployment Compensation	4	4	8
141-1-221-0183-6-71200-521210-PBEN-0000-221	Medicare	273	256	529
141-1-221-0183-6-71200-529910-PBEN-0000-221	Long Term Disability	32	32	64
141-1-221-0183-6-71200-529930-PBEN-0000-221	Short Term Disability	35	35	70
	<b>Total 71200 - Special Education Instruction - Rivermont DLP</b>	<b>26,160</b>	<b>24,762</b>	<b>- 50,922</b>
<b>Orchard Knob Elementary</b>				
141-1-221-0194-6-71200-5116P0-PBEN-0000-221	Teacher - DLP (.6 FTE)	17,649	16,450	34,099
141-1-221-0194-6-71200-520110-PBEN-0000-221	Social Security	1,094	1,020	2,114
141-1-221-0194-6-71200-520410-PBEN-0000-221	State Retirement	1,588	1,481	3,069
141-1-221-0194-6-71200-520610-PBEN-0000-221	Life Insurance	12	12	24
141-1-221-0194-6-71200-520710-PBEN-0000-221	Health Insurance	3,996	3,996	7,992
141-1-221-0194-6-71200-520810-PBEN-0000-221	Dental Insurance	98	97	195
141-1-221-0194-6-71200-521010-PBEN-0000-221	Unemployment Compensation	4	4	8
141-1-221-0194-6-71200-521210-PBEN-0000-221	Medicare	256	238	494
141-1-221-0194-6-71200-529910-PBEN-0000-221	Long Term Disability	32	32	64
141-1-221-0194-6-71200-529930-PBEN-0000-221	Short Term Disability	35	35	70
	<b>Total 71200 - Special Education Instruction - Orchard Knob DLP</b>	<b>24,764</b>	<b>23,365</b>	<b>- 48,129</b>
<b>Snow Hill Elementary</b>				
141-1-221-0215-6-71200-5116P0-PBEN-0000-221	Teacher - DLP (.6 FTE)	23,637	22,437	46,074
141-1-221-0215-6-71200-520110-PBEN-0000-221	Social Security	1,466	1,391	2,857
141-1-221-0215-6-71200-520410-PBEN-0000-221	State Retirement	2,127	2,020	4,147
141-1-221-0215-6-71200-520610-PBEN-0000-221	Life Insurance	12	12	24
141-1-221-0215-6-71200-520710-PBEN-0000-221	Health Insurance	3,996	3,996	7,992
141-1-221-0215-6-71200-520810-PBEN-0000-221	Dental Insurance	98	97	195
141-1-221-0215-6-71200-521010-PBEN-0000-221	Unemployment Compensation	4	4	8
141-1-221-0215-6-71200-521210-PBEN-0000-221	Medicare	343	325	668
141-1-221-0215-6-71200-529910-PBEN-0000-221	Long Term Disability	32	32	64
141-1-221-0215-6-71200-529930-PBEN-0000-221	Short Term Disability	35	35	70
	<b>Total 71200 - Special Education Instruction - Snow Hill DLP</b>	<b>31,750</b>	<b>30,349</b>	<b>- 62,099</b>
<b>Soddy Elementary</b>				
141-1-221-0230-6-71200-5116P0-PBEN-0000-221	Teacher - DLP (.6 FTE)	23,903	22,703	46,606
141-1-221-0230-6-71200-520110-PBEN-0000-221	Social Security	1,482	1,408	2,890
141-1-221-0230-6-71200-520410-PBEN-0000-221	State Retirement	2,151	2,044	4,195
141-1-221-0230-6-71200-520610-PBEN-0000-221	Life Insurance	12	12	24
141-1-221-0230-6-71200-520710-PBEN-0000-221	Health Insurance	3,996	3,996	7,992
141-1-221-0230-6-71200-520810-PBEN-0000-221	Dental Insurance	98	97	195
141-1-221-0230-6-71200-521010-PBEN-0000-221	Unemployment Compensation	4	4	8
141-1-221-0230-6-71200-521210-PBEN-0000-221	Medicare	347	329	676
141-1-221-0230-6-71200-529910-PBEN-0000-221	Long Term Disability	32	32	64
141-1-221-0230-6-71200-529930-PBEN-0000-221	Short Term Disability	35	35	70
	<b>Total 71200 - Special Education Instruction - Soddy DLP</b>	<b>32,060</b>	<b>30,660</b>	<b>- 62,720</b>
<b>Spring Creek Elementary</b>				
141-1-221-0235-6-71200-5116P0-PBEN-0000-221	Teacher - DLP (.6 FTE)	18,448	17,247	35,695
141-1-221-0235-6-71200-520110-PBEN-0000-221	Social Security	1,144	1,069	2,213
141-1-221-0235-6-71200-520410-PBEN-0000-221	State Retirement	1,660	1,553	3,213
141-1-221-0235-6-71200-520610-PBEN-0000-221	Life Insurance	12	12	24
141-1-221-0235-6-71200-520710-PBEN-0000-221	Health Insurance	3,996	3,996	7,992
141-1-221-0235-6-71200-520810-PBEN-0000-221	Dental Insurance	98	97	195
141-1-221-0235-6-71200-521010-PBEN-0000-221	Unemployment Compensation	4	4	8
141-1-221-0235-6-71200-521210-PBEN-0000-221	Medicare	267	251	518
141-1-221-0235-6-71200-529910-PBEN-0000-221	Long Term Disability	32	32	64
141-1-221-0235-6-71200-529930-PBEN-0000-221	Short Term Disability	35	35	70
	<b>Total 71200 - Special Education Instruction - Spring Creek DLP</b>	<b>25,696</b>	<b>24,296</b>	<b>- 49,992</b>

ACCOUNT CODE	DESCRIPTION	FY2026			AMENDED
		BUDGET	INCREASE	DECREASE	BUDGET
		DOCUMENT			10/9/2025
<b>Westview Elementary</b>					
141-1-221-0265-6-71200-5116P0-PBEN-0000-221	Teacher - DLP (.6 FTE)	23,105	21,905		45,010
141-1-221-0265-6-71200-520110-PBEN-0000-221	Social Security	1,433	1,358		2,791
141-1-221-0265-6-71200-520410-PBEN-0000-221	State Retirement	2,079	1,972		4,051
141-1-221-0265-6-71200-520610-PBEN-0000-221	Life Insurance	12	12		24
141-1-221-0265-6-71200-520710-PBEN-0000-221	Health Insurance	3,996	3,996		7,992
141-1-221-0265-6-71200-520810-PBEN-0000-221	Dental Insurance	98	97		195
141-1-221-0265-6-71200-521010-PBEN-0000-221	Unemployment Compensation	4	4		8
141-1-221-0265-6-71200-521210-PBEN-0000-221	Medicare	335	318		653
141-1-221-0265-6-71200-529910-PBEN-0000-221	Long Term Disability	32	32		64
141-1-221-0265-6-71200-529930-PBEN-0000-221	Short Term Disability	35	35		70
	<b>Total 71200 - Special Education Instruction - Westview DLP</b>	<b>31,129</b>	<b>29,729</b>	<b>-</b>	<b>60,858</b>
<b>Districtwide Initiatives</b>					
141-1-221-6000-6-71200-542910-0000-0000-221	Instructional Supplies	19,650	8,575		28,225
	<b>Total 71200 - Special Education Instruction - Districtwide DLP</b>	<b>19,650</b>	<b>8,575</b>	<b>-</b>	<b>28,225</b>
	<b>Total 71200 Special Education Instruction DLP (PreK Programs)</b>	<b>675,000</b>	<b>296,170</b>	<b>(4,522)</b>	<b>966,648</b>
	<b>TOTAL BUDGET</b>	<b>675,000</b>	<b>296,170</b>	<b>(4,522)</b>	<b>966,648</b>

**HAMILTON COUNTY DEPARTMENT OF EDUCATION  
 SELF-FUNDED PROGRAMS  
 ACCELERATE LEARNING  
 BUDGET FISCAL YEAR 2025-2026**  
 FY26 award is \$75,000.00  
 FY25 carryover is \$23,032.85

**SOURCE OF FUNDS SUMMARY**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET		AMENDED BUDGET	
		9/18/2025	INCREASE	DECREASE	10/9/2025
141-5-414-0000-0-00000-445700-0000-0000-414	Contributions and Gifts	75,000	-	-	75,000
141-5-414-0000-0-00000-4T4555-0000-0000-414	Restricted for Education	23,033	-	-	23,033
	<b>Total Source of Funds</b>	<b>98,033</b>	<b>-</b>	<b>-</b>	<b>98,033</b>

**USE OF FUNDS SUMMARY**

<b>71100</b>	Regular Instruction	61,346	36	(3,690)	57,692
<b>72210</b>	Instructional Support	15,335	3,654	-	18,989
<b>72710</b>	Transportation	16,450	-	-	16,450
<b>99100</b>	Indirect Costs	4,902	-	-	4,902
	<b>Total Use of Funds</b>	<b>98,033</b>	<b>3,690</b>	<b>(3,690)</b>	<b>98,033</b>

**USE OF FUNDS DETAIL**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET		AMENDED BUDGET	
		9/18/2025	INCREASE	DECREASE	10/9/2025
<b><u>District Office</u></b>					
141-5-414-0000-0-72210-514090-0000-0000-414	Stipends	3,200	4,420	-	7,620
141-5-414-0000-0-72210-518990-PWOB-0000-414	Intern (FTE .5)	4,500	-	-	4,500
141-5-414-0000-0-72210-520110-0000-0000-414	Social Security	199	(189)	-	10
141-5-414-0000-0-72210-520110-PWOB-0000-414	Social Security	288	-	-	288
141-5-414-0000-0-72210-520410-0000-0000-414	State Retirement	470	(470)	-	-
141-5-414-0000-0-72210-520770-PWOB-0000-414	Medical Insurance	250	-	-	250
141-5-414-0000-0-72210-521210-0000-0000-414	Medicare	46	(43)	-	3
141-5-414-0000-0-72210-521210-PWOB-0000-414	Medicare	68	-	-	68
141-5-414-0000-0-72210-521710-0000-0000-414	State Retirement Hybrid	64	(64)	-	-
141-5-414-0000-0-72210-552410-0000-0000-414	In Service/Staff Development	4,750	-	-	4,750
141-5-414-0000-0-72210-559990-0000-0000-414	Other Charges	1,500	-	-	1,500
	<b>Total 72210 - Regular Instructional Support</b>	<b>15,335</b>	<b>3,654</b>	<b>-</b>	<b>18,989</b>
141-5-414-0000-0-99100-550410-0000-0000-414	Indirect Cost (5%)	4,902	-	-	4,902
	<b>Total 99100 - Indirect Cost</b>	<b>4,902</b>	<b>-</b>	<b>-</b>	<b>4,902</b>
	<b>Total - District Office</b>	<b>20,237</b>	<b>3,654</b>	<b>-</b>	<b>23,891</b>
<b><u>School-Based System Wide</u></b>					
141-5-414-6000-0-71100-542910-0000-0000-414	Instructional Supplies	-	36	-	36
	<b>Total - School-Based System Wide</b>	<b>-</b>	<b>36</b>	<b>-</b>	<b>36</b>
<b><u>Allen Elementary</u></b>					
141-5-414-0005-1-71100-518990-PWOB-0000-414	Impact Tutors (3 FTE)	5,351	-	(527)	4,824
141-5-414-0005-1-71100-520770-PWOB-0000-414	Medical Insurance	1,200	-	-	1,200
	<b>Total - Allen Elementary</b>	<b>6,551</b>	<b>-</b>	<b>(527)</b>	<b>6,024</b>
<b><u>Bess. T Shepherd Elementary</u></b>					
141-5-414-0017-1-71100-518990-PWOB-0000-414	Impact Tutors (5 FTE)	8,051	-	(527)	7,524
141-5-414-0017-1-71100-520770-PWOB-0000-414	Medical Insurance	2,000	-	-	2,000
	<b>Total - Bess T. Shepherd Elementary</b>	<b>10,051</b>	<b>-</b>	<b>(527)</b>	<b>9,524</b>
<b><u>Chattanooga School for Arts &amp; Sciences-Lower</u></b>					
141-5-414-0047-1-71100-518990-PWOB-0000-414	Impact Tutors (7.5 FTE)	9,462	-	(527)	8,935
141-5-414-0047-1-71100-520770-PWOB-0000-414	Medical Insurance	3,400	-	-	3,400
	<b>Total - CSAS Lower</b>	<b>12,862</b>	<b>-</b>	<b>(527)</b>	<b>12,335</b>
<b><u>Daisy Elementary</u></b>					
141-5-414-0050-1-71100-518990-PWOB-0000-414	Impact Tutors (3 FTE)	5,352	-	(527)	4,825
141-5-414-0050-1-71100-520770-PWOB-0000-414	Medical Insurance	1,200	-	-	1,200
	<b>Total - Daisy Elementary</b>	<b>6,552</b>	<b>-</b>	<b>(527)</b>	<b>6,025</b>
<b><u>East Ridge Elementary</u></b>					
141-5-414-0065-1-71100-518990-PWOB-0000-414	Impact Tutors (6.5 FTE)	5,396	-	(527)	4,869
141-5-414-0065-1-71100-520770-PWOB-0000-414	Medical Insurance	2,600	-	-	2,600
	<b>Total - East Ridge Elementary</b>	<b>7,996</b>	<b>-</b>	<b>(527)</b>	<b>7,469</b>

**Harrison Elementary**

141-5-414-0090-1-71100-518990-PWOB-0000-414	Impact Tutors (7 FTE)	11,172	(528)	10,644
141-5-414-0090-1-71100-520770-PWOB-0000-414	Medical Insurance	2,800		2,800
	<b>Total 71100 - Regular Instruction</b>	<b>13,972</b>	<b>- (528)</b>	<b>13,444</b>
141-5-414-0090-1-72710-531410-0000-0000-414	Contracts w/ Public Carriers	16,450		16,450
	<b>Total 72710 - Transportation</b>	<b>16,450</b>	<b>- -</b>	<b>16,450</b>
	<b>Total - Harrison Elementary</b>	<b>30,422</b>	<b>- (528)</b>	<b>29,894</b>

**Woodmore Elementary**

141-5-414-0245-1-71100-518990-PWOB-0000-414	Impact Tutors (2 FTE)	2,562	(527)	2,035
141-5-414-0245-1-71100-520770-PWOB-0000-414	Medical Insurance	800		800
	<b>Total - Woodmore Elementary</b>	<b>3,362</b>	<b>- (527)</b>	<b>2,835</b>
	<b>Total - Schools</b>	<b>77,796</b>	<b>- (3,690)</b>	<b>74,106</b>
	<b>TOTAL BUDGET</b>	<b>98,033</b>	<b>3,690 (3,690)</b>	<b>98,033</b>

**HAMILTON COUNTY DEPARTMENT OF EDUCATION  
 SELF-FUNDED PROGRAMS  
 HAMILTON COUNTY GOVERNMENT FUNDS  
 BUDGET FISCAL YEAR 2025-2026**

**SOURCE OF FUNDS SUMMARY**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET		
		9/18/2025	INCREASE	DECREASE
141-5-435-0000-0-00000-481300-0000-0000-435	Other Government Contributions	44,181,970	3,210,158	47,392,128
	<b>Total Source of Funds</b>	<b>44,181,970</b>	<b>3,210,158</b>	<b>- 47,392,128</b>

**USE OF FUNDS SUMMARY**

76100	Capital Outlay	44,181,970	3,391,168	(181,010)	47,392,128
	<b>Total Use of Funds</b>	<b>44,181,970</b>	<b>3,391,168</b>	<b>(181,010)</b>	<b>47,392,128</b>

**USE OF FUNDS DETAIL**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET		
		9/18/2025	INCREASE	DECREASE
<b>Deferred Maintenance</b>				
<b>District 1</b>				
141-5-435-0196-4-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -Sequoyah Roof	1,681,708	603,012	2,284,720
141-5-435-0196-4-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -Sequoyah Fans	50,000		50,000
141-5-435-0190-4-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -Sale Creek Bleachers	55,019		55,019
141-5-435-0220-3-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -SDHS Security	39,336	536	39,872
141-5-435-0220-3-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -SDHS Brick Repair	874,316	137,138	1,011,454
141-5-435-0147-1-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -NHES Roof	728,755		728,755
141-5-435-0050-1-76100-570710-0000-1201-A09	Building Improvementst - Ed Cap -Daisy Elem-Fire Alarm	100,000		100,000
141-5-435-0230-1-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -Soddy Elem-Auditorium Roof	102,000		102,000
141-5-435-0220-3-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -Soddy Daisy High-JROTC Roof	59,000		59,000
141-5-435-0220-3-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -Soddy Daisy High - Weight Room Renovation	120,657		120,657
141-5-435-0147-1-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -North Hamilton Co Elem - Water Heaters	25,000	2,362	27,362
141-5-435-0190-4-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -Sale Creek Gym Locker Reno	300,000		300,000
141-5-435-0220-3-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -SDHS Old Gym Air Conditioning	350,000		350,000
141-5-435-0147-1-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -North Hamilton Co Elem - Chiller	300,000		300,000
	<b>Total 76100 - Capital Outlay - District 1</b>	<b>4,785,791</b>	<b>743,048</b>	<b>- 5,528,839</b>
<b>District 2</b>				
141-5-435-0171-1-76100-570710-0000-1202-A09	Building Improvements - Ed Cap -RBE-Partial Roof	120,000		(76,614)
141-5-435-0240-1-76100-570710-0000-1202-A09	Building Improvements - Ed Cap -Thrasher-Chiller	177,000		177,000
141-5-435-0210-4-76100-570710-0000-1202-A09	Building Improvements - Ed Cap -SMMHS Turf Field	560	876,384	876,944
	<b>Total 76100 - Capital Outlay - District 2</b>	<b>297,560</b>	<b>876,384</b>	<b>(76,614) 1,097,330</b>
<b>District 3</b>				
141-5-435-0128-3-76100-570710-0000-1203-A09	Building Improvements - Ed Cap -Hixson High-Chiller	150,000		150,000
141-5-435-0019-1-76100-570710-0000-1203-A09	Building Improvements - Ed Cap -Big Ridge-Chiller	157,000		157,000
141-5-435-0128-3-76100-570710-0000-1203-A09	Building Improvements - Ed Cap -Hixson High - Vocational Rooftop Units	115,000		115,000
141-5-435-0120-2-76100-570710-0000-1203-A09	Building Improvements - Ed Cap -Loftis Middle-Chiller	380,000		380,000
141-5-435-0120-2-76100-570710-0000-1203-A09	Building Improvements - Ed Cap - Loftis Middle-Lobby/Clear Story Windows	36,000		36,000
141-5-435-0051-1-76100-570710-0000-1203-A09	Building Improvements - Ed Cap - McConnell Elem	2,000,000		2,000,000
141-5-435-0128-3-76100-570710-0000-1203-A09	Building Improvements - Ed Cap -Hixson High - Turf Football Field	1,000,000		1,000,000
	<b>Total 76100 - Capital Outlay - District 3</b>	<b>3,838,000</b>	<b>-</b>	<b>- 3,838,000</b>
<b>District 4</b>				
141-5-435-0046-4-76100-570710-0000-1204-A09	Building Improvements - Ed Cap -CSAS Auditorium Roof	120,000		120,000
141-5-435-0200-2-76100-570710-0000-1204-A09	Building Improvements - Ed Cap -OKMS Bleachers	-		-
141-5-435-0200-2-76100-570710-0000-1204-A09	Building Improvements - Ed Cap -OKMS HVAC	6,000,000		6,000,000
141-5-435-0046-4-76100-570710-0000-1204-A09	Building Improvements - Ed Cap -CSAS - Lower - Elementary Roof	62,000		62,000
141-5-435-0000-0-76100-570710-0000-1204-A09	Building Improvements - Ed Cap -Hillcrest Center-Security Entrance	30,000		30,000
141-5-435-0110-1-76100-570710-0000-1204-A09	Building Improvements - Ed Cap - Hardy Elem Playground	250,000		250,000
	Building Improvements - Ed Cap - FRFRC (Gateway) Stormwater Landscape	13,500		13,500
141-5-435-0046-4-76100-570710-0000-1204-A09	Building Improvements - Ed Cap -CSAS Stadium/Turf	4,500,000		4,500,000
141-5-435-0200-2-76100-570710-0000-1204-A09	Building Improvements - Ed Cap -OKMS Sand Gym Floor	37,000		37,000
	Building Improvements - Ed Cap - FRFRC (Gateway) CTE Expo Area	300,000		300,000
	<b>Total 76100 - Capital Outlay - District 4</b>	<b>11,312,500</b>	<b>-</b>	<b>- 11,312,500</b>
<b>District 5</b>				
141-5-435-0245-1-76100-570710-0000-1205-A09	Building Improvements - Ed Cap -Woodmore Shingle Roof	95,000		95,000
141-5-435-0245-1-76100-570710-0000-1205-A09	Building Improvements - Ed Cap -Woodmore-Boiler	200,000		200,000
141-5-435-0245-1-76100-570710-0000-1205-A09	Building Improvements - Ed Cap - Woodmore Elem - Brown Modified Roof	60,000		60,000
141-5-435-7056-7-76100-570710-0000-1205-A09	Building Improvements - Ed Cap -Dawn Program-Fencing	19,541		(8) 19,533
141-5-435-0245-1-76100-570710-0000-1205-A09	Building Improvements - Ed Cap -Woodmore-Playground Upgrade	250,000		250,000
141-5-435-0055-2-76100-570710-0000-1205-A09	Building Improvements - Ed Cap -Dalewood Reroof Pods-Gym	2,500,000		2,500,000
	<b>Total 76100 - Capital Outlay - District 5</b>	<b>3,124,541</b>	<b>-</b>	<b>(8) 3,124,533</b>
<b>District 6</b>				
141-5-435-0041-4-76100-570710-0000-1206-A09	Building Improvements - Ed Cap -NPMMS Fencing	111,050	38,950	150,000
141-5-435-0041-4-76100-570710-0000-1206-A09	Building Improvements - Ed Cap -NPMMS Fire Alarm	1,986		1,986
141-5-435-0175-3-76100-570710-0000-1206-A09	Building Improvements - Ed Cap - RBHS Renovation	22,409	28,965	51,374
141-5-435-0175-3-76100-570710-0000-1206-A09	Building Improvements - Ed Cap -RBHS Elevator	567	4,550	5,117
141-5-435-0045-4-76100-570710-0000-1206-A09	Building Improvements - Ed Cap -CCA Theatre Seating	243,043		243,043
141-5-435-0041-4-76100-570710-0000-1206-A09	Building Improvements - Ed Cap -NPMMS Elevator	737		737
141-5-435-0041-4-76100-570710-0000-1206-A09	Building Improvements - Ed Cap -NPMMS Windows	530,000		530,000
141-5-435-0045-4-76100-570710-0000-1206-A09	Building Improvements - Ed Cap -CCA Stage Wall	300,000		300,000
141-5-435-0175-3-76100-570710-0000-1206-A09	Building Improvements - Ed Cap - RBHS Replace Gym Floor	300,000		300,000
141-5-435-0175-3-76100-570710-0000-1206-A09	Building Improvements - Ed Cap - RBHS Replace Gym Hallway Roof	100,000		100,000
141-5-435-0041-4-76100-570710-0000-1206-A09	Building Improvements - Ed Cap -NPMMS Gym Units	170,000		170,000
	<b>Total 76100 - Capital Outlay - District 6</b>	<b>1,779,792</b>	<b>72,465</b>	<b>- 1,852,257</b>

**District 7**

141-5-435-0059-3-76100-570710-0000-1207-A09	Building Improvements - Ed Cap - EHHS Parking Lot	72		72
141-5-435-0059-3-76100-570710-0000-1207-A09	Building Improvements - Ed Cap -EHHS Stadium/Turf	18,451	656,536	674,987
141-5-435-0059-3-76100-570710-0000-1207-A09	Building Improvements - Ed Cap - EHHS Stair Treads	15,000		15,000
141-5-435-0265-1-76100-539990-0000-1207-A09	Building Improvements - Ed Cap - Westview - Chiller	300,000		300,000
141-5-435-0265-1-76100-533510-0000-1207-A09	Building Improvements - Ed Cap - Westview - Paving	100,000		100,000
<b>Total 76100 - Capital Outlay - District 7</b>		<b>433,523</b>	<b>656,536</b>	<b>- 1,090,059</b>

**District 8**

141-5-435-0070-3-76100-570710-0000-1208-A09	Building Improvements - Ed Cap - ERHS Ceiling Demo	750,000		750,000
141-5-435-0070-3-76100-570710-0000-1208-A09	Building Improvements - Ed Cap - ERHS Softball Field	364,139	500	364,639
141-5-435-0070-3-76100-539990-0000-1208-A09	Other Contracted Services - ERHS Gym Floor/Paint	44,165		44,165
141-5-435-0235-1-76100-570710-0000-1208-A09	Building Improvements - Ed Cap - Spring Creek-Fire Alarm	72,000	40,000	112,000
141-5-435-0070-3-76100-570710-0000-1208-A09	Building Improvements - Ed Cap - ERHS Gym Roof	112,000	(40,000)	72,000
<b>Total 76100 - Capital Outlay - District 8</b>		<b>1,342,304</b>	<b>40,500</b>	<b>(40,000) 1,342,804</b>

**District 9**

141-5-435-0100-2-76100-570710-0000-1209-A09	Building Improvements - Ed Cap - Hunter Baseball Fld	161,725		161,725
141-5-435-0040-3-76100-570710-0000-1209-A09	Building Improvements - Ed Cap - Central Bleachers	500,000		500,000
141-5-435-0040-3-76100-570710-0000-1209-A09	Building Improvements - Ed Cap - Central Rooftop Units	3,199,774		3,199,774
141-5-435-0215-1-76100-570710-0000-1209-A09	Building Improvements - Ed Cap - Snow Hill Chiller	237,012	7,988	245,000
141-5-435-0215-1-76100-570710-0000-1209-A09	Building Improvements - Ed Cap - Snow Hill Roof/Addit	1,289,180	(7,988)	1,281,192
141-5-435-0040-3-76100-570710-0000-1209-A09	Building Improvements - Ed Cap - Central - Turf	1,000,000		1,000,000
141-5-435-0040-3-76100-570710-0000-1209-A09	Building Improvements - Ed Cap - Central Front Office Renovation	40,000		40,000
141-5-435-0100-2-76100-570710-0000-1209-A09	Building Improvements - Ed Cap - Hunter Athletic Field ADA	150,000		150,000
<b>Total 76100 - Capital Outlay - District 9</b>		<b>6,577,691</b>	<b>7,988</b>	<b>(7,988) 6,577,691</b>

**District 10**

141-5-435-0160-3-76100-570710-0000-1210-A09	Building Improvements - Ed Cap - OHS Chiller	70,000		70,000
141-5-435-0137-3-76100-570710-0000-1210-A09	Building Improvements - Ed Cap - OHS Track	75,803	288,137	363,940
141-5-435-0017-1-76100-570710-0000-1210-A09	Building Improvements - Ed Cap - BTES Roof	248,466	(6,400)	242,066
141-5-435-0017-1-76100-570710-0000-1210-A09	Building Improvements - Ed Cap - BTES Controls	7,050		7,050
141-5-435-0260-1-76100-570710-0000-1210-A09	Building Improvements - Ed Cap - Wallace Smith Controls	450,000		450,000
141-5-435-0100-2-76100-570710-0000-1210-A09	Building Improvements - Ed Cap - Hunter Mid Controls	725,000		725,000
141-5-435-0157-2-76100-570710-0000-1210-A09	Building Improvements - Ed Cap - Ooltewah Mid-Roof	430,000		430,000
141-5-435-0160-3-76100-570710-0000-1210-A09	Building Improvements - Ed Cap - OHS Soccer RR	300,000		300,000
<b>Total 76100 - Capital Outlay - District 10</b>		<b>2,306,319</b>	<b>288,137</b>	<b>(6,400) 2,588,056</b>

**District 11**

141-5-435-0064-2-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - ELA EPDM Roof	740,925		740,925
141-5-435-0137-3-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - Howard High-Settling	492,750		492,750
141-5-435-0125-1-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - Lkt Mtn Cafeteria Roof	271,515	22,077	293,592
141-5-435-0125-1-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - Lkt Mtn Controls	2,750		2,750
141-5-435-0165-4-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - LVMHS Wallpacks	1,434,722	10,880	1,445,602
141-5-435-0241-1-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - LVE Roof,Ceiling	902,397		902,397
141-5-435-0241-1-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - LVE Restrooms	90,000		90,000
141-5-435-0037-1-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - Donaldson Roof	67,000		67,000
141-5-435-0063-1-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - East Lake Ele Chiller	220,000		220,000
141-5-435-0063-1-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - East Lake Ele Water Heater	29,734		29,734
141-5-435-0016-1-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - Battle Academy Office Remodel	15,000		15,000
141-5-435-0125-1-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - Lkt Mtn Elevator	100,000		100,000
<b>Total 76100 - Capital Outlay - District 11</b>		<b>4,366,793</b>	<b>32,957</b>	<b>- 4,399,750</b>

**District Projects**

141-5-435-0000-0-76100-570710-0000-1212-A09	Building Improvements - Ed Cap - Service Center Roof	359,170	528,069	887,239
141-5-435-0000-0-76100-539990-0000-1212-A09	Other Contracted Services - CSLA/Dawn Demo	709,757	56,310	766,067
141-5-435-6000-0-76100-539990-0000-1212-A09	Other Contracted Services - System Wide Painting	878,229	38,774	917,003
141-5-435-6000-0-76100-570710-0000-1212-A09	Building Improvements - Ed Cap - System Wide Alarms	50,000		50,000
141-5-435-6000-0-76100-539990-0000-1212-A09	Other Contracted Services - Flooring System Wide	100,000	50,000	150,000
141-5-435-6000-0-76100-539990-0000-1212-A09	Other Contracted Services - Asbestos Abatement-System	150,000	(50,000)	100,000
141-5-435-6000-0-76100-570710-0000-1212-A09	Building Improvement - Ed Cap Playground Safety System wide	150,000		150,000
141-5-435-6000-0-76100-570710-0000-1212-A09	Building Improvement - Ed Cap HVAC System wide	150,000		150,000
141-5-435-6000-0-76100-570710-0000-1212-A09	Building Improvement - Ed Cap Marker Boards System wide	50,000		50,000
141-5-435-6000-0-76100-570710-0000-1212-A09	Building Improvement - Ed Cap Fencing System wide	150,000		150,000
141-5-435-6000-0-76100-570710-0000-1212-A09	Building Improvement - Ed Cap Fire Code Upgrades System wide	100,000		100,000
141-5-435-6000-0-76100-570710-0000-1212-A09	Building Improvement - Ed Cap Wood Exterior Doors	200,000		200,000
141-5-435-0000-0-76100-533510-0000-1212-A09	Maintenance & Repairs Bldgs - Paving	300,000		300,000
141-5-435-0000-0-76100-533610-0000-1212-A09	Maintenance & Repairs Services- IT ( Paging System upgrades)	200,000		200,000
141-5-435-0000-0-76100-570710-0000-1212-A09	Building Improvement - Ed Cap Door Locks	200,000		200,000
141-5-435-0000-0-76100-570710-0000-1212-A09	Building Improvement - Ed Cap Central Office Bldg 228 RTU	20,000		20,000
141-5-435-0000-0-76100-570710-0000-1212-A09	Building Improvement - Ed Cap Central Office Remaining Roofs	250,000		250,000
<b>Total 76100 - Capital Outlay - District Wide</b>		<b>4,017,156</b>	<b>673,153</b>	<b>(50,000) 4,640,309</b>

**Total Deferred Maintenance Phase 1**

<b>44,181,970</b>	<b>3,391,168</b>	<b>(181,010)</b>	<b>47,392,128</b>
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**TOTAL BUDGET**

<b>44,181,970</b>	<b>3,391,168</b>	<b>(181,010)</b>	<b>47,392,128</b>
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**HAMILTON COUNTY DEPARTMENT OF EDUCATION  
 SELF-FUNDED PROGRAMS  
 FUTURE READY INSTITUTES - HIXSON HIGH  
 BUDGET FISCAL YEAR 2025-2026**

**SOURCE OF FUNDS**

<u>ACCOUNT CODE</u>	<u>DESCRIPTION</u>	<u>AMENDED BUDGET</u>			<u>AMENDED BUDGET</u>
		<u>9/18/2025</u>	<u>INCREASE</u>	<u>DECREASE</u>	<u>10/9/2025</u>
141-5-437-0000-0-00000-445700-0000-0000	Contributions and Gifts	38,000			38,000
141-5-437-0000-0-00000-4T4555-0000-0000	Restricted for Education	48,559			48,559
	<b>Total Source of Funds</b>	<b>86,559</b>	<b>-</b>	<b>-</b>	<b>86,559</b>

**USE OF FUNDS SUMMARY**

		<u>AMENDED BUDGET</u>			<u>AMENDED BUDGET</u>
		<u>9/18/2025</u>	<u>INCREASE</u>	<u>DECREASE</u>	<u>10/9/2025</u>
<b>71100</b>	Regular Instruction	26,359	-	(5,000)	21,359
<b>71300</b>	Vocational Education Instruction	23,200	5,000	-	28,200
<b>72130</b>	Other Student Support	10,000	-	-	10,000
<b>72710</b>	Transportation	12,000	-	-	12,000
<b>76100</b>	Regular Capital Outlay	15,000	-	-	15,000
	<b>Total Use of Funds</b>	<b>86,559</b>	<b>5,000</b>	<b>(5,000)</b>	<b>86,559</b>

**USE OF FUNDS DETAIL**

<u>ACCOUNT CODE</u>	<u>DESCRIPTION</u>	<u>AMENDED BUDGET</u>			<u>AMENDED BUDGET</u>
		<u>9/18/2025</u>	<u>INCREASE</u>	<u>DECREASE</u>	<u>10/9/2025</u>
141-5-437-0128-3-71100-542910-0000-0000	Instructional Materials	2,659			2,659
141-5-437-0128-3-71100-547110-0000-0000	Software	6,200			6,200
141-5-437-0128-3-71100-572210-0000-0000	Equipment - Regular Instruction	17,500		(5,000)	12,500
	<b>Total 71100 - Regular Instruction</b>	<b>26,359</b>	<b>-</b>	<b>(5,000)</b>	<b>21,359</b>
141-5-437-0128-3-71300-518990-PWOB-0000	Other Salaries	12,262			12,262
141-5-437-0128-3-71300-520110-PWOB-0000	Social Security	760			760
141-5-437-0128-3-71300-521210-PWOB-0000	Employer Medicare	178			178
141-5-437-0128-3-71300-559990-0000-0000	Other Charges	10,000	5,000		15,000
	<b>Total 71300 - Vocational Education Instruction</b>	<b>23,200</b>	<b>5,000</b>	<b>-</b>	<b>28,200</b>
141-5-437-0128-3-72130-552410-0000-0000	In Service/Staff Development	10,000			10,000
	<b>Total 72130 - Other Student Support</b>	<b>10,000</b>	<b>-</b>	<b>-</b>	<b>10,000</b>
141-5-437-0128-3-72710-531410-0000-0000	Contracts w/ Public Carriers	12,000			12,000
	<b>Total 72710 - Transportation</b>	<b>12,000</b>	<b>-</b>	<b>-</b>	<b>12,000</b>
141-5-437-0128-3-76100-570710-0000-0000	Building Improvements	15,000			15,000
	<b>Total 76100 - Regular Capital Outlay</b>	<b>15,000</b>	<b>-</b>	<b>-</b>	<b>15,000</b>
	<b>TOTAL BUDGET</b>	<b>86,559</b>	<b>5,000</b>	<b>(5,000)</b>	<b>86,559</b>

**HAMILTON COUNTY DEPARTMENT OF EDUCATION  
 SELF-FUNDED PROGRAMS  
 HCS FOUNDATION  
 BUDGET FISCAL YEAR 2025-2026**

**SOURCE OF FUNDS SUMMARY**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET		AMENDED BUDGET	
		7/17/2025	INCREASE	DECREASE	10/9/2025
141-5-497-0000-0-00000-445700-0000-0000	Contributions & Gifts	405,030			405,030
141-5-497-0000-0-00000-4T4555-0000-0000	Restricted for Education	19,295	795		20,090
	<b>Total Source of Funds</b>	<b>424,325</b>	<b>795</b>	<b>-</b>	<b>425,120</b>

**USE OF FUNDS SUMMARY**

<b>71100</b>	Regular Instruction	100,000	-	-	100,000
<b>72210</b>	Instructional Support	324,325	15,495	(14,700)	325,120
	<b>Total Use of Funds</b>	<b>424,325</b>	<b>15,495</b>	<b>(14,700)</b>	<b>425,120</b>

**USE OF FUNDS DETAIL**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET		AMENDED BUDGET	
		7/17/2025	INCREASE	DECREASE	10/9/2025
<b>Foundation Funded Positions</b>					
141-5-497-0000-0-72210-5189A0-PBEN-0000	Other Salaries	77,496			77,496
141-5-497-0000-0-72210-520110-PBEN-0000	Social Security	4,805			4,805
141-5-497-0000-0-72210-520410-PBEN-0000	State Retirement	6,975			6,975
141-5-497-0000-0-72210-520610-PBEN-0000	Life Insurance	40			40
141-5-497-0000-0-72210-520710-PBEN-0000	Medical Insurance	13,320			13,320
141-5-497-0000-0-72210-520810-PBEN-0000	Dental Insurance	294			294
141-5-497-0000-0-72210-521010-PBEN-0000	Unemployment	14			14
141-5-497-0000-0-72210-521210-PBEN-0000	Employer Medicare	1,124			1,124
141-5-497-0000-0-72210-521710-PBEN-0000	State Retirement Hybrid	1,550			1,550
141-5-497-0000-0-72210-529910-PBEN-0000	Other Fringe Benefits	107			107
141-5-497-0000-0-72210-529930-PBEN-0000	Short Term Disability	116			116
	<b>Total 72210 - Instructional Support</b>	<b>105,841</b>	<b>-</b>	<b>-</b>	<b>105,841</b>
	<b>Total - Foundation Funded Positions</b>	<b>105,841</b>	<b>-</b>	<b>-</b>	<b>105,841</b>
<b>Recharge Rooms</b>					
141-5-497-0000-0-72210-549990-0000-9120	Other Supplies and Materials	3,595			3,595
	<b>Total 72210 - Regular Instruction Support</b>	<b>3,595</b>	<b>-</b>	<b>-</b>	<b>3,595</b>
	<b>Total - Recharge Rooms</b>	<b>3,595</b>	<b>-</b>	<b>-</b>	<b>3,595</b>
<b>Tennessee Score-Momentum Metrics Innov Pilot</b>					
141-5-497-0000-0-72210-539990-0000-9180	Other Contracted Services	14,700		(14,700)	-
141-5-497-0000-0-72210-549990-0000-9180	Other Supplies and Materials	1,000	10,495		11,495
141-5-497-0000-0-72210-552410-0000-9180	In Service/Staff Development	-	5,000		5,000
	<b>Total 72210 - Regular Instruction Support</b>	<b>15,700</b>	<b>15,495</b>	<b>(14,700)</b>	<b>16,495</b>
	<b>Total - Tennessee Score Momentum Metrics</b>	<b>15,700</b>	<b>15,495</b>	<b>(14,700)</b>	<b>16,495</b>
<b>MacLellan Foundation Positions</b>					
141-5-497-0065-1-71100-516310-PBEN-9340	Educational Assistant-East Ridge Elem	30,000			30,000
141-5-497-0065-1-71100-520110-PBEN-9340	Social Security	1,864			1,864
141-5-497-0065-1-71100-520410-PBEN-9340	State Retirement	3,210			3,210
141-5-497-0065-1-71100-520610-PBEN-9340	Life Insurance	40			40
141-5-497-0065-1-71100-520710-PBEN-9340	Medical Insurance	13,320			13,320
141-5-497-0065-1-71100-520810-PBEN-9340	Dental Insurance	294			294
141-5-497-0065-1-71100-521010-PBEN-9340	Unemployment	14			14
141-5-497-0065-1-71100-521210-PBEN-9340	Employer Medicare	435			435
141-5-497-0065-1-71100-521710-PBEN-9340	State Retirement Hybrid	600			600
141-5-497-0065-1-71100-529910-PBEN-9340	Other Fringe Benefits	107			107
141-5-497-0065-1-71100-529930-PBEN-9340	Short Term Disability	116			116
	<b>Total 71100 - Regular Instruction - East Ridge Elem</b>	<b>50,000</b>	<b>-</b>	<b>-</b>	<b>50,000</b>
<b>MacLellan Foundation Positions</b>					
141-5-497-0078-1-71100-516310-PBEN-9340	Educational Assistant-East Side Elem	30,000			30,000
141-5-497-0078-1-71100-520110-PBEN-9340	Social Security	1,864			1,864
141-5-497-0078-1-71100-520410-PBEN-9340	State Retirement	3,210			3,210
141-5-497-0078-1-71100-520610-PBEN-9340	Life Insurance	40			40
141-5-497-0078-1-71100-520710-PBEN-9340	Medical Insurance	13,320			13,320
141-5-497-0078-1-71100-520810-PBEN-9340	Dental Insurance	294			294
141-5-497-0078-1-71100-521010-PBEN-9340	Unemployment	14			14
141-5-497-0078-1-71100-521210-PBEN-9340	Employer Medicare	435			435
141-5-497-0078-1-71100-521710-PBEN-9340	State Retirement Hybrid	600			600
141-5-497-0078-1-71100-529910-PBEN-9340	Other Fringe Benefits	107			107
141-5-497-0078-1-71100-529930-PBEN-9340	Short Term Disability	116			116
	<b>Total 71100 - Regular Instruction - East Side Elem</b>	<b>50,000</b>	<b>-</b>	<b>-</b>	<b>50,000</b>

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 7/17/2025	INCREASE	DECREASE	AMENDED BUDGET 10/9/2025
<b>MidTown Learning Community</b>					
141-5-497-6002-0-72210-517210-PBEN-0000	Coach	77,617			77,617
141-5-497-6002-0-72210-520110-PBEN-0000	Social Security	4,812			4,812
141-5-497-6002-0-72210-520410-PBEN-0000	Retirement	6,209			6,209
141-5-497-6002-0-72210-520610-PBEN-0000	Life Insurance	40			40
141-5-497-6002-0-72210-520710-PBEN-0000	Health Insurance	13,320			13,320
141-5-497-6002-0-72210-520810-PBEN-0000	Dental	294			294
141-5-497-6002-0-72210-521010-PBEN-0000	Unemployment	14			14
141-5-497-6002-0-72210-521210-PBEN-0000	Medicare	1,126			1,126
141-5-497-6002-0-72210-521710-PBEN-0000	State Retirement Hybrid	776			776
141-5-497-6002-0-72210-529910-PBEN-0000	Long Term Disability	107			107
141-5-497-6002-0-72210-529930-PBEN-0000	Short Term Disability	116			116
	<b>Total 72210 - Total Instructional Support Midtown</b>	<b>104,431</b>			<b>104,431</b>
<b>Missionary Ridge Learning Community</b>					
141-5-497-6003-0-72210-517210-PBEN-0000	Coach	69,325			69,325
141-5-497-6003-0-72210-520110-PBEN-0000	Social Security	4,298			4,298
141-5-497-6003-0-72210-520410-PBEN-0000	Retirement	5,546			5,546
141-5-497-6003-0-72210-520610-PBEN-0000	Life Insurance	40			40
141-5-497-6003-0-72210-520710-PBEN-0000	Health Insurance	13,320			13,320
141-5-497-6003-0-72210-520810-PBEN-0000	Dental	294			294
141-5-497-6003-0-72210-521010-PBEN-0000	Unemployment	14			14
141-5-497-6003-0-72210-521210-PBEN-0000	Medicare	1,005			1,005
141-5-497-6003-0-72210-521710-PBEN-0000	State Retirement Hybrid	693			693
141-5-497-6003-0-72210-529910-PBEN-0000	Long Term Disability	107			107
141-5-497-6003-0-72210-529930-PBEN-0000	Short Term Disability	116			116
	<b>Total 72210 - Total Instructional Support Missionary Ridge</b>	<b>94,758</b>			<b>94,758</b>
	<b>Total - Maclellan Funded Positions</b>	<b>299,189</b>	<b>-</b>	<b>-</b>	<b>299,189</b>
	<b>TOTAL BUDGET</b>	<b>424,325</b>	<b>15,495</b>	<b>(14,700)</b>	<b>425,120</b>

**HAMILTON COUNTY DEPARTMENT OF EDUCATION  
 SELF-FUNDED PROGRAMS  
 SCHOOL AGE CHILD CARE  
 BUDGET FISCAL YEAR 2025-2026**

**SOURCE OF FUNDS SUMMARY**

ACCOUNT CODES	DESCRIPTION	FY2026 BUDGET DOCUMENT	AMENDED BUDGET 10/9/2025
141-5-824-0000-0-00000-435810-0000-0000	Community Service Fee Day Care	3,956,973	3,956,973
141-5-824-0000-0-00000-441100-0000-0000	Interest Earned	1,000	1,000
	<b>Total Source of Funds</b>	<b>3,957,973</b>	<b>3,957,973</b>

**USE OF FUNDS SUMMARY**

<b>73300</b> Community Services	3,957,973	335,300	(335,300)	3,957,973
<b>Total Use of Funds</b>	<b>3,957,973</b>	<b>335,300</b>	<b>(335,300)</b>	<b>3,957,973</b>

**USE OF FUNDS DETAIL**

ACCOUNT CODES	DESCRIPTION	FY2026 BUDGET DOCUMENT	INCREASE	DECREASE	AMENDED BUDGET 10/9/2025
141-5-824-0000-0-73300-510510-PBEN-0000	Manager Community Service (1 FTE)	114,309	1,000		115,309
141-5-824-0000-0-73300-516210-PBEN-0000	Clerical Personnel - Community Service (5 FTE)	313,756	3,000		316,756
141-5-824-0000-0-73300-518810-0000-0000	Bonus Pay	-	12,000		12,000
141-5-824-0000-0-73300-520110-0000-0000	Social Security	-	744		744
141-5-824-0000-0-73300-520110-PBEN-0000	Social Security	26,540	248		26,788
141-5-824-0000-0-73300-520410-0000-0000	State Retirement	-	1,623		1,623
141-5-824-0000-0-73300-520410-PBEN-0000	State Retirement	54,364	508		54,872
141-5-824-0000-0-73300-520610-PBEN-0000	Life Insurance	240			240
141-5-824-0000-0-73300-520710-PBEN-0000	Medical Insurance	79,920			79,920
141-5-824-0000-0-73300-520810-PBEN-0000	Dental Insurance	1,764			1,764
141-5-824-0000-0-73300-521010-PBEN-0000	Unemployment Compensation	84			84
141-5-824-0000-0-73300-521210-0000-0000	Employer Medicare	-	174		174
141-5-824-0000-0-73300-521210-PBEN-0000	Employer Medicare	6,207	58		6,265
141-5-824-0000-0-73300-521710-0000-0000	State Retirement Hybrid	-	28		28
141-5-824-0000-0-73300-521710-PBEN-0000	State Retirement Hybrid	8,561		(6,938)	1,623
141-5-824-0000-0-73300-529910-PBEN-0000	Long Term Disability	642			642
141-5-824-0000-0-73300-529930-PBEN-0000	Short Term Disability	696			696
141-5-824-0000-0-73300-530710-0000-0000	Telephone	6,000			6,000
141-5-824-0000-0-73300-533610-0000-0000	Maint & Repairs - Equipment	1,000			1,000
141-5-824-0000-0-73300-535510-0000-0000	Travel	10,000			10,000
141-5-824-0000-0-73300-539910-0000-0000	Copier Lease/Maint	15,000			15,000
141-5-824-0000-0-73300-539940-0000-0000	Contracted Printing	5,000			5,000
141-5-824-0000-0-73300-539990-0000-0000	Other Contracted Services	75,000			75,000
141-5-824-0000-0-73300-543510-0000-0000	Office Supplies	5,000			5,000
141-5-824-0000-0-73300-549990-0000-0000	Other Supplies And Materials	200,000			200,000
141-5-824-0000-0-73300-552410-0000-0000	In Service/Staff Development	25,000			25,000
141-5-824-0000-0-73300-559990-0000-0000	Other Charges	50,000			50,000
141-5-824-0000-0-73300-579010-0000-0000	Equipment - Other	50,000			50,000
	<b>Total - Office</b>	<b>1,049,083</b>	<b>19,383</b>	<b>(6,938)</b>	<b>1,061,528</b>
141-5-824-0005-1-73300-516910-PWOB-0000	Part-Time - No Benefits (2 FTE)	83,788		(30,000)	53,788
141-5-824-0005-1-73300-518810-0000-0000	Bonus Pay		2,000		2,000
141-5-824-0005-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	48,930		(15,000)	33,930
141-5-824-0005-1-73300-520110-0000-0000	Social Security		124		124
141-5-824-0005-1-73300-520110-PWOB-0000	Social Security	8,229		(2,790)	5,439
141-5-824-0005-1-73300-520770-PWOB-0000	Medical Insurance PT	3,250			3,250
141-5-824-0005-1-73300-521210-0000-0000	Employer Medicare		29		29
141-5-824-0005-1-73300-521210-PWOB-0000	Employer Medicare	1,924		(652)	1,272
141-5-824-0005-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0005-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Allen Elementary</b>	<b>152,121</b>	<b>2,153</b>	<b>(48,442)</b>	<b>105,832</b>
141-5-824-0010-1-73300-516910-PWOB-0000	Part-Time - No Benefits (1 FTE)	20,750			20,750
141-5-824-0010-1-73300-518810-0000-0000	Bonus Pay		2,000		2,000
141-5-824-0010-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	27,759			27,759
141-5-824-0010-1-73300-520110-0000-0000	Social Security		124		124
141-5-824-0010-1-73300-520110-PWOB-0000	Social Security	3,008			3,008
141-5-824-0010-1-73300-520770-PWOB-0000	Medical Insurance PT	1,950			1,950
141-5-824-0010-1-73300-521210-0000-0000	Employer Medicare		29		29
141-5-824-0010-1-73300-521210-PWOB-0000	Employer Medicare	703			703
141-5-824-0010-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0010-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Alpine Crest Elementary</b>	<b>60,170</b>	<b>2,153</b>	<b>-</b>	<b>62,323</b>

141-5-824-0013-1-73300-516910-PWOB-0000	Part-Time - No Benefits (1 FTE)	28,530			28,530
141-5-824-0013-1-73300-518810-0000-0000	Bonus Pay	-	2,000		2,000
141-5-824-0013-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	26,388			26,388
141-5-824-0013-1-73300-520110-0000-0000	Social Security	-	124		124
141-5-824-0013-1-73300-520110-PWOB-0000	Social Security	3,405			3,405
141-5-824-0013-1-73300-520770-PWOB-0000	Medical Insurance PT	1,950			1,950
141-5-824-0013-1-73300-521210-0000-0000	Employer Medicare	-	29		29
141-5-824-0013-1-73300-521210-PWOB-0000	Employer Medicare	796			796
141-5-824-0013-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0013-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Apison Elementary</b>	<b>67,069</b>	<b>2,153</b>	<b>-</b>	<b>69,222</b>
141-5-824-0016-1-73300-516910-PWOB-0000	Part-Time - No Benefits (3.5 FTE)	59,990			59,990
141-5-824-0016-1-73300-518810-0000-0000	Bonus Pay	-	4,000		4,000
141-5-824-0016-1-73300-518930-PBEN-0000	Site Director (1 FTE)	44,926		(5,000)	39,926
141-5-824-0016-1-73300-520110-0000-0000	Social Security	-	248		248
141-5-824-0016-1-73300-520110-PBEN-0000	Social Security	2,785		(310)	2,475
141-5-824-0016-1-73300-520110-PWOB-0000	Social Security	3,719			3,719
141-5-824-0016-1-73300-520410-0000-0000	State Retirement	-	153		153
141-5-824-0016-1-73300-520410-PBEN-0000	State Retirement	5,706		(635)	5,071
141-5-824-0016-1-73300-520610-PBEN-0000	Life Insurance	40			40
141-5-824-0016-1-73300-520710-PBEN-0000	Medical Insurance	13,320			13,320
141-5-824-0016-1-73300-520770-PWOB-0000	Medical Insurance PT	4,550			4,550
141-5-824-0016-1-73300-520810-PBEN-0000	Dental Insurance	294			294
141-5-824-0016-1-73300-521010-PBEN-0000	Unemployment Compensation	14			14
141-5-824-0016-1-73300-521210-0000-0000	Employer Medicare	-	58		58
141-5-824-0016-1-73300-521210-PBEN-0000	Employer Medicare	651		(72)	579
141-5-824-0016-1-73300-521210-PWOB-0000	Employer Medicare	870			870
141-5-824-0016-1-73300-521710-0000-0000	State Retirement Hybrid	-	27		27
141-5-824-0016-1-73300-521710-PBEN-0000	State Retirement Hybrid	899		(100)	799
141-5-824-0016-1-73300-529910-PBEN-0000	Long Term Disability	107			107
141-5-824-0016-1-73300-529930-PBEN-0000	Short Term Disability	116			116
141-5-824-0016-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0016-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Battle Academy</b>	<b>143,987</b>	<b>4,486</b>	<b>(6,117)</b>	<b>142,356</b>
141-5-824-0017-1-73300-516910-PWOB-0000	Part-Time - No Benefits (0.5 FTE)	12,866	2,000		14,866
141-5-824-0017-1-73300-518810-0000-0000	Bonus Pay	-	1,000		1,000
141-5-824-0017-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	30,940	2,000		32,940
141-5-824-0017-1-73300-520110-0000-0000	Social Security	-	62		62
141-5-824-0017-1-73300-520110-PWOB-0000	Social Security	2,716	248		2,964
141-5-824-0017-1-73300-520770-PWOB-0000	Medical Insurance PT	1,300			1,300
141-5-824-0017-1-73300-521210-0000-0000	Employer Medicare	-	15		15
141-5-824-0017-1-73300-521210-PWOB-0000	Employer Medicare	635	58		693
141-5-824-0017-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0017-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Shepherd Elementary</b>	<b>54,457</b>	<b>5,383</b>	<b>-</b>	<b>59,840</b>
141-5-824-0019-1-73300-516910-PWOB-0000	Part-Time - No Benefits (1 FTE)	46,750		(15,000)	31,750
141-5-824-0019-1-73300-518810-0000-0000	Bonus Pay	-	4,000		4,000
141-5-824-0019-1-73300-518930-PBEN-0000	Site Director (0.5 FTE)	45,734		(6,000)	39,734
141-5-824-0019-1-73300-520110-0000-0000	Social Security	-	248		248
141-5-824-0019-1-73300-520110-PBEN-0000	Social Security	2,836		(372)	2,464
141-5-824-0019-1-73300-520110-PWOB-0000	Social Security	2,899		(930)	1,969
141-5-824-0019-1-73300-520410-0000-0000	State Retirement	-	153		153
141-5-824-0019-1-73300-520410-PBEN-0000	State Retirement	5,808		(762)	5,046
141-5-824-0019-1-73300-520610-PBEN-0000	Life Insurance	40			40
141-5-824-0019-1-73300-520710-PBEN-0000	Medical Insurance	13,320			13,320
141-5-824-0019-1-73300-520770-PWOB-0000	Medical Insurance PT	1,950			1,950
141-5-824-0019-1-73300-520810-PBEN-0000	Dental Insurance	294			294
141-5-824-0019-1-73300-521010-PBEN-0000	Unemployment Compensation	14			14
141-5-824-0019-1-73300-521210-0000-0000	Employer Medicare	-	58		58
141-5-824-0019-1-73300-521210-PBEN-0000	Employer Medicare	663		(87)	576
141-5-824-0019-1-73300-521210-PWOB-0000	Employer Medicare	678		(218)	460
141-5-824-0019-1-73300-521710-0000-0000	State Retirement Hybrid	-	27		27
141-5-824-0019-1-73300-521710-PBEN-0000	State Retirement Hybrid	915		(120)	795
141-5-824-0019-1-73300-529910-PBEN-0000	Long Term Disability	107			107
141-5-824-0019-1-73300-529930-PBEN-0000	Short Term Disability	116			116
141-5-824-0019-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0019-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Big Ridge Elementary</b>	<b>128,124</b>	<b>4,486</b>	<b>(23,489)</b>	<b>109,121</b>

141-5-824-0033-1-73300-516910-PWOB-0000	Part-Time - No Benefits (1 FTE)	22,960			22,960
141-5-824-0033-1-73300-518810-0000-0000	Bonus Pay	-	3,000		3,000
141-5-824-0033-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	26,013			26,013
141-5-824-0033-1-73300-520110-0000-0000	Social Security	-	186		186
141-5-824-0033-1-73300-520110-PWOB-0000	Social Security	3,036			3,036
141-5-824-0033-1-73300-520770-PWOB-0000	Medical Insurance PT	1,950			1,950
141-5-824-0033-1-73300-521210-0000-0000	Employer Medicare	-	44		44
141-5-824-0033-1-73300-521210-PWOB-0000	Employer Medicare	710			710
141-5-824-0033-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0033-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Brown Academy</b>	<b>60,669</b>	<b>3,230</b>	<b>-</b>	<b>63,899</b>
141-5-824-0041-4-73300-516910-PWOB-0411	Part-Time - No Benefits (2 FTE)	57,752			57,752
141-5-824-0041-4-73300-518810-0000-0411	Bonus Pay	-	6,000		6,000
141-5-824-0041-4-73300-518930-PBEN-0411	Site Director (1 FTE)		59,281		59,281
141-5-824-0041-4-73300-518930-PWOB-0411	Site Director	59,281		(59,281)	-
141-5-824-0041-4-73300-520110-0000-0411	Social Security	-	372		372
141-5-824-0041-4-73300-520110-PBEN-0411	Social Security	-	3,700		3,700
141-5-824-0041-4-73300-520110-PWOB-0411	Social Security	7,256		(3,674)	3,582
141-5-824-0041-4-73300-520410-0000-0411	State Retirement		153		153
141-5-824-0041-4-73300-520410-PBEN-0411	State Retirement		7,530		7,530
141-5-824-0041-4-73300-520610-PBEN-0411	Life Insurance	-	40		40
141-5-824-0041-4-73300-520710-PBEN-0411	Medical Insurance	-	13,320		13,320
141-5-824-0041-4-73300-520770-PWOB-0411	Medical Insurance PT	3,250		(650)	2,600
141-5-824-0041-4-73300-520810-PBEN-0411	Dental Insurance	-	294		294
141-5-824-0041-4-73300-520110-PWOB-0411	Unemployment Compensation	-	14		14
141-5-824-0041-4-73300-521210-0000-0411	Employer Medicare	-	87		87
141-5-824-0041-4-73300-521210-PBEN-0411	Employer Medicare	-	860		860
141-5-824-0041-4-73300-521210-PWOB-0411	Employer Medicare	1,697		(860)	837
141-5-824-0041-4-73300-521710-0000-0411	State Retirement Hybrid	-	27		27
141-5-824-0041-4-73300-521710-PBEN-0411	State Retirement Hybrid		1,186		1,186
141-5-824-0041-4-73300-529910-PBEN-0411	Long Term Disability	-	107		107
141-5-824-0041-4-73300-529930-PBEN-0411	Short Term Disability	-	116		116
141-5-824-0041-4-73300-549990-0000-0411	Other Supplies And Materials	3,000			3,000
141-5-824-0041-4-73300-559990-0000-0411	Other Charges	3,000			3,000
	<b>Total - Normal Park Museum Magnet Lower</b>	<b>135,236</b>	<b>93,087</b>	<b>(64,465)</b>	<b>163,858</b>
141-5-824-0041-4-73300-516910-PWOB-0412	Part-Time - No Benefits (1 FTE)	30,451			30,451
141-5-824-0041-4-73300-518810-0000-0412	Bonus Pay	-	1,000		1,000
141-5-824-0041-4-73300-518930-PWOB-0412	Site Director (0.5 FTE)	18,307	7,000		25,307
141-5-824-0041-4-73300-520110-0000-0412	Social Security	-	62		62
141-5-824-0041-4-73300-520110-PWOB-0412	Social Security	3,023	434		3,457
141-5-824-0041-4-73300-520770-PWOB-0412	Medical Insurance PT	1,950			1,950
141-5-824-0041-4-73300-521210-0000-0412	Employer Medicare	-	15		15
141-5-824-0041-4-73300-521210-PWOB-0412	Employer Medicare	707	101		808
141-5-824-0041-4-73300-549990-0000-0412	Other Supplies And Materials	3,000			3,000
141-5-824-0041-4-73300-559990-0000-0412	Other Charges	3,000			3,000
	<b>Total - Normal Park Museum Magnet Upper</b>	<b>60,438</b>	<b>8,612</b>	<b>-</b>	<b>69,050</b>
141-5-824-0047-1-73300-516910-PWOB-0000	Part-Time - No Benefits (2 FTE)	16,986	8,500		25,486
141-5-824-0047-1-73300-518810-0000-00000	Bonus Pay	-	4,000		4,000
141-5-824-0047-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	18,201	2,000		20,201
141-5-824-0047-1-73300-520110-0000-0000	Social Security	-	248		248
141-5-824-0047-1-73300-520110-PWOB-0000	Social Security	2,182	651		2,833
141-5-824-0047-1-73300-520770-PWOB-0000	Medical Insurance PT	3,250			3,250
141-5-824-0047-1-73300-521210-0000-0000	Employer Medicare	-	58		58
141-5-824-0047-1-73300-521210-PWOB-0000	Employer Medicare	510	152		662
141-5-824-0047-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0047-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Chattanooga School Arts &amp; Science</b>	<b>47,129</b>	<b>15,609</b>	<b>-</b>	<b>62,738</b>
141-5-824-0050-1-73300-516910-PWOB-0000	Part-Time - No Benefits (1.5 FTE)	35,053	6,000		41,053
141-5-824-0050-1-73300-518810-0000-00000	Bonus Pay	-	3,000		3,000
141-5-824-0050-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	30,845		(5,000)	25,845
141-5-824-0050-1-73300-520110-0000-0000	Social Security	-	186		186
141-5-824-0050-1-73300-520110-PWOB-0000	Social Security	4,086	62		4,148
141-5-824-0050-1-73300-520770-PWOB-0000	Medical Insurance PT	2,600			2,600
141-5-824-0050-1-73300-521210-0000-0000	Employer Medicare	-	44		44
141-5-824-0050-1-73300-521210-PWOB-0000	Employer Medicare	956		(14)	942
141-5-824-0050-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0050-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Daisy Elementary</b>	<b>79,540</b>	<b>9,292</b>	<b>(5,014)</b>	<b>83,818</b>

141-5-824-0051-1-73300-516910-PWOB-0000	Part-Time - No Benefits (1 FTE)	33,208		(5,000)	28,208
141-5-824-0051-1-73300-518810-0000-00000	Bonus Pay	-	2,000		2,000
141-5-824-0051-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	30,496		(4,000)	26,496
141-5-824-0051-1-73300-520110-0000-0000	Social Security	-	124		124
141-5-824-0051-1-73300-520110-PWOB-0000	Social Security	3,950		(558)	3,392
141-5-824-0051-1-73300-520770-PWOB-0000	Medical Insurance PT	1,950			1,950
141-5-824-0051-1-73300-521210-0000-0000	Employer Medicare	-	29		29
141-5-824-0051-1-73300-521210-PWOB-0000	Employer Medicare	924		(131)	793
141-5-824-0051-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0051-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - McConnell Elementary</b>	<b>76,528</b>	<b>2,153</b>	<b>(9,689)</b>	<b>68,992</b>
141-5-824-0058-1-73300-516910-PWOB-0000	Part-Time - No Benefits (0.5 FTE)	14,066	9,000		23,066
141-5-824-0058-1-73300-518810-0000-00000	Bonus Pay	-	1,000		1,000
141-5-824-0058-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	28,513			28,513
141-5-824-0058-1-73300-520110-0000-0000	Social Security	-	62		62
141-5-824-0058-1-73300-520110-PWOB-0000	Social Security	2,640	558		3,198
141-5-824-0058-1-73300-520770-PWOB-0000	Medical Insurance PT	1,300			1,300
141-5-824-0058-1-73300-521210-0000-0000	Employer Medicare	-	15		15
141-5-824-0058-1-73300-521210-PWOB-0000	Employer Medicare	617	123		740
141-5-824-0058-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0058-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Dupont Elementary</b>	<b>53,136</b>	<b>10,758</b>	<b>-</b>	<b>63,894</b>
141-5-824-0062-1-73300-516910-PWOB-0000	Part-Time - No Benefits	89,015		(17,000)	72,015
141-5-824-0062-1-73300-518810-0000-00000	Bonus Pay	-	4,000		4,000
141-5-824-0062-1-73300-518930-PBEN-0000	Site Director (0.5 FTE)	43,157	2,000		45,157
141-5-824-0062-1-73300-520110-0000-0000	Social Security	-	248		248
141-5-824-0062-1-73300-520110-PBEN-0000	Social Security	2,676	124		2,800
141-5-824-0062-1-73300-520110-PWOB-0000	Social Security	5,519		(1,054)	4,465
141-5-824-0062-1-73300-520410-0000-0000	State Retirement	-	153		153
141-5-824-0062-1-73300-520410-PBEN-0000	State Retirement	5,481	254		5,735
141-5-824-0062-1-73300-520610-PBEN-0000	Life Insurance	40			40
141-5-824-0062-1-73300-520710-PBEN-0000	Medical Insurance	13,320			13,320
141-5-824-0062-1-73300-520770-PWOB-0000	Medical Insurance PT	5,200			5,200
141-5-824-0062-1-73300-520810-PBEN-0000	Dental Insurance	294			294
141-5-824-0062-1-73300-521010-PBEN-0000	Unemployment Compensation	14			14
141-5-824-0062-1-73300-521210-0000-0000	Employer Medicare	-	58		58
141-5-824-0062-1-73300-521210-PBEN-0000	Employer Medicare	626	29		655
141-5-824-0062-1-73300-521210-PWOB-0000	Employer Medicare	1,291		(247)	1,044
141-5-824-0062-1-73300-521710-0000-0000	State Retirement Hybrid	-	27		27
141-5-824-0062-1-73300-521710-PBEN-0000	State Retirement Hybrid	863	40		903
141-5-824-0062-1-73300-529910-PBEN-0000	Long Term Disability	107			107
141-5-824-0062-1-73300-529930-PBEN-0000	Short Term Disability	116			116
141-5-824-0062-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0062-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - East Brainerd Elementary</b>	<b>173,719</b>	<b>6,933</b>	<b>(18,301)</b>	<b>162,351</b>
141-5-824-0065-1-73300-516910-PWOB-0000	Part-Time - No Benefits (4 FTE)	24,671			24,671
141-5-824-0065-1-73300-518810-0000-00000	Bonus Pay	-	3,000		3,000
141-5-824-0065-1-73300-518930-PBEN-0000	Site Director (1 FTE)	34,105	6,000		40,105
141-5-824-0065-1-73300-520110-0000-0000	Social Security	-	186		186
141-5-824-0065-1-73300-520110-PBEN-0000	Social Security	2,115	372		2,487
141-5-824-0065-1-73300-520110-PWOB-0000	Social Security	1,530			1,530
141-5-824-0065-1-73300-520410-0000-0000	State Retirement	-	153		153
141-5-824-0065-1-73300-520410-PBEN-0000	State Retirement	4,331	762		5,093
141-5-824-0065-1-73300-520610-PBEN-0000	Life Insurance	40			40
141-5-824-0065-1-73300-520710-PBEN-0000	Medical Insurance	13,320			13,320
141-5-824-0065-1-73300-520770-PWOB-0000	Medical Insurance PT	1,950			1,950
141-5-824-0065-1-73300-520810-PBEN-0000	Dental Insurance	294			294
141-5-824-0065-1-73300-521010-PBEN-0000	Unemployment Compensation	14			14
141-5-824-0065-1-73300-521210-0000-0000	Employer Medicare	-	44		44
141-5-824-0065-1-73300-521210-PBEN-0000	Employer Medicare	495	87		582
141-5-824-0065-1-73300-521210-PWOB-0000	Employer Medicare	358			358
141-5-824-0065-1-73300-521710-0000-0000	State Retirement Hybrid	-	27		27
141-5-824-0065-1-73300-521710-PBEN-0000	State Retirement Hybrid	682	120		802
141-5-824-0065-1-73300-529910-PBEN-0000	Long Term Disability	107			107
141-5-824-0065-1-73300-529930-PBEN-0000	Short Term Disability	116			116
141-5-824-0065-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0065-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - East Ridge Elementary</b>	<b>90,128</b>	<b>10,751</b>	<b>-</b>	<b>100,879</b>

141-5-824-0085-1-73300-516910-PWOB-0000	Part-Time - No Benefits (1 FTE)	99,648		(30,000)	69,648
141-5-824-0085-1-73300-518810-0000-00000	Bonus Pay	-	6,000		6,000
141-5-824-0085-1-73300-518930-PBEN-0000	Site Director (1 FTE)	45,227		(5,000)	40,227
141-5-824-0085-1-73300-520110-0000-0000	Social Security	-	372		372
141-5-824-0085-1-73300-520110-PBEN-0000	Social Security	2,804		(310)	2,494
141-5-824-0085-1-73300-520110-PWOB-0000	Social Security	6,178		(1,860)	4,318
141-5-824-0085-1-73300-520410-0000-0000	State Retirement	-	153		153
141-5-824-0085-1-73300-520410-PBEN-0000	State Retirement	5,744		(635)	5,109
141-5-824-0085-1-73300-520610-PBEN-0000	Life Insurance	40			40
141-5-824-0085-1-73300-520710-PBEN-0000	Medical Insurance	13,320			13,320
141-5-824-0085-1-73300-520770-PWOB-0000	Medical Insurance PT	3,900			3,900
141-5-824-0085-1-73300-520810-PBEN-0000	Dental Insurance	294			294
141-5-824-0085-1-73300-521010-PBEN-0000	Unemployment Compensation	14			14
141-5-824-0085-1-73300-521210-0000-0000	Employer Medicare	-	87		87
141-5-824-0085-1-73300-521210-PBEN-0000	Employer Medicare	656		(73)	583
141-5-824-0085-1-73300-521210-PWOB-0000	Employer Medicare	1,445		(435)	1,010
141-5-824-0085-1-73300-521710-0000-0000	State Retirement Hybrid	-	27		27
141-5-824-0085-1-73300-521710-PBEN-0000	State Retirement Hybrid	905		(100)	805
141-5-824-0085-1-73300-529910-PBEN-0000	Long Term Disability	107			107
141-5-824-0085-1-73300-529930-PBEN-0000	Short Term Disability	116			116
141-5-824-0085-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0085-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Middle Valley Elementary</b>	<b>186,398</b>	<b>6,639</b>	<b>(38,413)</b>	<b>154,624</b>
141-5-824-0090-1-73300-516910-PWOB-0000	Part-Time - No Benefits (1.5 FTE)	28,673	5,000		33,673
141-5-824-0090-1-73300-518810-0000-00000	Bonus Pay	-	2,000		2,000
141-5-824-0090-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	31,173	2,000		33,173
141-5-824-0090-1-73300-520110-0000-0000	Social Security	-	124		124
141-5-824-0090-1-73300-520110-PWOB-0000	Social Security	3,710	434		4,144
141-5-824-0090-1-73300-520770-PWOB-0000	Medical Insurance PT	2,600			2,600
141-5-824-0090-1-73300-521210-0000-0000	Employer Medicare	-	29		29
141-5-824-0090-1-73300-521210-PWOB-0000	Employer Medicare	868	101		969
141-5-824-0090-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0090-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Harrison Elementary</b>	<b>73,024</b>	<b>9,688</b>	<b>-</b>	<b>82,712</b>
141-5-824-0097-1-73300-516910-PWOB-0000	Part-Time - No Benefits (0.5 FTE)	11,957	3,000		14,957
141-5-824-0097-1-73300-518810-0000-00000	Bonus Pay	-	2,000		2,000
141-5-824-0097-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	29,828	3,000		32,828
141-5-824-0097-1-73300-520110-0000-0000	Social Security	-	124		124
141-5-824-0097-1-73300-520110-PWOB-0000	Social Security	2,591	372		2,963
141-5-824-0097-1-73300-520770-PWOB-0000	Medical Insurance PT	1,300			1,300
141-5-824-0097-1-73300-521210-0000-0000	Employer Medicare	-	29		29
141-5-824-0097-1-73300-521210-PWOB-0000	Employer Medicare	606	87		693
141-5-824-0097-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0097-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Barger Academy</b>	<b>52,282</b>	<b>8,612</b>	<b>-</b>	<b>60,894</b>
141-5-824-0125-1-73300-516910-PWOB-0000	Part-Time - No Benefits (0.5 FTE)	10,532	3,000		13,532
141-5-824-0125-1-73300-518810-0000-00000	Bonus Pay	-	2,000		2,000
141-5-824-0125-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	26,067	2,000		28,067
141-5-824-0125-1-73300-520110-0000-0000	Social Security	-	124		124
141-5-824-0125-1-73300-520110-PWOB-0000	Social Security	2,269	310		2,579
141-5-824-0125-1-73300-520770-PWOB-0000	Medical Insurance PT	1,300			1,300
141-5-824-0125-1-73300-521210-0000-0000	Employer Medicare	-	29		29
141-5-824-0125-1-73300-521210-PWOB-0000	Employer Medicare	531	72		603
141-5-824-0125-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0125-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Lookout Mountain Elementary</b>	<b>46,699</b>	<b>7,535</b>	<b>-</b>	<b>54,234</b>
141-5-824-0127-1-73300-516910-PWOB-0000	Part-Time - No Benefits (0.5 FTE)	32,631		(14,000)	18,631
141-5-824-0127-1-73300-518810-0000-0000	Bonus Pay	-	1,000		1,000
141-5-824-0127-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	29,539		(2,000)	27,539
141-5-824-0127-1-73300-520110-0000-0000	Social Security	-	62		62
141-5-824-0127-1-73300-520110-PWOB-0000	Social Security	3,855		(993)	2,862
141-5-824-0127-1-73300-520770-PWOB-0000	Medical Insurance PT	1,300			1,300
141-5-824-0127-1-73300-521210-0000-0000	Employer Medicare	-	15		15
141-5-824-0127-1-73300-521210-PWOB-0000	Employer Medicare	901		(232)	669
141-5-824-0127-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0127-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Hixson Elementary</b>	<b>74,226</b>	<b>1,077</b>	<b>(17,225)</b>	<b>58,078</b>

141-5-824-0147-1-73300-516910-PWOB-0000	Part-Time - No Benefits (1 FTE)	14,430	10,000		24,430
141-5-824-0147-1-73300-518810-0000-00000	Bonus Pay	-	2,000		2,000
141-5-824-0147-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	26,070			26,070
141-5-824-0147-1-73300-520110-0000-0000	Social Security	-	124		124
141-5-824-0147-1-73300-520110-PWOB-0000	Social Security	2,511	620		3,131
141-5-824-0147-1-73300-520770-PWOB-0000	Medical Insurance PT	1,950			1,950
141-5-824-0147-1-73300-521210-0000-0000	Employer Medicare	-	29		29
141-5-824-0147-1-73300-521210-PWOB-0000	Employer Medicare	587	145		732
141-5-824-0147-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0147-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - North Hamilton County Elementary</b>	<b>51,548</b>	<b>12,918</b>	<b>-</b>	<b>64,466</b>
141-5-824-0148-1-73300-516910-PWOB-0000	Part-Time - No Benefits	36,411		(12,000)	24,411
141-5-824-0148-1-73300-518810-0000-00000	Bonus Pay	-	3,000		3,000
141-5-824-0148-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	31,509		(7,000)	24,509
141-5-824-0148-1-73300-520110-0000-0000	Social Security	-	186		186
141-5-824-0148-1-73300-520110-PWOB-0000	Social Security	4,211		(2,278)	1,933
141-5-824-0148-1-73300-520770-PWOB-0000	Medical Insurance PT	1,950			1,950
141-5-824-0148-1-73300-521210-0000-0000	Employer Medicare	-	44		44
141-5-824-0148-1-73300-521210-PWOB-0000	Employer Medicare	985		(276)	709
141-5-824-0148-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0148-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Wolfvever Creek Elementary</b>	<b>81,066</b>	<b>3,230</b>	<b>(21,554)</b>	<b>62,742</b>
141-5-824-0149-1-73300-516910-PWOB-0000	Part-Time - No Benefits (0.5 FTE)	34,971		(15,000)	19,971
141-5-824-0149-1-73300-518810-0000-00000	Bonus Pay	-	2,000		2,000
141-5-824-0149-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	41,354		(12,000)	29,354
141-5-824-0149-1-73300-520110-0000-0000	Social Security	-	124		124
141-5-824-0149-1-73300-520110-PWOB-0000	Social Security	4,732		(1,674)	3,058
141-5-824-0149-1-73300-520770-PWOB-0000	Medical Insurance PT	1,300			1,300
141-5-824-0149-1-73300-521210-0000-0000	Employer Medicare	-	29		29
141-5-824-0149-1-73300-521210-PWOB-0000	Employer Medicare	1,107		(392)	715
141-5-824-0149-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0149-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Nolan Elementary</b>	<b>89,464</b>	<b>2,153</b>	<b>(29,066)</b>	<b>62,551</b>
141-5-824-0155-1-73300-516910-PWOB-0000	Part-Time - No Benefits (1 FTE)	30,800	4,000		34,800
141-5-824-0155-1-73300-518810-0000-00000	Bonus Pay	-	2,000		2,000
141-5-824-0155-1-73300-518930-PBEN-0000	Site Director (1 FTE)	37,559		(5,000)	32,559
141-5-824-0155-1-73300-520110-0000-0000	Social Security	-	124		124
141-5-824-0155-1-73300-520110-PBEN-0000	Social Security	2,329		(310)	2,019
141-5-824-0155-1-73300-520110-PWOB-0000	Social Security	1,910	248		2,158
141-5-824-0155-1-73300-520410-PBEN-0000	State Retirement	4,770		(635)	4,135
141-5-824-0155-1-73300-520610-PBEN-0000	Life Insurance	40			40
141-5-824-0155-1-73300-520710-PBEN-0000	Medical Insurance	13,320			13,320
141-5-824-0155-1-73300-520770-PWOB-0000	Medical Insurance PT	1,300			1,300
141-5-824-0155-1-73300-520810-PBEN-0000	Dental Insurance	294			294
141-5-824-0155-1-73300-521010-PBEN-0000	Unemployment Compensation	14			14
141-5-824-0155-1-73300-521210-0000-0000	Employer Medicare	-	29		29
141-5-824-0155-1-73300-521210-PBEN-0000	Employer Medicare	545		(73)	472
141-5-824-0155-1-73300-521210-PWOB-0000	Employer Medicare	447	58		505
141-5-824-0155-1-73300-521710-PBEN-0000	State Retirement Hybrid	751		(100)	651
141-5-824-0155-1-73300-529910-PBEN-0000	Long Term Disability	107			107
141-5-824-0155-1-73300-529930-PBEN-0000	Short Term Disability	116			116
141-5-824-0155-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0155-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Ooltewah Elementary</b>	<b>100,302</b>	<b>6,459</b>	<b>(6,118)</b>	<b>100,643</b>
141-5-824-0162-4-73300-516910-PWOB-0000	Part-Time - No Benefits (0.5 FTE)	28,449		(3,000)	25,449
141-5-824-0162-4-73300-518810-0000-00000	Bonus Pay	-	1,000		1,000
141-5-824-0162-4-73300-518930-PWOB-0000	Site Director (0.5 FTE)	26,102	8,000		34,102
141-5-824-0162-4-73300-520110-0000-0000	Social Security	-	62		62
141-5-824-0162-4-73300-520110-PWOB-0000	Social Security	3,382	310		3,692
141-5-824-0162-1-73300-520770-PWOB-0000	Medical Insurance PT	1,300			1,300
141-5-824-0162-4-73300-521210-0000-0000	Employer Medicare	-	15		15
141-5-824-0162-4-73300-521210-PWOB-0000	Employer Medicare	791	73		864
141-5-824-0162-4-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0162-4-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Chattanooga School for Liberal Arts</b>	<b>66,024</b>	<b>9,460</b>	<b>(3,000)</b>	<b>72,484</b>

141-5-824-0171-1-73300-516910-PWOB-0000	Part-Time - No Benefits (2 FTE)	48,961	2,000		50,961
141-5-824-0171-1-73300-518810-0000-00000	Bonus Pay	-	3,000		3,000
141-5-824-0171-1-73300-518930-PBEN-0000	Site Director (1 FTE)	43,277			43,277
141-5-824-0171-1-73300-520110-0000-0000	Social Security	-	186		186
141-5-824-0171-1-73300-520110-PBEN-0000	Social Security	2,683			2,683
141-5-824-0171-1-73300-520110-PWOB-0000	Social Security	3,036	124		3,160
141-5-824-0171-1-73300-520410-0000-0000	State Retirement	-	153		153
141-5-824-0171-1-73300-520410-PBEN-0000	State Retirement	5,496			5,496
141-5-824-0171-1-73300-520610-PBEN-0000	Life Insurance	40			40
141-5-824-0171-1-73300-520710-PBEN-0000	Medical Insurance	13,320			13,320
141-5-824-0171-1-73300-520770-PWOB-0000	Medical Insurance PT	2,600			2,600
141-5-824-0171-1-73300-520810-PBEN-0000	Dental Insurance	294			294
141-5-824-0171-1-73300-521010-PBEN-0000	Unemployment Compensation	14			14
141-5-824-0171-1-73300-521210-0000-0000	Employer Medicare	-	44		44
141-5-824-0171-1-73300-521210-PBEN-0000	Employer Medicare	628			628
141-5-824-0171-1-73300-521210-PWOB-0000	Employer Medicare	710	29		739
141-5-824-0171-1-73300-521710-0000-0000	State Retirement Hybrid	-	27		27
141-5-824-0171-1-73300-521710-PBEN-0000	State Retirement Hybrid	866			866
141-5-824-0171-1-73300-529910-PBEN-0000	Long Term Disability	107			107
141-5-824-0171-1-73300-529930-PBEN-0000	Short Term Disability	116			116
141-5-824-0171-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0171-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Red Bank Elementary</b>	<b>128,148</b>	<b>5,563</b>	<b>-</b>	<b>133,711</b>
141-5-824-0183-1-73300-516910-PWOB-0000	Part-Time - No Benefits (0.5 FTE)	17,661		(2,000)	15,661
141-5-824-0183-1-73300-518810-0000-00000	Bonus Pay	-	1,000		1,000
141-5-824-0183-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	30,562		(5,000)	25,562
141-5-824-0183-1-73300-520110-0000-0000	Social Security	-	62		62
141-5-824-0183-1-73300-520110-PWOB-0000	Social Security	2,990		(434)	2,556
141-5-824-0183-1-73300-520770-PWOB-0000	Medical Insurance PT	1,300			1,300
141-5-824-0183-1-73300-521210-0000-0000	Employer Medicare	-	15		15
141-5-824-0183-1-73300-521210-PWOB-0000	Employer Medicare	699		(101)	598
141-5-824-0183-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0183-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Rivermont Elementary</b>	<b>59,212</b>	<b>1,077</b>	<b>(7,535)</b>	<b>52,754</b>
141-5-824-0215-1-73300-516910-PWOB-0000	Part-Time - No Benefits (0.5 FTE)	20,697	2,000		22,697
141-5-824-0215-1-73300-518810-0000-00000	Bonus Pay	-	3,000		3,000
141-5-824-0215-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	28,994			28,994
141-5-824-0215-1-73300-520110-0000-0000	Social Security	-	186		186
141-5-824-0215-1-73300-520110-PWOB-0000	Social Security	3,081	124		3,205
141-5-824-0215-1-73300-520770-PWOB-0000	Medical Insurance PT	1,300			1,300
141-5-824-0215-1-73300-521210-0000-0000	Employer Medicare	-	44		44
141-5-824-0215-1-73300-521210-PWOB-0000	Employer Medicare	721	29		750
141-5-824-0215-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0215-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Snow Hill Elementary</b>	<b>60,793</b>	<b>5,383</b>	<b>-</b>	<b>66,176</b>
141-5-824-0230-1-73300-516910-PWOB-0000	Part-Time - No Benefits (0.5 FTE)	26,955	13,000		39,955
141-5-824-0230-1-73300-518810-0000-00000	Bonus Pay	-	1,000		1,000
141-5-824-0230-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	27,423			27,423
141-5-824-0230-1-73300-520110-0000-0000	Social Security	-	62		62
141-5-824-0230-1-73300-520110-PWOB-0000	Social Security	3,371	806		4,177
141-5-824-0230-1-73300-520770-PWOB-0000	Medical Insurance PT	1,300			1,300
141-5-824-0230-1-73300-521210-0000-0000	Employer Medicare	-	15		15
141-5-824-0230-1-73300-521210-PWOB-0000	Employer Medicare	788	189		977
141-5-824-0230-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0230-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Soddy Elementary</b>	<b>65,837</b>	<b>15,072</b>	<b>-</b>	<b>80,909</b>
141-5-824-0235-1-73300-516910-PWOB-0000	Part-Time - No Benefits (0.5 FTE)	21,473	4,000		25,473
141-5-824-0235-1-73300-518810-0000-00000	Bonus Pay	-	1,000		1,000
141-5-824-0235-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	20,810	8,000		28,810
141-5-824-0235-1-73300-520110-0000-0000	Social Security	-	62		62
141-5-824-0235-1-73300-520110-PWOB-0000	Social Security	2,622	744		3,366
141-5-824-0235-1-73300-520770-PWOB-0000	Medical Insurance PT	1,300			1,300
141-5-824-0235-1-73300-521210-0000-0000	Employer Medicare	-	15		15
141-5-824-0235-1-73300-521210-PWOB-0000	Employer Medicare	613	170		783
141-5-824-0235-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0235-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Spring Creek Elementary</b>	<b>52,818</b>	<b>13,991</b>	<b>-</b>	<b>66,809</b>

141-5-824-0240-1-73300-516910-PWOB-0000	Part-Time - No Benefits (0.5 FTE)	25,915		(1,000)	24,915
141-5-824-0240-1-73300-518810-0000-00000	Bonus Pay	-	2,000		2,000
141-5-824-0240-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	30,399	3,000		33,399
141-5-824-0240-1-73300-520110-0000-0000	Social Security	-	124		124
141-5-824-0240-1-73300-520110-PWOB-0000	Social Security	3,491	235		3,726
141-5-824-0240-1-73300-520770-PWOB-0000	Medical Insurance PT	1,300			1,300
141-5-824-0240-1-73300-521210-0000-0000	Employer Medicare	-	29		29
141-5-824-0240-1-73300-521210-PWOB-0000	Employer Medicare	817	28		845
141-5-824-0240-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0240-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Thrasher Elementary</b>	<b>67,922</b>	<b>5,416</b>	<b>(1,000)</b>	<b>72,338</b>
141-5-824-0241-1-73300-516910-PWOB-0000	Part-Time - No Benefits (0.5 FTE)	29,383		(15,000)	14,383
141-5-824-0241-1-73300-518810-0000-00000	Bonus Pay	-	1,000		1,000
141-5-824-0241-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	26,484			26,484
141-5-824-0241-1-73300-520110-0000-0000	Social Security	-	62		62
141-5-824-0241-1-73300-520110-PWOB-0000	Social Security	3,464		(930)	2,534
141-5-824-0241-1-73300-520770-PWOB-0000	Medical Insurance PT	1,300			1,300
141-5-824-0241-1-73300-521210-0000-0000	Employer Medicare	-	15		15
141-5-824-0241-1-73300-521210-PWOB-0000	Employer Medicare	810		(217)	593
141-5-824-0241-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0241-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Lookout Valley Elementary</b>	<b>67,441</b>	<b>1,077</b>	<b>(16,147)</b>	<b>52,371</b>
141-5-824-0260-1-73300-516910-PWOB-0000	Part-Time - No Benefits (2.5 FTE)	39,457	8,000		47,457
141-5-824-0260-1-73300-518810-0000-00000	Bonus Pay	-	3,000		3,000
141-5-824-0260-1-73300-518930-PBEN-0000	Site Director (FTE)	40,970		(8,000)	32,970
141-5-824-0260-1-73300-520110-0000-0000	Social Security	-	186		186
141-5-824-0260-1-73300-520110-PBEN-0000	Social Security	2,540		(496)	2,044
141-5-824-0260-1-73300-520110-PWOB-0000	Social Security	2,446	496		2,942
141-5-824-0260-1-73300-520410-0000-0000	State Retirement	-	153		153
141-5-824-0260-1-73300-520410-PBEN-0000	State Retirement	5,203		(1,015)	4,188
141-5-824-0260-1-73300-520610-PBEN-0000	Life Insurance	40			40
141-5-824-0260-1-73300-520710-PBEN-0000	Medical Insurance	13,320			13,320
141-5-824-0260-1-73300-520770-PWOB-0000	Medical Insurance PT	3,250			3,250
141-5-824-0260-1-73300-520810-PBEN-0000	Dental Insurance	294			294
141-5-824-0260-1-73300-521010-PBEN-0000	Unemployment Compensation	14			14
141-5-824-0260-1-73300-521210-0000-0000	Employer Medicare	-	44		44
141-5-824-0260-1-73300-521210-PBEN-0000	Employer Medicare	594		(116)	478
141-5-824-0260-1-73300-521210-PWOB-0000	Employer Medicare	572	116		688
141-5-824-0260-1-73300-521710-0000-0000	State Retirement Hybrid	-	27		27
141-5-824-0260-1-73300-521710-PBEN-0000	State Retirement Hybrid	819		(160)	659
141-5-824-0260-1-73300-529910-PBEN-0000	Long Term Disability	107			107
141-5-824-0260-1-73300-529930-PBEN-0000	Short Term Disability	116			116
141-5-824-0260-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0260-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total - Smith Elementary</b>	<b>115,742</b>	<b>12,022</b>	<b>(9,787)</b>	<b>117,977</b>
141-5-824-0265-1-73300-516910-PWOB-0000	Part-Time - No Benefits (1.5 FTE)	43,690		(3,000)	40,690
141-5-824-0265-1-73300-518810-0000-00000	Bonus Pay	-	3,000		3,000
141-5-824-0265-1-73300-518930-PWOB-0000	Site Director (0.5 FTE)	29,596	4,000		33,596
141-5-824-0265-1-73300-520110-0000-0000	Social Security	-	186		186
141-5-824-0265-1-73300-520110-PWOB-0000	Social Security	4,544	62		4,606
141-5-824-0265-1-73300-520770-PWOB-0000	Medical Insurance PT	2,600			2,600
141-5-824-0265-1-73300-521210-0000-0000	Employer Medicare	-	44		44
141-5-824-0265-1-73300-521210-PWOB-0000	Employer Medicare	1,063	14		1,077
141-5-824-0265-1-73300-549990-0000-0000	Other Supplies And Materials	3,000			3,000
141-5-824-0265-1-73300-559990-0000-0000	Other Charges	3,000			3,000
	<b>Total SACC - Westview Elementary</b>	<b>87,493</b>	<b>7,306</b>	<b>(3,000)</b>	<b>91,799</b>
	<b>TOTAL BUDGET</b>	<b>3,957,973</b>	<b>335,300</b>	<b>(335,300)</b>	<b>3,957,973</b>

**To:** Hamilton County Board of Education  
Dr. Justin Robertson, Superintendent

**From:** Mary Ellen Heuton, CPA – Chief Financial Officer

**Date:** October 9, 2025

**Subject:** FY26 Budget Amendment – General Purpose

**Board Agenda Category:**

- Consent Agenda
  - Action Item
  - Reports and Information
- 

Board approval is requested to amend the FY26 General Purpose Operating Budget as follows:

- Transfers between accounts to reclassify existing budget appropriations between various lines as indicated in the attachment. These transfers will not increase the total FY26 budget.
- Adjust revenue coding for Future Ready Institutes Early Childhood:
  - Reclassifying revenue mistakenly coded under another project to the correct code which reflects the funding is coming from assigned fund balance because revenue was received in a previous year
  - Reducing the revenue and appropriation by \$1,033.76 to reflect the actual unspent funds from FY25.
- Adjust revenue coding for County funding for CTE Expansion:
  - Reclassifying revenue mistakenly coded as coming from fund balance when the funding is coming from the County on a reimbursement basis
- Adjust revenue coding for the East Side Elementary turf approved at the July 17, 2025 meeting.
  - Reclassifying revenue mistakenly coded as coming from Committed Fund Balance whereas it is sitting in Unassigned at 6/30/25.
- Reappropriate funds for projects that were appropriated but not spent or encumbered before June 30; funds are in Assigned Fund Balance at 6/30/25:
  - \$1,177,002.50 for Student Devices
  - \$81,895.48 for Staff Devices
  - \$500,000 for Security
  - \$770,563.00 for Budget Modeling and MUNIS

- Appropriate funds for projects that had surplus funds from FY25; funds are in Assigned Fund Balance at 6/30/25:
  - \$10,000.00 for School Resource Development Institute from a donation in FY25
  - \$12,193.55 for Dual Enrollment from surplus budget
- As part of our facilities planning, we approved facility evaluations for architectural studies at Westview, Apison, and East Brainerd Annex (Cigna) at the September 18, 2025 Board meeting. We are now requesting approval to appropriate \$38,640.00 from unassigned fund balance for a transfer to Capital Projects to engage for these Architectural Services.
- In September 2024, the Board authorized the acquisition by the State of an easement at Westview Elementary with proceeds of \$271,469. In November 2024, the Board approved utilizing \$75,500 of these funds for the East Hamilton High School Amphitheater project to cover costs in excess of the \$300,000 funded from County ARPA funds. The project has required additional electrical work, overhead structure as well as infrastructure items. On September 18, 2025, an emergency approval was given by Executive Committee for a Change Order for this work. The additional cost of \$100,232.89 will be funded from the easement; as these funds rolled into unassigned fund balance at 6/30/25, we request approval to appropriate \$100,232.89 from unassigned fund balance.

#### Opportunity 2030 Commitment Connection

- Every Student Learns
- Every Student Belongs
- Every School Equipped
- Every Employee Valued
- Every Community Served

Hamilton County Schools  
Fiscal Year 2026  
Operating Budget  
Expenditures by Function - Approved and Amended  
October 9, 2025

Function	Function Description	Approved Operating	Transfer Between Accounts Through 09/30/2025	Revenue Appropriations Through 10/9/25	Fund Balance Appropriations Through 10/9/25	Amended Operating
71100	Regular Education Instruction	243,475,983	1,068,190	1,293,883	5,089,196	250,927,252
71200	Special Education Instruction	42,992,520	(13,155)	2,008,449	-	44,987,814
71300	CTE Instructional	13,665,424	27,678	445,812	-	14,138,914
71400	Student Body Education	4,563,624	48,000	-	-	4,611,624
72110	Attendance	7,788,126	(56,614)	1,216,255	-	8,947,768
72120	Health Services	7,027,172	83,257	36,097	-	7,146,526
72130	Other Student Support	28,284,451	43,922	1,211,187	500,000	30,039,560
72210	Reg Ed Instruction Support	29,268,158	(907,384)	1,169,563	-	29,530,337
72220	Special Ed Instruction Support	12,609,004	(129,199)	405,045	-	12,884,850
72230	CTE Instructional Support	698,213	8,133	-	-	706,346
72250	Educational Technology	9,227,277	104,057	-	81,895	9,413,229
72310	Board Of Education	6,928,477	(154,586)	-	-	6,773,891
72320	Director Of Schools	2,873,493	166,593	-	-	3,040,086
72410	Office Of The Principal	38,349,469	-	-	-	38,349,469
72510	Fiscal Services	4,442,932	(104,057)	-	780,563	5,119,438
72520	Human Resources/Personnel	4,568,932	93,320	-	-	4,662,252
72610	Operation Of Plant	35,490,091	(630,028)	-	-	34,860,063
72620	Maintenance Of Plant	12,312,491	-	-	-	12,312,491
72710	Transportation	28,667,109	(34,685)	-	-	28,632,425
72810	Central And Other	2,676,353	381,582	-	-	3,057,935
73100	School Nutrition	5,850	-	-	-	5,850
73300	Community Services	748,518	4,976	-	-	753,494
73400	Early Childhood Education	134,838	-	-	-	134,838
76100	Regular Capital Outlay	-	-	-	101,412	101,412
99100	Operating Transfers	-	-	-	-	-
99110	Transfer to Capital Maintenance	-	-	-	138,873	138,873
99120	Transfer to Charter Schools	40,782,369	-	538,672	-	41,321,041
	Grand Total	577,580,874	-	8,324,963	6,691,939	592,597,776

**Summary of Revenue Appropriations**

7/17/2025	FY26 State Funded Teacher Bonus	8,289,900
10/9/2025	Correction of Revenue for FRI Early Childhood	(1,034)
10/9/2025	Additional Nurse Practitioner Supported by County	36,097
	Total Revenue Appropriations	<u>8,324,963</u>

**Summary of Fund Balance Appropriations**

7/17/2025	Appropriate funds from Unassigned for East Side Elementary Multi-purpose Field *source correction :	101,412
9/18/2025	Reappropriate funds from Committed for Education for FY26 Matching Bonus	3,500,000
9/18/2025	Appropriate funds from Assigned for Education for FY26 Matching Bonus	400,000
10/9/2025	Reappropriate from Assigned for Education for Student and Staff Device, Security, and Budget Modeling	2,529,461
10/9/2025	Reappropriate funds from Assigned for Education for SRDI and Dual Enrollment	22,194
10/9/2025	Appropriate funds from Unassigned for Architectural Services and East Hamilton Amphitheatre	138,873
	Total Fund Balance Appropriations	<u>6,691,939</u>

**To:** Hamilton County Board of Education  
Dr. Justin Robertson, Superintendent

**From:** Mary Ellen Heuton, CPA – Chief Financial Officer

**Date:** October 9, 2025

**Subject:** FY26 Budget Amendment – Self-Funded Program

**Board Agenda Category:**

- Consent Agenda
  - Action Item
  - Reports and Information
- 

Board approval is requested to amend the FY26 Self-Funded Budget as follows:

- As part of the purchase of the Cigna property, in 2022, the seller placed \$250,000 in escrow for the construction of a playground on the property. We are now ready to initiate the project and are requesting an adjustment to revenue in our FY26 Self-funded Budget in our Community Donations account for \$250,000 and an appropriation of this \$250,000 for the construction.

Opportunity 2030 Commitment Connection

- Every Student Learns
- Every Student Belongs
- Every School Equipped
- Every Employee Valued
- Every Community Served

**To:** Hamilton County Board of Education  
Dr. Justin Robertson, Superintendent

**From:** Shannon Moody, Chief Strategy Officer

**Date:** October 9, 2025

**Subject:** Proposed Policy Revision, 1<sup>st</sup> Read

**Board Agenda Category:**

- Consent Agenda
  - Action Item
  - Reports and Information
- 

The Administration, in consultation and under the advisement of the Board's attorneys, has reviewed and recommended the following policies for a first reading.

<b><u>POLICY #</u></b>	<b><u>POLICY TITLE</u></b>
1.400	School Board Meetings

**Opportunity 2030 Commitment Connection**

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# Hamilton County Board of Education

Monitoring: <b>Review: Annually, in September</b>	Descriptor Term: <b>School Board Meetings</b>	Descriptor Code: <b>1.400</b>	Issued Date: <b>02/15/07</b>
		Rescinded:	Revised: <b>10/19/23</b>

1 The Board will transact all business at official meetings which may be either regular or special.

2

3 Every meeting of the Board, except with the attorney to discuss pending or threatened litigation or to  
4 discuss school security<sup>5</sup>, will be open to the public.<sup>1</sup> Open meetings will be physically accessible to all  
5 students, employees, and interested citizens.<sup>3</sup>

6

7 Each member of the Board shall consider it his/her duty to appear at every Board meeting properly  
8 prepared to discuss the items appearing on the agenda.

9

10 Each Board member is obligated to attend all Board meetings unless physically incapacitated or  
11 prevented from doing so due to circumstances beyond his/her control. Whenever possible, each  
12 member should advise the chair of an impending absence.

13

## 14 **REGULAR MEETINGS**

15

16 The Board will hold regular monthly meetings based upon a calendar approved in April of each year.  
17 The meetings will ~~begin with~~ include a work session at 6:00 p.m. ~~at 4:30 pm to hear public comments,~~  
18 to hear updates from the Administration, to review the agenda, and to consider such other matters as  
19 the Board deems necessary. The business session will include public comment and voting matters.  
20 This meeting will be held on a separate day and begin at 6:00 pm unless the Board must first go into  
21 executive session. ~~Each April the Board will approve an annual calendar of meetings.~~

22

23 In instances when any regular meeting date falls on a legal holiday, the meeting shall be rescheduled  
24 by the chair.

25

## 26 **SPECIAL MEETINGS**

27

28 The Board shall hold such special meetings as necessary to transact the business of the Board. Such  
29 meetings shall be called by the chair whenever, in his/her judgment, the interests of the schools require  
30 it, or when requested to do so by a majority of the Board.<sup>2</sup>

31

32 Only business related to the call of the meeting, and details related to agenda items shall be discussed  
33 or transacted by the Board at a special meeting.

---

1 Special meetings may be called for either of the following purposes:

2

- 3 1. To enable the Board to concentrate and take action on a single problem or set of problems; or
- 4 2. To enable the Board to take emergency action between regular meetings.

5 **ADJOURNED MEETINGS**

6 The Board may hold an adjourned meeting of the Board to a specific locality and at a specific time  
7 provided; however, the Board shall give adequate public notice of such meeting.

8

9 **ELECTRONIC PARTICIPATION IN MEETINGS<sup>4</sup>**

10

11 The Board member may attend a scheduled Board meeting by electronic means including, but not  
12 limited to, telephone, videoconferencing or other web-based media if the member participating by  
13 electronic means can be visually identified by the chair, and if the member is absent: 1) because the  
14 member is required to be out of Hamilton County for the member's work; 2) because the member is  
15 sick or in a period of convalescence on the advice of a healthcare professional that the member not  
16 appear in person; 3) due to inclement weather or natural disaster if Hamilton County schools are  
17 closed; 4) because the member has a family emergency that inhibits the member from attending in  
18 person; or 5) because the member is out of the county due to military service.

19

20 No Board meeting shall be conducted with electronic participation unless a quorum of members is  
21 physically present at the location of the meeting. Only members who are 1) out of the county for work;  
22 2) sick or in a period of convalescence; 3) experiencing inclement weather or natural disaster where  
23 Hamilton County schools are closed; 4) experiencing a family emergency; or 5) out of the county due  
24 to military service may attend and participate in the meeting electronically.

25

26 A Board member wishing to participate in a scheduled Board meeting electronically who is or will be  
27 out of the county because of work shall give at least five (5) days notice prior to the scheduled Board  
28 meeting of the member's intention to participate electronically.

29

30 No Board member shall participate electronically in Board meetings due to being out of the county for  
31 work more than two (2) times per school year, provided, however, that this limitation shall not apply to  
32 a Board member who is out of the county due to military service.

33

34 No Board member shall participate electronically in Board meetings due to being sick or in a period of  
35 convalescence more than three (3) times per school year.

36

37 No Board member shall participate electronically in Board meetings due to inclement weather or

- 1 natural disaster more than three (3) times per school year.
- 2
- 3 No Board member shall participate electronically in Board meetings due to a family emergency more
- 4 than two (2) times per school year.

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Legal References

1. TCA 8-44-102 2. TCA 49-2-202(c)(1)
2. TCA 49-2-202(c)(1)
3. 28 CFR § 36.201(a); 36.202
4. T.C.A. 49-2-203(c) 40
5. TCA 49-6-804

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Cross References

School Board Legal Status and Authority 1.100 37  
Section 504/ADA Grievance Procedures 1.802 38  
Board-Director Relations 1.205 39

**To:** Hamilton County Board of Education  
Dr. Justin Robertson, Superintendent

**From:** Shannon Moody, Chief Strategy Officer

**Date:** October 9, 2025

**Subject:** Proposed Policy Revision, Final Read

**Board Agenda Category:**

- Consent Agenda
  - Action Item
  - Reports and Information
- 

The Administration, in consultation and under the advisement of the Board's attorneys, has reviewed and recommended the following policies:

First and Final Read:

<b><u>POLICY #</u></b>	<b><u>POLICY TITLE</u></b>
1.806	Advertising and Distribution of Materials in the Schools

Second and Final Read:

<b><u>POLICY #</u></b>	<b><u>POLICY TITLE</u></b>
1.407	School District Records
1.700	School Board Goals
1.701	School District Planning

**Opportunity 2030 Commitment Connection**

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# Hamilton County Board of Education

Monitoring: <b>Review: Annually, in September</b>	Descriptor Term: <b>Advertising and Distribution of Materials in the Schools</b>	Descriptor Code: <b>1.806</b>	Issued Date: <b>12/16/04</b>
		Rescinded:	Revised: <b>10/09/25</b>

1 No part of the school system, including the facilities, the name, the staff, and the students, shall be  
2 used for advertising or promoting the interests of any commercial, political or other non-school agency  
3 or organization except that:

- 4
- 5 **1. The primary purpose of the advertising is to benefit a program of Hamilton County Schools;**  
6 **provided, however, that no school or employee may endorse such commercial Enterprise**  
7 **without express approval of the Director of Schools or his or her designee.**  
8
- 9 2. The school, with the approval of the director of schools or his or her designee, may  
10 cooperate in furthering the work of any nonprofit, community-wide social service agency,  
11 provided that such cooperation does not restrict or impair the educational programs of  
12 the schools;  
13
- 14 3. The school, with the approval of the director of schools or his or her designee, may participate  
15 in radio or television programs under acceptable commercial sponsorship when such programs  
16 are educationally beneficial;  
17
- 18 4. Community, educational, charitable, recreational and other similar civic groups, with the approval  
19 of the principal, director of schools or his or her designee, may advertise events pertinent to  
20 students' interests or involvement. Such advertisement, including the distribution of materials,  
21 shall be subject to any procedures related to time, place and manner established by the  
22 principal;  
23
- 24 5. The principal shall screen all materials prior to distribution to ensure their appropriateness.  
25 The principal, with the approval of the director of schools or his or her designee, may  
26 prohibit materials that:  
27
  - 28 a. would likely to cause substantial disruption of the operation of the school;
  - 29 b. violate the rights of others;
  - 30 c. are obscene, lewd or sexually explicit; or
  - 31 d. students would reasonably believe to be sponsored or endorsed by the school.  
32
- 33 6. The school may, upon approval of the director of schools or his or her designee, cooperate with  
34 any governmental agency in promoting activities which advance the education or other best  
35 interests of the students;  
36
- 37 7. Political literature shall not be distributed through the school to students, nor sent home to

- 1 parents, nor placed in teachers' mailboxes, lounges, or on school premises;  
2  
3 8. Political signs for people who are running for public office shall not be allowed on school  
4 property except those being held by poll workers on election day;
- 5 9. School publications may accept and publish paid advertising under procedures established by  
6 the director of schools;  
7
- 8 10. The principal shall at his/her discretion make one place available for the distribution of  
9 such material or may refuse to distribute material. Any exception to this policy shall require  
10 Board approval; and  
11
- 12 11. Principals are not to use school time to distribute materials to students which are not related to  
13 the school system and/or the instructional program. If a principal receives a request to distribute  
14 non-school related material, the principal will determine, with the approval of the director of  
15 schools or his or her designee, if appropriate to distribute to students. If so, the principal will  
16 place the material in a common area of the building and make the students aware that such  
17 material may be picked up by the students, if interested.  
18
- 19 12. The school directory of employed personnel will be distributed to school and district  
20 administrators, and education-related agencies which have been authorized by the Director of  
21 Schools. The distribution of personnel directories in which names and addresses of employees  
22 are listed is restricted. Distribution of the directories for political, solicitation, sales or  
23 commercial purposes is prohibited.

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Legal References

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Cross References

Board-Community Relations 1.500  
Vendor Relations 2.809  
Staff-Community Relations 5.606  
Student Publications 6.704

# Hamilton County Board of Education

Monitoring: <b>Review: Annually, in September</b>	Descriptor Term: <b>School District Records</b>	Descriptor Code: <b>1.407</b>	Issued Date: <b>06/15/17</b>
		Rescinded:	Revised: <b>10/09/25</b>

1

2 The director of schools shall maintain all school district records required by law, regulation and board  
3 policy. Any citizen of Tennessee shall be permitted during business hours to inspect public records  
4 maintained by the school district unless otherwise prohibited by law. Any citizen of Tennessee may  
5 request in writing and receive copies of open public records subject to the payment of reasonable  
6 costs.<sup>1,2,3,4</sup>

7

8 No records pertaining to individual students will be released for inspection by the public or any  
9 unauthorized persons. In addition, information records, and plans related to security and safety will not  
10 be released for public inspection.<sup>11</sup>

11

12 ~~All requests to inspect or receive copies of records shall be submitted to the Assistant Superintendent  
13 for Human Resources, the district's public records request coordinator and records custodian.<sup>12</sup>~~

14

15 Prior to producing any record, the records custodian shall ensure confidential information is redacted.  
16 Original documents remain intact and confidential information in copies produced for a requestor shall  
17 be redacted. The director of schools shall develop a procedure to redact confidential information.

18

## 19 **REQUESTS FOR INSPECTION<sup>2</sup>**

20

21 Requests for inspection must allow 48 hours for reproduction and redaction of records. Citizens  
22 requesting to inspect public records shall submit their request and a government issued photo  
23 identification card with the citizen's address to the district's public records request coordinator during  
24 normal business hours. Requests may be made in person, **by telephone**, in writing, or by electronic  
25 mail (email). The coordinator shall submit the information to the appropriate records custodian. The  
26 records custodian will contact the citizen and indicate when the records will be available to inspect.

27

28 If the records cannot be made available within seven (7) business days, the records custodian shall  
29 provide a records production letter indicating the time needed to complete the request.

30

31 If the request to inspect is denied, the ~~re-orders records~~ custodian shall provide the citizen with a  
32 records request denial letter indicating the basis for the denial.

33

## 34 **REQUESTS FOR COPIES<sup>2</sup>**



1  
2 Citizens requesting copies of public records shall complete and submit the Records Request Form and  
3 a government issued photo identification card with the citizen's address to the district's public records  
4 request coordinator during normal business hours. The coordinator shall submit the Records Request  
5 Form to the appropriate records custodian.

6  
7 The records custodian shall provide an estimate of the reasonable costs to produce the requested  
8 records. The Tennessee Comptroller of the Treasury, Office of Open Records Counsel Schedule of  
9 Reasonable Charges found at [https://comptroller.tn.gov/content/dam/cot/orc/documents/oorc/policies-  
10 and-guidelines/ScheduleofReasonableCharges.pdf](https://comptroller.tn.gov/content/dam/cot/orc/documents/oorc/policies-and-guidelines/ScheduleofReasonableCharges.pdf) shall be used to determine the reasonable cost. The  
11 records custodian will provide the citizen with an invoice detailing the charges. The citizen shall pay  
12 the estimated reasonable costs by cash, money order, or cashier's check prior to the district producing  
13 the copies. "Reasonable charges" shall include per-copy costs and labor exceeding one hour.

14  
15 If the records cannot be made available within seven (7) business days, the records custodian shall  
16 provide a records production letter indicating the time needed to complete the request.

17  
18 If the request for copies is denied, the records custodian shall provide the citizen with a record request  
19 denial letter detailing the basis for the denial.

## 20 21 **FREQUENT AND MULTIPLE REQUESTS**

22  
23 When the total number of requests for copies made by a requestor within a calendar month exceeds  
24 four (4), the requestor may be charged a fee for any and all labor that is reasonably necessary to  
25 produce copies of the requested records. Prior to charging a reasonable fee, the requestor shall be  
26 notified of this policy and provided with a Notice of Aggregation of Multiple Requestors form. The  
27 Tennessee Comptroller of the Treasury, Office of Open Records Counsel Schedule of Reasonable  
28 Charges found at [https://comptroller.tn.gov/content/dam/cot/orc/documents/oorc/policies-and-  
29 guidelines/ScheduleofReasonableCharges.pdf](https://comptroller.tn.gov/content/dam/cot/orc/documents/oorc/policies-and-guidelines/ScheduleofReasonableCharges.pdf) shall be used to determine the reasonable cost. Further,  
30 the names of persons inspecting records and the date of inspection shall be recorded.

## 31 32 **RECORDS RETENTION**

33  
34 The director of schools and/or his designee(s) shall retain and dispose of school district records in  
35 accordance with the following guidelines: <sup>2,4</sup>

- 36  
37 1. The director of schools and/or his designee(s) will determine if a particular record is of  
38 permanent or temporary value in accordance with regulations promulgated by County Public  
39 Records Commission and the Tennessee Institute for Public Services records manual; <sup>5,6</sup>

- 1        2. Temporary value records which have been kept beyond the required time may be recommended  
2        to the Public Records Commission for destruction;<sup>7, 8</sup>  
3  
4        3. The records that the State Librarian and Archivist desire to preserve in their facilities will be  
5        transferred to the State Library and Archives. The temporary value records rejected by the State  
6        Library and Archives may be transferred to another institution or destroyed;<sup>7, 8, 9</sup>  
7  
8        4. Permanent records will be kept in some usable form (digital, printed, microfilm, etc). If the  
9        director of schools desires to destroy the original permanent record, these records must be  
10       reproduced by microfilming or some other permanent reproduction method. Permission to  
11       destroy any original permanent record after microfilming follows the same procedure noted  
12       above for temporary records;<sup>6, 8</sup> and  
13  
14       5. The director of schools shall establish procedures to safeguard against the unlawful destruction,  
15       removal or loss of records

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Legal References

1. TCA 49-2-301(b)(1)(Z)
2. TCA 10-7-503
3. TCA 10-7-506(a)
4. TCA 49-2-104
5. TCA 10-7-401
6. TCA 10-7-406
7. TCA 10-7-404
8. TCA 10-7-413
9. TCA 10-7-414
10. TCA 39-16-504
11. TCA 10-7-504(p)

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Cross References

- Financial Reports and Records 2.701  
Personnel Records 5.114  
Student Records 6.600

# Hamilton County Board of Education

Monitoring: <b>Review: Annually, in September</b>	Descriptor Term: <b>School Board Goals</b>	Descriptor Code: <b>1.700</b>	Issued Date: <b>12/16/04</b>
		Rescinded:	Revised: <b>10/09/25</b>

1 The Board is charged, on behalf of the public, with the responsibility for determining the educational  
2 goals of the school system. In discharging that responsibility, the Board has adopted the following  
3 goals **aligned with the commitments in our district's strategic plan, Opportunity 2030 in four primary**  
4 **areas: ~~Instruction, personnel, students and operations.~~**  
5

6 The Board shall develop policies to implement the goals within each area, subject to the approved  
7 annual budget, and shall annually review these goals and revise them as necessary so that each  
8 program will at all times support the stated goals. **The Director of Schools will provide an annual**  
9 **report, in the Fall of each year before the start of the school year, aligned to the approved board goals**  
10 **and corresponding outcomes as evidence towards the Board's stated goals.**  
11

## 12 **EVERY STUDENT LEARNS:**

13 **Academic Growth and Proficiency:** Approve budgets that strategically fund high-quality  
14 instructional materials, professional development, and intervention programs to drive student growth  
15 and proficiency.

## 16 **EVERY STUDENT BELONGS:**

17 **Access to Activities:** Establish policies that promote all schools providing access to extracurricular  
18 activities (sports, arts, and clubs) regardless of community financial status, fostering student  
19 connections and belonging.

## 20 **EVERY EMPLOYEE VALUED:**

21 **Employee Compensation and Retention:** Develop policies that guide the district in becoming a top  
22 K-12 school district in employee compensation in Tennessee by 2030 and ensure effective recruitment  
23 and retention practices.

## 24 **EVERY SCHOOL EQUIPPED:**

25 **Optimizing Facilities:** Enact policy requiring annual reviews of school operations and facilities to  
26 maximize capacity and operational efficiency, aligning with district growth and needs.

## 27 **EVERY COMMUNITY SERVED:**

28 **Community-Focused Initiatives:** Approve funding and policy in support of programs that increase  
29 access to post-secondary planning resources, internships, and mentorship opportunities, ensuring every  
30 graduate has a plan for their future.

---

1 **INSTRUCTION**

- 2
- 3 ~~1.—To promote a plan for the organized improvement of school curriculum, including the~~  
4 ~~articulation between elementary and secondary schools;~~
- 5
- 6 ~~2.—To provide offerings which explore a wide range of career and service opportunities;~~
- 7
- 8 ~~3.—To promote an integration of academic, physical, social and emotional growth experiences for~~  
9 ~~each student; and~~
- 10
- 11 ~~4.—To promote the recognition of achievement in all endeavors (example, academic, athletic).~~
- 12

13 **STUDENTS**

- 14
- 15 ~~1.—To structure the overall instructional program to provide sufficient alternatives to meet a~~  
16 ~~variety of individual needs and aspirations;~~
- 17
- 18 ~~2.—To ensure that each student’s interests, capacities and objectives are considered in his/her~~  
19 ~~learning program;~~
- 20
- 21 ~~3.—To develop a comprehensive program for students with disabilities providing the~~  
22 ~~least restrictive pro-grams; and~~
- 23
- 24 ~~4.—To help students gain understanding of themselves, as well as skills and techniques in living~~  
25 ~~and working with others and being responsible citizens.~~
- 26

27 **PERSONNEL**

- 28
- 29 ~~1.—To provide high quality performance by the staff, including both certified and classified~~  
30 ~~personnel;~~
- 31
- 32 ~~2.—To establish acceptable performance standards for all personnel;~~
- 33
- 34 ~~3.—To provide in-service training and professional growth experiences for teachers and administrators; and~~
- 35
- 36 ~~4.—To maintain an evaluation system for the improvement of the instructional system.~~
- 37

38 **OPERATIONS**

- 39
- 40 ~~1.—To make every effort to secure adequate funding for the educational program in support of~~  
41 ~~the stated goals;~~
- 42
- 43 ~~2.—To maintain an adequate system of fiscal and business management;~~
- 44

- 1 ~~3. To develop plans for the efficient use of school facilities; and~~
- 2
- 3 ~~4. To ensure appropriate communication between the director of schools and the Board.~~

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Legal References

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Cross References

Fiscal Management Goals 2.100  
Business Management Goals 3.100  
Instructional Goals 4.100  
Personnel Goals 5.100  
Student Goals 6.100

# Hamilton County Board of Education

Monitoring: <b>Review: Annually, in September</b>	Descriptor Term: <b>School District Planning</b>	Descriptor Code: <b>1.701</b>	Issued Date: <b>12/16/04</b>
		Rescinded:	Revised: <b>10/09/25</b>

1 The Board shall develop comprehensive, long-range plans based on the following:

- 2
- 3 1. Identifying and analyzing the major factors that affect what and how students learn;
- 4
- 5 2. Developing and implementing a written multi-year plan to include a mission
- 6 statement, goals, objectives and strategies;<sup>1</sup>
- 7
- 8 3. Establishing annual program improvement objectives, including major activities, expected
- 9 out- comes, timelines, responsible persons and required resources; and
- 10
- 11 4. Basing major budget decisions on long-range plans.
- 12

13 The Board shall plan by means of an annual retreat with the director of schools and the staff. The purpose  
14 of the retreat shall be to review progress on the implementation of priorities, initiatives, and long-range  
15 plans, to determine which goals have been achieved, whether any new efforts are needed, and to review  
16 major issues that may affect the future. The Board shall also consider annual objectives and strategies  
17 proposed by the director of schools. ~~An annual status report on these plans shall be submitted to the~~  
18 ~~Commissioner of Education by September 1 of each year in the required format.<sup>1</sup>~~

19  
20 The director of schools shall develop necessary procedures, forms or other measures to implement the  
21 goals of this policy.

22  
23 A planning coordinator may be designated by the director of schools to help coordinate system-wide  
24 planning efforts, establish and coordinate an issues management process, aid district staff in developing  
25 specific plans, and monitor implementation schedules.

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#### Legal References

1. [TCA 49-1-613](#)

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#### Cross References

- Role of the Board 1.101  
Qualifications/Duties of the Director of Schools 5.802

**To:** Hamilton County Board of Education  
Dr. Justin Robertson, Superintendent

**From:** Shannon Moody, Chief Strategy Officer

**Date:** October 9, 2025

**Subject:** TISA Accountability Report

**Board Agenda Category:**

- Consent Agenda
  - Action Item
  - Reports and Information
- 

In compliance with T.C.A. § 49-3-112, the Office of Strategy respectfully requests approval of the 25-26 TISA Accountability Report. The TISA Accountability Report will be used to submit an annual accountability report to the Tennessee Department of Education.

Thank you in advance for your consideration of this request. Please do not hesitate to contact me if you have any questions.

**Opportunity 2030 Commitment Connection**

- Every Student Learns
- Every Student Belongs
- Every School Equipped
- Every Employee Valued
- Every Community Served

## Accountability Report Template

The Tennessee Investment in Student Achievement (TISA) public school funding formula marks a significant change in how Tennessee invests in public education. The TISA funding formula updates the way Tennessee funds public education for the first time in over 30 years to empower each student to read proficiently by third grade, prepare each high school graduate for postsecondary success, and provide resources needed for all students to ensure they succeed.

As part of TISA, [T.C.A. § 49-3-112](#) requires each school district, starting in the 2023-24 school year, to submit an annual accountability report to the Tennessee Department of Education (department). This report must include:

- Goals for student achievement
  - One of the goals must include the district's plan to pursue the goal of seventy percent (70%) or more of the district's third grade students to score "met expectations" or "exceeded expectations" on the English Language Arts (ELA) portion of the TCAP tests. This goal must also detail the district's goal to increase 3<sup>rd</sup> grade ELA proficiency rates by 15% of the gap over the next three years (starting with the 2022-23 TCAP results) to achieve the district's stated goal of at least 70% of 3<sup>rd</sup> grade students proficient in ELA.<sup>1</sup>
- Explanation how the district's stated goals can be met within the district's budget.
- For reports submitted **starting in the 2024-25** school year, a description of how the district's budget and expenditures from the prior school year enabled the district to make progress toward the stated student achievement goals.

Each district's TISA accountability report is required to be presented to the public for review and comment before the report is submitted to the department. The report must be submitted annually to the department by November 1<sup>st</sup>.

Furthermore, each district's TISA accountability report is required to be reviewed annually by the TISA Progress Review Board pursuant to [T.C.A. § 49-3-114](#) to determine whether the school district is taking the proper steps to achieve their stated goal.

This template is intended to assist districts in submitting their accountability reports to the department.

For questions, please review the TISA Accountability Report Guidance document or contact [tnedu.funding@tn.gov](mailto:tnedu.funding@tn.gov)

Completed reports should be submitted in ePlan by **November 1, 2025**.

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<sup>1</sup> T.C.A. § 49-3-114 requires the TISA Progress Review Board to review district TISA accountability reports and set a district's minimum goal to increase the district's 3<sup>rd</sup> grade proficiency by 15% of the gap to 70% in 3 years, starting with the 2022-23 TCAP results. This does not apply to districts who have 70% or more of 3<sup>rd</sup> grade students proficient in ELA.

## DISTRICT INFORMATION

District Name		Hamilton County Schools
Director of Schools Name		Dr. Justin Robertson
District Point of Contact for TISA Accountability Report	Name	Shannon Moody
	Phone Number	423-498-7072
	Email Address	<a href="mailto:Moody_s@hcde.org">Moody_s@hcde.org</a>
Percent of 3 <sup>rd</sup> grade students who scored proficient (“met expectations” or “exceeded expectations”) on the English Language Arts (ELA) portion of the most recent spring TCAP		38.8% - 2023 TCAP

## DISTRICT GOAL STATEMENT(S)

<b>Goal Statement 1:</b> 3 <sup>rd</sup> Grade ELA Proficiency <sup>2</sup>	70% of students will score proficient on the 3 <sup>rd</sup> grade ELA TCAP by 2028
<b>Goal Statement 2:</b>	60% of students will meet or exceed the standard on all state assessments (TCAP) by 2030. (Baseline 2022 – 34.7%)
<b>Goal Statement 3:</b>	46% of our economically disadvantaged students will meet or exceed the standard on all state assessments (TCAP) by 2030. (Baseline 2022 – 18.4%)
<b>Goal Statement 4:</b>	20% of our K-2 students will score below the 25 <sup>th</sup> percentile nationally by 2030. (Baseline 2022 – 34%)
<b>Goal Statement 5:</b>	27.8% of our economically disadvantaged K-2 students will score below the 25 <sup>th</sup> percentile nationally by 2030. (Baseline 2022 – 50.8%)

<sup>2</sup> **Note:** This is a required goal pursuant to T.C.A. § 49-3-112 and must include 70% or more of 3<sup>rd</sup> grade students proficient on the ELA TCAP. If your district already has 70% or more of 3<sup>rd</sup> grade students proficient in ELA, please state a goal that either maintains or increases that proficiency rate.

**Goal Statement 1 (3<sup>rd</sup> grade ELA proficiency):** 70% of students will score proficient on the 3<sup>rd</sup> grade ELA TCAP by 2028 (Baseline 2023 – 40.6%)

Year	Annual Outcome Target(s)	Associated Metrics/Data
Year 1: 2023-2024 school year (Actuals)	38.8%	TCAP Results
Year 2: 2024-2025 school year (Actuals)	39.1%	
Year 3: 2025-2026 school year	45%	
Year 4: 2026-2027 school year	60%	
Year 5: 2027-2028 school year	70%	
<p><b>Reflection:</b> Did your district meet its Year 1 outcomes target(s)? How will this impact your action plan for the coming years?</p>	<p>Our third-grade students slightly increased the percentage of students scoring proficient on third grade reading. This will not impact our action plan for the upcoming year, as our strategies are designed to focus on K-2 support which will continue to increase 3rd grade reading proficiency.</p>	
<p><b>Prior Year Report:</b> What were the 2-3 major TISA investments you made in the prior year toward this goal? For each, please note the amount expended (rough estimate) and reflections on whether or not the investment contributed to progressing toward the goal or not, and how so.</p>	<ul style="list-style-type: none"> <li>• <b>Every Student Learns - \$351,400,000 (61%)</b> <ul style="list-style-type: none"> <li>○ School-based staffing model - \$336MM                             <ul style="list-style-type: none"> <li>▪ Exceptional Education (Budget + Strategic Allocation) - \$55MM</li> <li>▪ Strategic Staffing Funds - \$39.1MM</li> </ul> </li> </ul> </li> <li>• <b>Every Student Belongs - \$39,600,000 (7%)</b> <ul style="list-style-type: none"> <li>○ Sustained Personalization Staffing Positions - \$30MM                             <ul style="list-style-type: none"> <li>▪ Student Support Coaches - \$5.8MM</li> <li>▪ Social Workers - \$4.9MM</li> <li>▪ Counselors - \$10.3MM</li> <li>▪ College and Career Advisors - \$1.8MM</li> <li>▪ Nurses - \$5MM</li> </ul> </li> <li>○ School Allocation Funds - \$2.3MM</li> </ul> </li> <li>• <b>Every School Equipped - \$92,200,000 (16%)</b> <ul style="list-style-type: none"> <li>○ Utilities \$15.9MM</li> <li>○ School Safety and Security \$4.5MM</li> <li>○ Hardware, Software, and Equipment \$7.7MM</li> <li>○ Transportation \$28.5MM</li> </ul> </li> <li>• <b>Every Employee Valued – \$23,300,000 (4%)</b> <ul style="list-style-type: none"> <li>○ Differentiated Compensation \$14.5MM                             <ul style="list-style-type: none"> <li>▪ Employee Stipends \$7.5MM</li> <li>▪ Hard to Staff Schools and Certifications \$7MM</li> </ul> </li> <li>○ Employee Benefits and Taxes \$116MM</li> </ul> </li> <li>• <b>Every Community Served - \$12,900,000 (2%)</b> <ul style="list-style-type: none"> <li>○ Specialized Program Staffing \$6.4MM</li> <li>○ Family and Community Engagement \$1.2MM</li> <li>○ Career and Technical Education \$1.4MM</li> </ul> </li> </ul> <p>Comprehensive investments in the areas of our strategic plan will continue to have an impact on progressing towards our goals.</p>	
<p><b>Action Plan:</b> List detailed action steps or strategies for the 2024-2025 school year to meet your annual target.</p>	<ul style="list-style-type: none"> <li>• High-quality curriculum materials</li> <li>• Elementary RTI teachers</li> <li>• After-school tutoring supports</li> <li>• Local benchmark assessment and decision making</li> <li>• Early grades, K-2, literacy supports</li> <li>• Supporting all HCS students to achieve</li> <li>• Aligning measures of success</li> <li>• Delivering high-quality lessons with rigorous instructional materials</li> <li>• Responding and intervening to students' needs</li> </ul>	

**Goal Statement 1 (3<sup>rd</sup> grade ELA proficiency):** 70% of students will score proficient on the 3<sup>rd</sup> grade ELA TCAP by 2028 (Baseline 2023 – 40.6%)

**Budget Narrative:** Describe how your district intends to use their budget to execute the action steps and meet the stated goal.

Our budget will be a priority based budget aligned to the commitments, objectives, and strategies outlined in our strategic plan, Opportunity 2030.  
  
(See [FY26 approved budget](#) highlights and executive summary)

**Goal Statement 2:** 60% of students will meet or exceed the standard on all state assessments (TCAP) by 2030. (Baseline 2022 – 37.4%)

Year	Annual Outcome Target(s)	Associated Metrics/Data
Year 1: 2023-2024 school year (Actuals)	42.1%	TCAP Results
Year 2: 2024-2025 school year (Actuals)	42.4%	
Year 3: 2025-2026 school year	45.3%	
Year 4: 2026-2027 school year	48.9%	
Year 5: 2027-2028 school year	52.6%	

**Reflection:** Did your district meet its Year 1 outcomes target(s)? How will this impact your action plan for the coming years?

We are pleased with the increase that we continue to see, year over year, with student proficiency across all grades and subjects. We know we will need to continue to see strong improvement to hit our lofty goal of 60% proficiency across all grades and subjects by 2030. Our action plan will continue to press on areas of academic rigor to push towards these steady increases over time.

**Prior Year Report:** What were the 2-3 major TISA investments you made in the prior year toward this goal? For each, please note the amount expended (rough estimate) and reflections on whether or not the investment contributed to progressing toward the goal or not, and how so.

- **Every Student Learns - \$351,400,000 (61%)**
  - School-based staffing model - \$336MM
    - Exceptional Education (Budget + Strategic Allocation) - \$55MM
    - Strategic Staffing Funds - \$39.1MM
- **Every Student Belongs - \$39,600,000 (7%)**
  - Sustained Personalization Staffing Positions - \$30MM
  - School Allocation Funds - \$2.3MM
- **Every School Equipped - \$92,200,000 (16%)**
  - Utilities \$15.9MM
  - School Safety and Security \$4.5MM
  - Hardware, Software, and Equipment \$7.7MM
  - Transportation \$28.5MM
- **Every Employee Valued – \$23,300,000 (4%)**
  - Differentiated Compensation \$14.5MM
    - Employee Stipends \$7.5MM
    - Hard to Staff Schools and Certifications \$7MM
  - Employee Benefits and Taxes \$116MM
- **Every Community Served - \$12,900,000 (2%)**
  - Specialized Program Staffing \$6.4MM
  - Family and Community Engagement \$1.2MM
  - Career and Technical Education \$1.4MM

Comprehensive investments in the areas of our strategic plan will continue to have an impact on progressing towards our goals.

**Action Plan:** List detailed action steps or strategies for the 2024-2025 school year to meet your annual target.

- High-quality curriculum materials
- Supplemental funding for schools
- RTI Teachers and tutoring supports
- Summer programming opportunities
- Supporting all HCS students to achieve
- Aligning measures of success

**Goal Statement 2:** 60% of students will meet or exceed the standard on all state assessments (TCAP) by 2030. (Baseline 2022 – 37.4%)

	<ul style="list-style-type: none"> <li>Delivering high-quality lessons with rigorous instructional materials</li> <li>Responding and intervening to students' needs</li> </ul>
<p><b>Budget Narrative:</b> Describe how your district intends to use their budget to execute the action steps and meet the stated goal.</p>	<p>Our budget will be a priority based budget aligned to the commitments, objectives, and strategies outlined in our strategic plan, Opportunity 2030.</p> <p>(See <a href="#">FY26 approved budget</a> highlights and executive summary)</p>

**Goal Statement 3:** 46% of our economically disadvantaged students will meet or exceed the standard on all state assessments (TCAP) by 2030. (Baseline 2022 – 18.4%)

Year	Annual Outcome Target(s)	Associated Metrics/Data
Year 1: 2023-2024 school year (Actuals)	19.6%	TCAP Results
Year 2: 2024-2025 school year (Actuals)	20.7%	
Year 3: 2025-2026 school year	30.3%	
Year 4: 2026-2027 school year	34.3%	
Year 5: 2027-2028 school year	38.2%	
<p><b>Reflection:</b> Did your district meet its Year 1 outcomes target(s)? How will this impact your action plan for the coming years?</p>	<p>We are pleased with the increase that we continue to see, year over year, with student proficiency across all grades and subjects. We know we will need to continue to see strong improvement to hit our lofty goal of 46% proficiency across all grades and subjects by 2030. Our action plan will continue to press on areas of academic rigor to push towards these steady increases over time.</p>	
<p><b>Prior Year Report:</b> What were the 2-3 major TISA investments you made in the prior year toward this goal? For each, please note the amount expended (rough estimate) and reflections on whether or not the investment contributed to progressing toward the goal or not, and how so.</p>	<ul style="list-style-type: none"> <li><b>Every Student Learns - \$351,400,000 (61%)</b> <ul style="list-style-type: none"> <li>School-based staffing model - \$336MM                             <ul style="list-style-type: none"> <li>Exceptional Education (Budget + Strategic Allocation) - \$55MM</li> <li>Strategic Staffing Funds - \$39.1MM</li> </ul> </li> </ul> </li> <li><b>Every Student Belongs - \$39,600,000 (7%)</b> <ul style="list-style-type: none"> <li>Sustained Personalization Staffing Positions - \$30MM</li> <li>School Allocation Funds - \$2.3MM</li> </ul> </li> <li><b>Every School Equipped - \$92,200,000 (16%)</b> <ul style="list-style-type: none"> <li>Utilities \$15.9MM</li> <li>School Safety and Security \$4.5MM</li> <li>Hardware, Software, and Equipment \$7.7MM</li> <li>Transportation \$28.5MM</li> </ul> </li> <li><b>Every Employee Valued – \$23,300,000 (4%)</b> <ul style="list-style-type: none"> <li>Differentiated Compensation \$14.5MM                             <ul style="list-style-type: none"> <li>Employee Stipends \$7.5MM</li> <li>Hard to Staff Schools and Certifications \$7MM</li> </ul> </li> <li>Employee Benefits and Taxes \$116MM</li> </ul> </li> <li><b>Every Community Served - \$12,900,000 (2%)</b> <ul style="list-style-type: none"> <li>Specialized Program Staffing \$6.4MM</li> <li>Family and Community Engagement \$1.2MM</li> <li>Career and Technical Education \$1.4MM</li> </ul> </li> </ul> <p>Comprehensive investments in the areas of our strategic plan will continue to have an impact on progressing towards our goals.</p>	

**Goal Statement 3:** 46% of our economically disadvantaged students will meet or exceed the standard on all state assessments (TCAP) by 2030. (Baseline 2022 – 18.4%)

<p><b>Action Plan:</b> List detailed action steps or strategies for the 2024-2025 school year to meet your annual target.</p>	<ul style="list-style-type: none"> <li>• High-quality curriculum materials</li> <li>• Supplemental funding for schools</li> <li>• RTI Teachers and tutoring supports</li> <li>• Student support coaches</li> <li>• Increased counselor and social worker supports.</li> <li>• Supporting all HCS students to achieve</li> <li>• Aligning measures of success</li> <li>• Delivering high-quality lessons with rigorous instructional materials</li> <li>• Responding and intervening to students' needs</li> </ul>
<p><b>Budget Narrative:</b> Describe how your district intends to use their budget to execute the action steps and meet the stated goal.</p>	<p>Our budget will be a priority based budget aligned to the commitments, objectives, and strategies outlined in our strategic plan, Opportunity 2030.</p> <p>(See <a href="#">FY26 approved budget</a> highlights and executive summary)</p>

**Goal Statement 4:** 20% of our K-2 students will score below the 25<sup>th</sup> percentile nationally by 2030. (Baseline 2022 – 34%)

Year	Annual Outcome Target(s)	Associated Metrics/Data
Year 1: 2023-2024 school year (Actuals)	35.3%	Screener Data
Year 2: 2024-2025 school year	47.1%	
Year 3: 2025-2026 school year	28%	
Year 4: 2026-2027 school year	26%	
Year 5: 2027-2028 school year	24%	
<p><b>Reflection:</b> Did your district meet its Year 1 outcomes target(s)? How will this impact your action plan for the coming years?</p>	<p>For the 2024-2025 school year, we made a strategic decision to switch the universal screener that we were using in K-2. This effectively reset our baseline. While our end target will not change, our targets for years 2025-2026 will adjust to ensure we know what metric we need to stay on pace for 20% of our students below the 25th percentile nationally by 2030.</p>	
<p><b>Prior Year Report:</b> What were the 2-3 major TISA investments you made in the prior year toward this goal? For each, please note the amount expended (rough estimate) and reflections on whether or not the investment contributed to progressing toward the goal or not, and how so.</p>	<ul style="list-style-type: none"> <li>• <b>Every Student Learns - \$351,400,000 (61%)</b> <ul style="list-style-type: none"> <li>○ School-based staffing model - \$336MM                             <ul style="list-style-type: none"> <li>▪ Exceptional Education (Budget + Strategic Allocation) - \$55MM</li> <li>▪ Strategic Staffing Funds - \$39.1MM</li> </ul> </li> </ul> </li> <li>• <b>Every Student Belongs - \$39,600,000 (7%)</b> <ul style="list-style-type: none"> <li>○ Sustained Personalization Staffing Positions - \$30MM</li> <li>○ School Allocation Funds - \$2.3MM</li> </ul> </li> <li>• <b>Every School Equipped - \$92,200,000 (16%)</b> <ul style="list-style-type: none"> <li>○ Utilities \$15.9MM</li> <li>○ School Safety and Security \$4.5MM</li> <li>○ Hardware, Software, and Equipment \$7.7MM</li> <li>○ Transportation \$28.5MM</li> </ul> </li> <li>• <b>Every Employee Valued – \$23,300,000 (4%)</b> <ul style="list-style-type: none"> <li>○ Differentiated Compensation \$14.5MM                             <ul style="list-style-type: none"> <li>▪ Employee Stipends \$7.5MM</li> <li>▪ Hard to Staff Schools and Certifications \$7MM</li> </ul> </li> <li>○ Employee Benefits and Taxes \$116MM</li> </ul> </li> <li>• <b>Every Community Served - \$12,900,000 (2%)</b> <ul style="list-style-type: none"> <li>○ Specialized Program Staffing \$6.4MM</li> <li>○ Family and Community Engagement \$1.2MM</li> </ul> </li> </ul>	

**Goal Statement 4: 20% of our K-2 students will score below the 25<sup>th</sup> percentile nationally by 2030. (Baseline 2022 – 34%)**

	<ul style="list-style-type: none"> <li>○ Career and Technical Education \$1.4MM</li> </ul> <p>Comprehensive investments in the areas of our strategic plan will continue to have an impact on progressing towards our goals.</p>
<p><b>Action Plan:</b> List detailed action steps or strategies for the 2024-2025 school year to meet your annual target.</p>	<ul style="list-style-type: none"> <li>● High-quality curriculum materials</li> <li>● Thriving Kindergarten toolkit</li> <li>● Literacy Now support initiatives in K-2 classrooms</li> <li>● RTI Teachers and tutoring supports</li> <li>● Supporting all HCS students to achieve</li> <li>● Aligning measures of success</li> <li>● Delivering high-quality lessons with rigorous instructional materials</li> <li>● Responding and intervening to students' needs</li> </ul>
<p><b>Budget Narrative:</b> Describe how your district intends to use their budget to execute the action steps and meet the stated goal.</p>	<p>Our budget will be a priority based budget aligned to the commitments, objectives, and strategies outlined in our strategic plan, Opportunity 2030.</p> <p>(See <a href="#">FY26 approved budget</a> highlights and executive summary)</p>

**Goal Statement 5: 27.8% of our economically disadvantaged K-2 students will score below the 25<sup>th</sup> percentile nationally by 2030. (Baseline 2022 – 50.8%)**

Year	Annual Outcome Target(s)	Associated Metrics/Data
Year 1: 2023-2024 school year (Actuals)	54.0%	Screener Data
Year 2: 2024-2025 school year	63.7%	
Year 3: 2025-2026 school year	39.3%	
Year 4: 2026-2027 school year	35.5%	
Year 5: 2027-2028 school year	31.6%	
<p><b>Reflection:</b> Did your district meet its Year 1 outcomes target(s)? How will this impact your action plan for the coming years?</p>	<p>For the 2024-2025 school year, we made a strategic decision to switch the universal screener that we were using in K-2. This effectively reset our baseline. While our end target will not change, our targets for years 2025-2026 will adjust to ensure we know what metric we need to stay on pace for 20% of our students below the 25th percentile nationally by 2030.</p>	
<p><b>Prior Year Report:</b> What were the 2-3 major TISA investments you made in the prior year toward this goal? For each, please note the amount expended (rough estimate) and reflections on whether or not the investment contributed to progressing toward the goal or not, and how so.</p>	<ul style="list-style-type: none"> <li>● <b>Every Student Learns - \$351,400,000 (61%)</b> <ul style="list-style-type: none"> <li>○ School-based staffing model - \$336MM                             <ul style="list-style-type: none"> <li>▪ Exceptional Education (Budget + Strategic Allocation) - \$55MM</li> <li>▪ Strategic Staffing Funds - \$39.1MM</li> </ul> </li> </ul> </li> <li>● <b>Every Student Belongs - \$39,600,000 (7%)</b> <ul style="list-style-type: none"> <li>○ Sustained Personalization Staffing Positions - \$30MM</li> <li>○ School Allocation Funds - \$2.3MM</li> </ul> </li> <li>● <b>Every School Equipped - \$92,200,000 (16%)</b> <ul style="list-style-type: none"> <li>○ Utilities \$15.9MM</li> <li>○ School Safety and Security \$4.5MM</li> <li>○ Hardware, Software, and Equipment \$7.7MM</li> <li>○ Transportation \$28.5MM</li> </ul> </li> <li>● <b>Every Employee Valued – \$23,300,000 (4%)</b> <ul style="list-style-type: none"> <li>○ Differentiated Compensation \$14.5MM                             <ul style="list-style-type: none"> <li>▪ Employee Stipends \$7.5MM</li> <li>▪ Hard to Staff Schools and Certifications \$7MM</li> </ul> </li> <li>○ Employee Benefits and Taxes \$116MM</li> </ul> </li> <li>● <b>Every Community Served - \$12,900,000 (2%)</b></li> </ul>	

<b>Goal Statement 5:</b> 27.8% of our economically disadvantaged K-2 students will score below the 25 <sup>th</sup> percentile nationally by 2030. (Baseline 2022 – 50.8%)	
	<ul style="list-style-type: none"> <li>○ Specialized Program Staffing \$6.4MM</li> <li>○ Family and Community Engagement \$1.2MM</li> <li>○ Career and Technical Education \$1.4MM</li> </ul> <p>Comprehensive investments in the areas of our strategic plan will continue to have an impact on progressing towards our goals.</p>
<b>Action Plan:</b> List detailed action steps or strategies for the 2024-2025 school year to meet your annual target.	<ul style="list-style-type: none"> <li>● High-quality curriculum materials</li> <li>● Thriving Kindergarten toolkit</li> <li>● Literacy NOW support initiatives in K-2 classrooms</li> <li>● RTI Teachers and tutoring supports</li> <li>● Supporting all HCS students to achieve</li> <li>● Aligning measures of success</li> <li>● Delivering high-quality lessons with rigorous instructional materials</li> <li>● Responding and intervening to students' needs</li> </ul>
<b>Budget Narrative:</b> Describe how your district intends to use their budget to execute the action steps and meet the stated goal.	<p>Our budget will be a priority based budget aligned to the commitments, objectives, and strategies outlined in our strategic plan, Opportunity 2030.</p> <p>(See <a href="#">FY26 approved budget</a> highlights and executive summary)</p>

<b>Public Comment</b>	
The TISA accountability report must be presented for public comment to parents, educators, and local community members prior to its submission to the department by November 1.	
Date(s) of opportunity for local public comment.	September 23rd – October 1st, 2025: Document plus open-ended survey sent out through community newsletter
Description of public comment opportunities (e.g. collection of written comments, public hearing, local board meeting discussion, etc.)	<p>Open-ended comment sent out through the community newsletter</p> <p>Opportunity to speak at public board meeting, October 9, 2025</p> <p>Opportunity to provide feedback on budget spending on staff and family pulse checks each month</p>
Summary of public comment received, if any.	•
Description of how your district did or did not incorporate public comment received into the final accountability report submission.	

**To:** Hamilton County Board of Education  
Dr. Justin Robertson, Superintendent

**From:** Dr. Zac Brown, Chief Talent Officer, Talent Department

**Date:** October 9, 2025

**Subject:** Request for new and updated job class description

**Board Agenda Category:**

- Consent Agenda
- Action Item
- Reports and Information

In alignment with policy 5.103 and 5.101, the following new and updated job class descriptions are presented to you for review. The updates include job descriptions being updated to reflect the current essential job responsibilities of existing job classes.

Job Class Descriptions:

Job Title	Purpose	Job Details
Position Control Analyst	The purpose of this classification is to ensure the accurate and timely processing, maintenance, and reconciliation of position control-related data within the district's financial and human resources systems. Under the supervisor of the Position Control Manager, this role plays a vital role in tracking authorized positions and aligning them with the district's budget and staffing plans.	Min \$50,154 260 days calendar Occupied as Budget Analyst
Position Control Manager	The purpose of this classification is to ensure the proper execution and accuracy of position control functions to support the efficient operation of the Budget and Human Capital Processes. The position will oversee daily operations, supervise and manage all position control functions, and partner with other stakeholders to develop staffing plans and budgets.	Min \$72,117 260 days calendar Occupied as Budget Specialist

Information Technology Generalist	The purpose of this classification is to support a wide range of IT-related technical tasks, including device management, systems management, cybersecurity, application development, and user support. This individual is regarded as a technical expert in various technology areas and assists across multiple disciplines and environments.	Min \$55,672 260 days calendar Occupied as Helpdesk Technician I
Procurement Specialist	The purpose of this classification is to assist the Director of Procurement in processing, management, and improvement of procurement functions.	Min \$62,907 260 days calendar Vacant – Previously Purchasing Agent Assistant
Risk Management Technician	The purpose of this classification is to administer risk management processes for Hamilton County Schools. This position exercises judgement and discretion in handling claims, overseeing student accident reporting, coordinating on-the-job injury cases, and engaging with third-party administrators (TPAs) and employees. This role proactively identifies, analyzes, and mitigates risk while recommending strategies to help reduce exposure, improve compliance and protect district assets. In addition to processing documentation, maintaining records, and providing administrative management pertaining to claims, complaints, and legal actions the risk management technician will investigate cases, analyze for acceptance or denial purposes, make the proper determination, and provide follow up.	Min \$50,154 260 days calendar Vacant – Budgeted FY26
Educational Diagnostician	The purpose of this classification is to provide assessment and evaluation services for preschool-age children to determine eligibility for special education services. This position works under the supervision of a licensed school psychologist. This position involves collaborating with families, educators, and specialists to develop Individualized Education Plans (IEPs) and ensures compliance with special education regulations.	Min \$50,000 201 days calendar Occupied

Title IX Coordinator	The purpose of this classification is to monitor the overall implementation of Title IX for the school district and coordinating the school district's compliance with Title IX, including the school district's grievance procedures for resolving associated complaints.	Min \$72,117 260 days calendar New Job Class
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Enclosure: Job Descriptions (7)

**Opportunity 2030 Commitment Connection**

- Every Student Learns
- Every Student Belongs
- Every School Equipped
- Every Employee Valued
- Every Community Served



## Job Description

Job Title:	<b>Position Control Analyst</b>		
Reports to:	<b>Manager</b>		
Job Class:	<b>V615</b>	FLSA Status:	<b>Non-Exempt</b>
<u>Pay Grade:</u>	<b>G (1012), Min \$50,154</b>	Position Certified:	<b>No</b>

*Hamilton County Schools has the right to revise this job description at any time and it does not in any way represent a contract of employment.*

### **Purpose of Job**

The purpose of this classification is to ensure the accurate and timely processing, maintenance, and reconciliation of position control-related data within the district's financial and human resources systems. Under the supervisor of the Position Control Manager, this role plays a vital role in tracking authorized positions and aligning them with the district's budget and staffing plans.

### **Primary Job Duties and Responsibilities**

*Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out but may be considered incidental in the performance of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the duties herein described.*

- Process and accurately enter position-related data into the district's ERP/HRIS system (e.g., creating new positions, modifying existing ones, inactivating positions).
- Ensure position attributes (e.g., department, location, funding source, FTE, salary schedule, job code) are correctly assigned and updated.
- Maintain meticulous records and documentation for all position changes and approvals.
- Review and process requests for position changes (e.g., transfers, reclassifications, additions, deletions) submitted by schools and departments.
- Verify that all required approvals and supporting documentation are complete and adhere to district policies and procedures.
- Communicate with requestors regarding status, missing information, or clarifications needed.
- Assist with regular audits and reconciliations of position control data against Human Resources and Payroll records to identify and resolve discrepancies.
- Investigate and resolve data inconsistencies, working collaboratively with HR and Payroll departments.
- Contribute to efforts to improve data quality and system accuracy.
- Assist the Position Control Manager in generating routine and ad-hoc reports related to staffing levels, vacancies, position status, and personnel costs.
- Provide data and analysis to support budget development and forecasting related to personnel.
- Serve as a primary point of contact for inquiries from school administrators, department heads, and other staff regarding position related information.
- Provide clear and accurate information and guidance on position control policies and processes.
- Assist with preparing documentation and responding to inquiries during internal and external audits.

- Complies with applicable district, state, and federal codes, laws, rules, regulations, standards, policies and procedures.
- Adheres to the Teacher Code of Ethics as defined by Tennessee Law and Code of Professional Conduct as defined by Board Policy 5.6011.
- Acts in a professional, respectful, and welcoming manner at all times.
- Creates a customer-focused climate and provides quality services and support to schools, community, businesses, Superintendent of Schools, Board of Education, and other stakeholders.
- Maintains confidentiality.
- Performs other related duties as assigned.

### **Education, Experience, and Qualifications**

*Salary is based on a combination of relevant education and experience.*

- Bachelor's degree in Finance, Business Administration, Human Resources, Public Administration, or related field required.
- Two (2) years of experience in budgeting, financial operations, HR analytics, position control, or related work experience required;
- Or any equivalent combination of education, training, and experience that provides the required knowledge, skills, and abilities for this job.
- Experience in K-12 public school district preferred.

### **Knowledge, Skills, and Abilities**

- Knowledge of Tennessee public school finance and staffing regulations.
- Skilled in analyzing data and solving problems with a high level of accuracy and attention to detail.
- Knowledge of advanced Microsoft Excel functions, including pivot tables and VLOOKUP.
- Ability to manage time effectively, prioritize tasks, and meet deadlines independently and collaboratively.
- Skilled in written and verbal communication across diverse audiences.

**Physical Requirements**

*In compliance with the Americans with Disabilities Act, the Board of Education will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.*

ACTIVITY	FREQUENCY				ACTIVITY	FREQUENCY			
	N	O	F	C		N	O	F	C
<b>Lift/Carry:</b>					Twist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Turn (pivot)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Climb	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21-50 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Crawl	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
51-100 lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Above	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100+ lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Outward	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Push/Pull:</b>					Fine Motor Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Stand	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
21-50 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
51-100 lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100+ lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Squat	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					Kneel	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drive	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Automatic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Type/Keyboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Standard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Key:</b>									
<b>N</b> = Never (0% of time); <b>O</b> = Occasional (1-33% of time); <b>F</b> = Frequent (34-66% of time); <b>C</b> = Constant (67-100% of time).									

*Hamilton County Schools is an Equal Opportunity employer and actively seeks to recruit and retain a diverse workforce that reflects the diversity of our student population and community. HCS does not discriminate on the basis of race, creed, color, sexual orientation, gender identity, religion, age, national origin, genetic information, individuals with disabilities, or veteran status with regard only for qualifications for the positions involved.*



## Job Description

Job Title:	<b>Budget Analyst</b>		
Reports to:	<b>Director</b>		
Job Class:	<b>V184</b>	FLSA Status:	<b>Non-Exempt</b>
<u>Pay Grade:</u>	<b>F (1010)</b>	Position Certified:	<b>No</b>

*Hamilton County Schools has the right to revise this job description at any time and it does not in any way represent a contract of employment.*

### **Purpose of Job**

The purpose of this classification is to conduct budget, accounting, and financial activities, including position control, budget preparation, budget administration, general accounting, financial reporting, maintenance of records, and other financial activities.

### **Primary Job Duties and Responsibilities**

*Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out but may be considered incidental in the performance of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the duties herein described.*

- Logs and screens position control requests for accuracy, completeness, and conformity to established processes.
- Creates and updates positions in the enterprise system.
- Communicates with appropriate stakeholders to coordinate necessary activities to process position Control requests.
- Works to maintain position compliance with approved budgets for Hamilton County Schools including utilizing accurate account, job class, location and other applicable codes.
- Serves as backup for Position Control Manager.
- Processes a variety of documentation associated with department operations within designated timeframes and per established procedures.
- Maintains compliance with Generally Accepted Accounting Principles (GAAP) and all other applicable codes, laws, rules, regulations, standards, policies and procedures; initiates any actions necessary to correct deviations or violations.
- Prepares budget documents, charts, and graphs; prepares spreadsheets and monitors salary expenses for system personnel; assists in making budgetary projections; maintains database and history of budget information; downloads information from mainframe system to personal computer database; requests reports from systems for monthly budget updates.
- Assists with information needed to prepare annual budget documentation for presentation to School Board, County Commissioners, and the public; updates revenue analysis needed for budget presentation and other items needed for budget process.
- Ensures accuracy in budgeting and reporting to the State Department of Education.

- Analyzes department accounts.
- Assists with budget maintenance which includes budget amendments, budget requests, and account code requests.
- Prepares a variety of financial reports; assists with preparation of various state and federal reports, including the Annual Financial Report; prepares monthly School Board financial statements; compiles statistical and administrative data for reports; researches data and makes applicable calculations; distributes monthly financial reports and explanations to various individuals, departments, or outside agencies.
- Prepares and maintains a list of account approvers for internal control purposes.
- Provides support for system users on monthly accounting reports; meets periodically with users to review budget items, accounts, and year-to-date activity.
- Assists with the year-end closing process.
- Maintains file system of various files/records; prepares and sets up files; sorts/organizes documents to be filed; files documents in designated order; retrieves/replaces files; coordinates maintenance/retention of records in accordance with guidelines governing records retention.
- Manages staffing model components, ensuring supplemental funding aligns with school allocations and leadership approvals, while reviewing staffing models and budget sheets for accuracy and necessary adjustments.
- Oversees Exceptional Education position management, ensuring compliance with federal funding requirements.
- Handles positions tied to federal programs and grants, verifying appropriate job posting funding.
- Identifies and corrects personnel changes, ensuring employee pay is accurately allocated to budget lines.
- Leads special projects as assigned, reporting to the Director of Budget and collaborating with the Budget Specialist/Position Control Manager.
- Provides assistance to other employees or departments as needed.
- Protects confidentiality of employee and financial records and information.
- Understands and follows oral and written directives accurately, timely, and with a positive attitude.
- Ensures accuracy of input and output data.
- Participates in professional development.
- Communicates with supervisor, employees, other departments, school system officials, school officials/staff, teachers, parents/families, students, vendors, the public, outside agencies, and other individuals as needed to coordinate work activities, review status of work, exchange information, or resolve problems.
- Communicates through the proper channels to keep supervisor and other appropriate personnel informed of impending problems or events of unusual nature.
- Prepares or completes various documents, reports, and correspondence, invoices, financial statements, spreadsheets, graphs, charts, tax reports/forms, or other documents as required.
- Operates a computer to enter, retrieve, review or modify data; performs data entry functions by keying data into computer system; verifies accuracy of entered data and makes corrections; utilizes word processing, spreadsheet, database, payroll, financial, presentation, Internet, email, or other computer programs; performs basic maintenance of office/computer equipment, such as backing up data or replacing paper, toner, or ribbons; coordinates service/repair activities as needed.
- Complies with applicable district, state, and federal codes, laws, rules, regulations, standards, policies and procedures.
- Adheres to the Teacher Code of Ethics as defined by Tennessee Law and Code of Professional Conduct as defined by Board Policy 5.6011.
- Acts in a professional, respectful, and welcoming manner at all times.

- Creates a customer-focused climate and provides quality services and support to schools, community, businesses, Superintendent of Schools, Board of Education, and other stakeholders.
- Works collaboratively with all stakeholders.
- Maintains confidentiality.
- Attends work and arrives to work on time.
- Performs other related duties as assigned.

### **Education, Experience, and Qualifications**

*Salary is based on a combination of relevant education and experience.*

- Associate's degree in a related field;
- Two (2) years of related work experience;
- Or any equivalent combination of education, training, and experience that provides the required knowledge, skills, and abilities for this job.
- Bachelor's degree in Accounting, Business Administration, or closely related field strongly preferred.

### **Knowledge, Skills, and Abilities**

- Demonstrate excellent verbal and written communication skills.
- Demonstrate excellent planning, organizational, problem-solving, decision-making, and time management skills with a proven ability to meet deadlines.
- Excellent interpersonal, negotiation, and conflict resolution skills.
- Strong analytical and problem-solving skills.
- Ability to prioritize tasks and to delegate them when appropriate.
- Ability to act with integrity, professionalism, and confidentiality.
- Proficiency with or the ability to quickly learn the organization's HRIS and applicant tracking systems.

**Physical Requirements**

*In compliance with the Americans with Disabilities Act, the Board of Education will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.*

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21-50 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Crawl	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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21-50 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sit	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
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Drive	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Automatic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Type/Keyboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Standard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Key:</b>									
N = Never (0% of time); O = Occasional (1-33% of time); F = Frequent (34-66% of time); C = Constant (67-100% of time).									

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## Job Description

Job Title:	<b>Position Control Manager</b>		
Reports to:	<b>Chief Financial Officer</b>		
Job Class:	<b>P300</b>	FLSA Status:	<b>Exempt</b>
<u>Pay Grade:</u>	<b>K (2001), Min \$72,117</b>	Position Certified:	<b>No</b>

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### **Purpose of Job**

The purpose of this classification is to ensure the proper execution and accuracy of position control functions to support the efficient operation of the Budget and Human Capital Processes. The position will oversee daily operations, supervise and manage all position control functions, and partner with other stakeholders to develop staffing plans and budgets.

### **Primary Job Duties and Responsibilities**

*Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out but may be considered incidental in the performance of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the duties herein described.*

- Manage and maintain the district's position control system, accurately tracking and managing all authorized positions (FTEs) and ensure alignment with approved organizational charts.
- Collaborate with Human Resources to ensure seamless integration of position control data with hiring, onboarding, and employee record management.
- Review and process requests for new positions, reclassifications, and changes, ensuring alignment with approved budgets and district staffing plans.
- Maintain documentation supporting all position control decisions and modifications
- Conduct regular audits and reconciliations of position control data against payroll and HR records to maintain data integrity and identify discrepancies.
- Develop and implement and enforce policies and procedures for position control, ensuring compliance with state and federal regulations, local board policies, and best practices.
- Assist in the development and preparation of the district's annual personnel budget, collaborating with department heads and school leaders.
- Prepare detailed budget projections for personnel expenses, including salary, benefits, and associated costs
- Monitor and track personnel expenditures against approved budgets, identifying variances and providing insights to District Leadership.
- Ensure proper budget coding for all personnel actions and maintain accurate financial records.
- Collaborate with Finance staff to ensure position control aligns with available funding sources.
- Generate comprehensive reports on position control, staffing levels, and personnel expenditures for internal and external reporting needs.
- Assist with internal and external audits related to position control and personnel budgets, providing necessary documentation.

- Direct and supervise position control staff, providing guidance on complex classification and budget issues.
- Establish and maintain standard operating procedures for position control processes
- Train district staff on position control policies and procedures
- Collaborate with district leadership on strategic staffing decisions.
- Complies with applicable district, state, and federal codes, laws, rules, regulations, standards, policies and procedures.
- Adheres to the Teacher Code of Ethics as defined by Tennessee Law and Code of Professional Conduct as defined by Board Policy 5.6011.
- Acts in a professional, respectful, and welcoming manner at all times.
- Creates a customer-focused climate and provides quality services and support to schools, community, businesses, Superintendent of Schools, Board of Education, and other stakeholders.
- Works collaboratively with all stakeholders.
- Maintains confidentiality.
- Performs other related duties as assigned.

### **Education, Experience, and Qualifications**

*Salary is based on a combination of relevant education and experience.*

- Bachelor's degree in Finance, Business Administration, Human Resources, Public Administration, or related field required.
- Five (5) years of experience in budgeting, financial operations, HR analytics, position control, or related work experience required;
- Or any equivalent combination of education, training, and experience that provides the required knowledge, skills, and abilities for this job.
- Master's degree in Public Administration, Business, or Education Leadership preferred.
- Experience in K-12 public school district and managing grants/restricted funding for personnel desired.

### **Knowledge, Skills, and Abilities**

- Knowledge of Tennessee public school finance and staffing regulations.
- Skilled in written and verbal communication across diverse audiences.
- Ability to manage time effectively, prioritize tasks, and meet deadlines independently and collaboratively.
- Skilled in using Microsoft Excel and other data analysis tools at an advanced level to support decision-making and reporting.
- Knowledge of financial management systems (ERP/HRIS), with the ability to navigate and utilize position control modules effectively.

**Physical Requirements**

*In compliance with the Americans with Disabilities Act, the Board of Education will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.*

ACTIVITY	FREQUENCY				ACTIVITY	FREQUENCY			
	N	O	F	C		N	O	F	C
<b>Lift/Carry:</b>					Twist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Turn (pivot)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Climb	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21-50 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Crawl	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
51-100 lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Above	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100+ lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Outward	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Push/Pull:</b>					Fine Motor Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Stand	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
21-50 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
51-100 lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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					Kneel	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drive	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Automatic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Type/Keyboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Standard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Key:</b>									
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## Job Description

Job Title:	<b>Budget Specialist</b>		
Reports to:	<b>Director of Budget</b>		
Job Class:	<b>V185</b>	FLSA Status:	<b>Exempt</b>
<u>Pay Grade:</u>	<b>J (1014)</b>	Position Certified:	<b>No</b>

*Hamilton County Schools has the right to revise this job description at any time and it does not in any way represent a contract of employment.*

### **Purpose of Job**

The purpose of this classification is to assist in preparing the annual budget and related documentation for presentation to the School Board, County Commissioners, and other stakeholders. It coordinates and monitors Position Control and revises budget throughout the year. It analyzes activity and supports departments in managing their budgets.

### **Primary Job Duties and Responsibilities**

*Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out but may be considered incidental in the performance of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the duties herein described.*

- Supports the preparation and monitoring of annual budget and amending if needed.
- Maintains the general ledger, including coordinating with IT in setting up new accounts, background parts, system security, etc.
- Prepares spreadsheets, journal entries, and other documentation for year-end closing and ACFR, and master file for position control.
- Manages reporting of information in State and County systems.
- Establishes position distribution codes, regulation codes, and account codes for all personnel, enabling HR to set up employees.
- Oversees position control operations, ensuring staffing, personnel management, and compensation matters align with the general-purpose budget while verifying funding availability before job postings and assigning salary account codes.
- Serves as a liaison to Human Resources, supervising the Position Control team, delegating tasks, coordinating responsibilities, and providing guidance on staffing and budget-related issues.
- Collaborates with HR, Finance, and other department to create and maintain necessary processes for administration of position control.
- Collaborates with departments to develop and refine policies and procedures for daily operations and fiscal year transitions.
- Monitors strategic staffing budgets, ensuring compliance, tracking position and personnel data, and reviewing budget amendment requests with summaries and recommendations for CFO approval.

- Compiles regular reports to ensure accuracy in accounts and FTE, coordinating with departments as needed throughout the year.
- Researches and compiles statistical and administrative data for State and other reports.
- Communicates and collaborates with department managers and others in establishing and maintaining budgets to meet board and state requirements, and governmental accounting standards.
- Complies with accounting and financial policies and procedures, as well as all other Board policies.
- Maintains a comprehensive, current knowledge of applicable laws, regulations, and standards; maintains an awareness of new trends and advances in the profession.
- Attends meetings and trainings as needed.
- Travels to school locations and other locations throughout the district to perform job duties.
- Prepares or completes various documents, reports, and correspondence as required.
- Complies with applicable district, state, and federal codes, laws, rules, regulations, standards, policies and procedures.
- Adheres to the Teacher Code of Ethics as defined by Tennessee Law.
- Acts in a professional, respectful, and welcoming manner at all times.
- Creates a customer-focused climate and provides quality services and support to schools, community, businesses, Superintendent of Schools, Board of Education, and other stakeholders.
- Works collaboratively with all stakeholders.
- Follows established procedures to ensure assigned areas are safe.
- Maintains confidentiality.
- Attends work and arrives to work on time.
- Performs other related duties as assigned.

### **Education, Experience, and Qualifications**

*Salary is based on a combination of relevant education and experience.*

- Bachelor's degree in accounting or closely related field required;
- Five (5) years previous experience in a financial services role;
- Or any equivalent combination of education, training, and experience that provides the required knowledge, skills, and abilities for this job.
- Master's degree preferred.

### **Knowledge, Skills, and Abilities**

- Ability to perform addition, subtraction, multiplication, and division. Ability to calculate decimals and percentages.
  - Demonstrate excellent verbal and written communication skills to deal effectively with students, educators, parents, and community members.
  - Demonstrate excellent planning, organizational, problem-solving, decision-making, and time management skills.
  - Strong analytical and problem-solving skills.
  - Ability to prioritize tasks and to delegate them when appropriate.
  - Ability to act with integrity, professionalism, and confidentiality.
-

**Physical Requirements**

*In compliance with the Americans with Disabilities Act, the Board of Education will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.*

ACTIVITY	FREQUENCY				ACTIVITY	FREQUENCY			
	N	O	F	C		N	O	F	C
<b>Lift/Carry:</b>					Twist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Turn (pivot)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Climb	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21-50 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Crawl	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
51-100 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Above	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100+ lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Outward	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Push/Pull:</b>					Fine Motor Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Stand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
21-50 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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					Kneel	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drive	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Automatic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Type/Keyboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Standard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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## Job Description

Job Title:	<b>Information Technology Generalist</b>		
Reports to:	<b>Manager</b>		
Job Class:	<b>V614</b>	FLSA Status:	<b>Non-Exempt</b>
<u>Pay Grade:</u>	<b>H (1014), Min \$55,672.50</b>	Position Certified:	<b>No</b>

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### Purpose of Job

The purpose of this classification is to support a wide range of IT-related technical tasks, including device management, systems management, cybersecurity, application development, and user support. This individual is regarded as a technical expert in various technology areas and assists across multiple disciplines and environments.

### Primary Job Duties and Responsibilities

*Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out but may be considered incidental in the performance of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the duties herein described.*

- Supports setup, configuration, maintenance, of computer devices, systems, and servers.
- Diagnoses and resolve both hardware and software related technical issues for users.
- Installs, upgrades, and manages software applications.
- Develops applications for deployment across the district.
- Performs routine maintenance checks and repairs on computer hardware.
- Assists with data and network security, implement protocols, while adhering to IT policies and regulations.
- Creates and maintains technical documentation, user guides, and provides training to users.
- Participates in IT projects, including planning, implementation, and testing.
- Researches and recommends innovative, and where possible, automated approaches for system administration tasks. Identifies approaches that leverage HCDE resources and provide economies of scale.
- Monitors efficiency and effectiveness of district servers and make recommendations to improve quality of service to stakeholders.
- Consistently achieves goals assigned by the manager; alerts manager to problems/issues that may interfere with accomplishing goals; works collaboratively with manager and stakeholders to resolve issues so that goals are accomplished.
- Installs new/rebuilds of existing district level servers and configure hardware, peripherals, services, settings, directories, storage, etc. in accordance with standards and project/operational requirements.
- Assists with maintenance and upgrade of current district level servers
- Supports daily system monitoring, verifies integrity and availability of all hardware, server resources, systems and key processes, reviews system and application logs, and verifies completion of scheduled jobs such as backups. Identifies causes of interruption of services to schools and departments and promptly addresses issues.

- Assists with daily replication and backup operations, ensuring all required file systems and system data are successfully backed up to the appropriate media.
- Assists with application of OS patches and upgrades on a regular basis and upgrades administrative tools and utilities. Configures / adds new services as necessary.
- Assists with support and maintenance of the district email servers.
- Assists with maintenance of the data center environmental and monitoring equipment.
- Performs ongoing performance tuning, hardware upgrades, and resource optimization as required. Configures CPU, memory, and disk partitions.
- Assists with tracking of annual maintenance renewal of equipment and software for district servers.
- Work evenings and weekends, sometimes with little advanced notice, to resolve problems.
- May operate a motor vehicle to conduct various work activities.
- Complies with applicable district, state, and federal codes, laws, rules, regulations, standards, policies, and procedures.
- Adheres to the Teacher Code of Ethics as defined by Tennessee Law and Code of Professional Conduct as defined by Board Policy 5.6011.
- Acts in a professional, respectful, and welcoming manner at all times.
- Creates a customer-focused climate and provides quality services and support to schools, community, businesses, Superintendent of Schools, Board of Education, and other stakeholders.
- Maintains confidentiality.
- Performs other related duties as assigned.

### **Education, Experience, and Qualifications**

*Salary is based on a combination of relevant education and experience.*

- High School Diploma or equivalent required.
- Five (5) years of experience in general IT support capacity.
- Or any equivalent combination of education, training, and experience that provides the required knowledge, skills, and abilities for this job.
- Must maintain a valid state issued driver's license.
- Bachelor's degree and or vocational/technical training in computer systems preferred.
- Certifications in Microsoft and VmWare preferred.

### **Knowledge, Skills, and Abilities**

- Ability to operate machinery, equipment, and tools with sufficient manual dexterity.
- Ability to resolve complex problems while maintaining a high standard of customer service.

**Physical Requirements**

*In compliance with the Americans with Disabilities Act, the Board of Education will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.*

ACTIVITY	FREQUENCY				ACTIVITY	FREQUENCY			
	N	O	F	C		N	O	F	C
<b>Lift/Carry:</b>					Twist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Turn (pivot)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Climb	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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51-100 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Above	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100+ lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Outward	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Push/Pull:</b>					Fine Motor Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Stand	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
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					Kneel	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drive	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Automatic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Type/Keyboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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## Job Description

Job Title:	<b>Helpdesk Technician 1</b>		
Reports to:	<b>Coordinator Information Technology</b>		
Job Class:	<b>V290</b>	FLSA Status:	<b>Non-Exempt</b>
<a href="#">Pay Grade:</a>	<b>1005</b>	Position Certified:	<b>No</b>

*Hamilton County Schools has the right to revise this job description at any time and it does not in any way represent a contract of employment.*

### **Purpose of Job**

The purpose of this classification is to provide remote technical assistance and support related to computer systems, hardware, or software for district end-users with continual supervision.

### **Primary Job Duties and Responsibilities**

*Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out but may be considered incidental in the performance of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the duties herein described.*

- Provides technical assistance and support for incoming calls and emails related to computer systems, software, and hardware.
- Maintains daily performance of computer systems.
- Asks questions to determine the nature of submitted problems.
- Troubleshoots, analyzes, diagnoses, and works to resolve/repair problems involving operating systems, hardware, software, peripheral, or network problems.
- Develops and maintains procedural instructions and documentation. Explains instructions to users in a step-by-step manner to resolve problems.
- Guides users through the problem-solving process.
- Cleans up computers and configures new user computers.
- Installs computer peripherals for users.
- Follows up with users to ensure the issue has been resolved.
- Maintains helpdesk system and assigns tickets to technicians where an onsite visit is required.
- Performs remote troubleshooting through diagnostic techniques and pertinent questions.
- Writes training documents.
- Trains computer users and develops technical proficiency.
- Researches the costs of repairs or replacement of computers, peripherals, or components.
- Assists in inventory/asset management.
- Administers user and device accounts through Active Directory, Google Workspace, and Microsoft System Center.
- Attends meetings as needed.
- Prepares or completes various documents, reports, and correspondence as required.

- Complies with applicable district, state, and federal codes, laws, rules, regulations, standards, policies and procedures.
- Adheres to the Teacher Code of Ethics as defined by Tennessee Law.
- Acts in a professional, respectful, and welcoming manner at all times.
- Creates a customer-focused climate and provides quality services and support to schools, community, businesses, Superintendent of Schools, Board of Education, and other stakeholders.
- Works collaboratively with all stakeholders.
- Follows established procedures to ensure assigned areas are safe.
- Maintains confidentiality.
- Attends work and arrives to work on time.
- Performs other related duties as assigned.

### **Education, Experience, and Qualifications**

*Salary is based on a combination of relevant education and experience.*

- High School diploma or equivalent;
- One (1) year of previous experience and/or training involving computer hardware maintenance;
- Or any equivalent combination of education, training, and experience that provides the required knowledge, skills, and abilities for this job.

### **Knowledge, Skills, and Abilities**

- Basic working knowledge and experience in Windows, IOS, Mac OS, and Chrome preferred.
- Ability to ask appropriate questions and gather information to determine the problem.
- Ability to analyze information to resolve problems.
- Ability to clearly explain how to resolve problems in a step-by-step manner.
- Sufficient manual dexterity to operate machinery, equipment, and tools.

**Physical Requirements**

*In compliance with the Americans with Disabilities Act, the Board of Education will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.*

ACTIVITY	FREQUENCY				ACTIVITY	FREQUENCY			
	N	O	F	C		N	O	F	C
<b>Lift/Carry:</b>					Twist	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Turn (pivot)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Climb	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21-50 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Crawl	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
51-100 lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Above	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
100+ lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Outward	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Push/Pull:</b>					Fine Motor Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Stand	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
21-50 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
51-100 lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bend	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
100+ lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Squat	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					Kneel	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drive	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Automatic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Type/Keyboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Standard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Key:</b>									
N = Never (0% of time); O = Occasional (1-33% of time); F = Frequent (34-66% of time); C = Constant (67-100% of time).									

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## Job Description

Job Title:	<b>Procurement Specialist</b>		
Reports to:	<b>Director</b>		
Job Class:	<b>V441</b>	FLSA Status:	<b>Non-Exempt</b>
<u>Pay Grade:</u>	<b>J (1014), Min \$62,907</b>	Position Certified:	<b>No</b>

*Hamilton County Schools has the right to revise this job description at any time and it does not in any way represent a contract of employment.*

### **Purpose of Job**

The purpose of this classification is to assist the Director of Procurement in processing, management, and improvement of procurement functions.

### **Primary Job Duties and Responsibilities**

*Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out but may be considered incidental in the performance of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the duties herein described.*

- Researches, reviews and clarifies procurement requests submitted by operating departments and schools to ensure completeness. Ensures compliance with the Tennessee Code Annotated as well as HCDE procurement standards, in regard to commodities, work services, and professional services.
- Maintains an up-to-date understanding of procurement regulations and procedures, including Federal, State, Local, School Board, internal, and industry-specific laws, regulations, policies, and guidelines.
- Analyzes current processes at the system level for improvements and efficiencies.
- Coordinate and trains on financial computer hardware/software; troubleshoots purchasing related system concerns; participates in software upgrades to the extent necessary to ensure successful procurement performance through designated systems.
- Creates project plans that support large-scale business decisions for the school system related to the functions of the Procurement department.
- Coordinates and manages the planning, developing, and implementing of programs, policies, and procedures for areas assigned to Procurement to support the most effective utilization of resources to support the vision and mission of the school district.
- Coordinates daily work activities; organizes priorities and assigns work; monitors status of work in progress and inspected completed work; consults with staff, assistants with complex problem situations, and provides technical guidance and expertise to address problems in assigned area.
- Processes all employee expense claims submitted ensuring compliance with District, State, and Federal policies and procedures.
- Consults with Chiefs, Community Superintendents and/or Directors, State Department of Education, school officials, and other officials to review operations/activities, review/resolve problems, receive advice/direction, and provide recommendations.
- Enters Procurement department requisitions and receiving records.

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- Complete department related purchasing functions and supply ordering.
  - Monitors and updates departmental calendars for all applicable due dates and notices.
  - Supports department updates to the Hamilton County School internet and sharepoint sites.
  - Audits invoices and purchase orders upon request from the Accounts Payable Department to ensure accuracy.
  - Reviews purchase requests, verify price quotes and supplemental documentation. Creates purchase orders, sends them to the Purchasing Agent for final evaluation and approval.
  - Advises and provides technical assistance to staff in operating departments and schools on procurement policies and procedures, as well as State and Federal procurement laws.
  - Fulfills records requests in compliance with state regulations.
  - Maintains file system for procurement documentation, contracts, reimbursements, and reports.
  - Serves as a general office contact for customer support functions related to all procurement departments.
  - Prepares a variety of reports of statistical data and submits to departments, individuals, or outside agencies.
  - Assists accounts payable in researching and resolving discrepancies.
  - Communicates through the proper channels to keep supervisor and other appropriate personnel informed of impending problems or events of unusual nature.
  - Prepares or completes various documents, reports, and correspondence as required.
  - Performs general/clerical tasks, which may include answering telephone calls, typing documents, making copies, sending/receiving faxes, filing documentation, processing incoming/outgoing mail, or running errands.
  - Operates a computer to enter, retrieve, review or modify data; verifies accuracy of entered data and makes corrections; operates general office/school equipment.
  - Complies with applicable district, state, and federal codes, laws, rules, regulations, standards, policies and procedures.
  - Adheres to the Teacher Code of Ethics as defined by Tennessee Law and Code of Professional Conduct as defined by Board Policy 5.6011.
  - Acts in a professional, respectful, and welcoming manner at all times.
  - Creates a customer-focused climate and provides quality services and support to schools, community, businesses, Superintendent of Schools, Board of Education, and other stakeholders.
  - Works collaboratively with all stakeholders.
  - Follows established procedures to ensure assigned areas are safe.
  - Maintains confidentiality.
  - Attends work and arrives at work on time.
  - Performs other related duties as assigned.

### **Education, Experience, and Qualifications**

*Salary is based on a combination of relevant education and experience.*

- Bachelor's degree in business management or related field required;
- Four (4) years previous work experience involving purchasing, procurement, project management, or related field;
- Or any equivalent combination of education, training, and experience that provides the required knowledge, skills, and abilities for this job.
- CPPO, CPPB, CPM, PMP, PgMP, CAPM, and/or comparable procurement – project management certifications highly desirable.

### **Knowledge, Skills, and Abilities**

- Ability to communicate effectively, both verbally and in writing, with internal and external stakeholders.
- Skilled in building and maintaining professional relationships, demonstrating strong interpersonal and customer service capabilities.
- Skilled in organizing and managing multiple priorities, with strong attention to detail and accuracy.
- Ability to manage time efficiently and meet established deadlines in a fast-paced environment.
- Skilled in analyzing data and solving problems, using sound judgment and critical thinking.
- Ability to prioritize tasks effectively and delegate responsibilities when appropriate to ensure workflow efficiency.
- Knowledge of procurement processes, project lifecycles, or the ability to quickly learn and adapt to specific product or service requirements.
- Skilled in using Microsoft Office Suite (Word, Excel, Outlook, PowerPoint) or equivalent software tools to support procurement activities.

**Physical Requirements**

*In compliance with the Americans with Disabilities Act, the Board of Education will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.*

ACTIVITY	FREQUENCY				ACTIVITY	FREQUENCY			
	N	O	F	C		N	O	F	C
<b>Lift/Carry:</b>					Twist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Turn (pivot)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Climb	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21-50 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Crawl	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
51-100 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Above	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100+ lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Outward	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Push/Pull:</b>					Fine Motor Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Stand	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
21-50 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
51-100 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100+ lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Squat	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
					Kneel	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drive	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Automatic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Type/Keyboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Standard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Key:</b>									
<b>N</b> = Never (0% of time); <b>O</b> = Occasional (1-33% of time); <b>F</b> = Frequent (34-66% of time); <b>C</b> = Constant (67-100% of time).									

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## Job Description

Job Title:	<b>Risk Management Technician</b>		
Reports to:	<b>Risk Manager</b>		
Job Class:	<b>V475</b>	FLSA Status:	<b>Non-Exempt</b>
<u>Pay Grade:</u>	<b>F (1010)</b>	Position Certified:	<b>No</b>

*Hamilton County Schools has the right to revise this job description at any time and it does not in any way represent a contract of employment.*

### **Purpose of Job**

The purpose of this classification is to assist the Risk Manager with the risk management processes in Hamilton County Schools. In addition to processing documentation, maintaining records, and providing administrative management pertaining to claims, complaints, and legal actions the risk management technician will investigate cases, analyze for acceptance or denial purposes, and provide follow up.

### **Primary Job Duties and Responsibilities**

*Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out but may be considered incidental in the performance of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the duties herein described.*

- Administers risk and claims management system; reviews, monitors, and makes recommendations to the Risk Manager on all claims, complaints, and lawsuits pertaining to job-related injury benefits (OJI) for certified and non-certified employees, automobile liability for system and contracted bus drivers, general/public liability, tort and non-tort liability, contractual liability, property lease liability, auto liability, Errors and Omissions Insurance, third-party subrogation, property insurance, student injury complaints/claims, and surveillance, case management, and loss control activities.
- Investigates risk management claims, analyzes cases for acceptance or denial purposes, provides field follow up when needed, and presents recommendations to Risk Manager.
- Demonstrates sound decision making throughout the risk management process.
- Organizes and prioritizes daily work activities, monitoring status of work in progress, confers with primary care providers, case management, third-party vendors, and with management regarding complex/problem situations.
- Processes a variety of documentation associated with department operations, within designated timeframes and per established procedures; distributes documentation or retains records as appropriate.
- Enters all claim, lawsuit, insurance, self-funding, third party provider and claimant contact information into risk management information system (RMIS); maintains database and files of claims, complaints, and lawsuits filed against Hamilton County Board of Education and Hamilton County Department of Education; maintains original files pertaining to on-the-job injuries (OJI), vehicle claims, property claims, public liability, student injury, tort, non-tort, or other claims.
- Interacts with employees, insurance providers, and the public to obtain information, maintain control of claims, resolve complaints, minimize claims and protect HCDE public image.

- Maintains contact with all employees who are absent from work due to on-the-job injuries (OJI); monitors employee OJI medical appointments and treatment; monitors return-to-work status of employees who are absent due to OJI and coordinates return to work; identifies, recommends, initiates, and monitors case management activities per protocols; identifies, recommends and assists in the implementation of loss control opportunities.
- Coordinates processing and payment of all claims to assure cost-effective resolution and prompt closure of claims.
- Obtains various forms, reports, correspondence, claims, injury reports, vehicle accident reports, police reports, complaints, lawsuits, interrogatories, legal correspondence, court documents, medical reports, medical records, laboratory reports, medical invoices/receipts, insurance forms, attendance records, policies, procedures, contracts, lease agreements, standard forms, codes, regulations, manuals, reference materials, or other documentation; reviews, completes, processes, forwards or retains as appropriate.
- Communicates with supervisor, departmental consultants, employees, other departments, school system officials, students, parents, claimants, medical providers, attorneys, court officials, insurance companies, regulatory agencies, outside agencies, the public, and other individuals as needed to coordinate work activities, review status of work, exchange information, or resolve problems.
- Performs duties as assigned by direct and departmental management.
- Communicates through the proper channels to keep supervisor and other appropriate personnel informed of impending problems or events of unusual nature.
- Attends meetings as needed.
- Travels to school locations and other locations throughout the district to perform job duties.
- Prepares or completes various documents, reports, and correspondence, logs, claims reports, statistical reports, presentations, or other documents as required. Designs, produces, and distributes risk management analyses and reports using RMIS.
- Complies with applicable district, state, and federal codes, laws, rules, regulations, standards, policies and procedures.
- Adheres to the Teacher Code of Ethics as defined by Tennessee Law.
- Acts in a professional, respectful, and welcoming manner at all times.
- Creates a customer-focused climate and provides quality services and support to schools, community, businesses, Superintendent of Schools, Board of Education, and other stakeholders.
- Works collaboratively with all stakeholders.
- Follows established procedures to ensure assigned areas are safe.
- Maintains confidentiality.
- Attends work and arrives to work on time.
- Performs other related duties as assigned.

### **Education, Experience, and Qualifications**

*Salary is based on a combination of relevant education and experience.*

- Associate's Degree with coursework emphasis in Risk Management, Insurance Administration, or a related field;
  - Two (2) years previous experience and/or training involving risk management, insurance administration, claims processing, legal office work, general office administration, or personal computer operations;
  - Or any equivalent combination of education, training, and experience that provides the required knowledge, skills, and abilities for this job.
-

- Must maintain a valid state issued driver's license.

**Knowledge, Skills, and Abilities**

- Ability to analyze investigative findings and make determinations on risk management claims
- Ability to explain procedures and policies pertaining to risk management.
- Ability to complete required paperwork/files accurately and within established deadlines.
- Maintains a comprehensive, current knowledge of applicable laws/regulations; maintains an awareness of new practices, trends regarding risk management programs/activities.
- Ability to perform addition, subtraction, multiplication, and division. Ability to calculate decimals and percentages.
- Ability to communicate verbally and in writing at a high level in order to present findings to Risk Manager.

**Physical Requirements**

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ACTIVITY	FREQUENCY				ACTIVITY	FREQUENCY			
	N	O	F	C		N	O	F	C
<b>Lift/Carry:</b>					Twist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Turn (pivot)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Climb	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21-50 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Crawl	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
51-100 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Above	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100+ lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Outward	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Push/Pull:</b>					Fine Motor Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Stand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
21-50 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sit	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
51-100 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100+ lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Squat	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
					Kneel	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drive	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Automatic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Type/Keyboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Standard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Key:</b>									
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## Job Description

Job Title:	<b>Risk Management Technician</b>		
Reports to:	<b>Manager</b>		
Job Class:	<b>V475</b>	FLSA Status:	<b>Non-Exempt</b>
<u>Pay Grade:</u>	<b>G (1012), Min \$50,154</b>	Position Certified:	<b>No</b>

*Hamilton County Schools has the right to revise this job description at any time and it does not in any way represent a contract of employment.*

### **Purpose of Job**

The purpose of this classification is to administer risk management processes for Hamilton County Schools. This position exercises judgement and discretion in handling claims, overseeing student accident reporting, coordinating on-the-job injury cases, and engaging with third-party administrators (TPAs) and employees. This role proactively identifies, analyzes, and mitigates risk while recommending strategies to help reduce exposure, improve compliance and protect district assets. In addition to processing documentation, maintaining records, and providing administrative management pertaining to claims, complaints, and legal actions the risk management technician will investigate cases, analyze for acceptance or denial purposes, make the proper determination, and provide follow up.

### **Primary Job Duties and Responsibilities**

*Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out but may be considered incidental in the performance of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the duties herein described.*

- Administers and monitors risk and claims management programs; independently evaluates student accidents, employee on-the-job injuries (OJI), liability claims, and property losses.
- Leads the administration of the district's risk and claims management system.
- Exercises judgment in determining case strategies and resolution approaches.
- Provides informed recommendations and implements risk-mitigation measures with the Risk Management Manager.
- Investigates risk management claims, analyzes cases, and exercises decision-making authority regarding initial claim acceptance, denial, or escalation.
- Organizes and prioritizes daily work activities, monitoring status of work in progress, confers with primary care providers, case management, third-party vendors, and with management regarding complex/problem situations.
- Processes a variety of documentation associated with department operations, within designated timeframes and per established procedures; distributes documentation or retains records as appropriate.
- Proactively identifies trends and implements loss prevention strategies; collaborates with schools and departments on safety initiatives.
- Serves as a primary liaison with TPAs, insurers, and medical providers to ensure timely and effective claims resolution.

- Provides guidance to employees regarding OJI processes; monitors medical treatment, return-to-work status, and case management activities.
- Coordinates processing and payment of all claims to assure cost-effective resolution and prompt closure of claims.
- Communicates through the proper channels to keep supervisor and other appropriate personnel informed of impending problems or events of unusual nature.
- Travels to school locations and other locations throughout the district to perform job duties.
- Prepares or completes various documents, reports, and correspondence, logs, claims reports, statistical reports, presentations, or other documents as required. Designs, produces, and distributes risk management analyses and reports using RMIS.
- May operate a motor vehicle to conduct various work activities.
- Complies with applicable district, state, and federal codes, laws, rules, regulations, standards, policies and procedures.
- Adheres to the Teacher Code of Ethics as defined by Tennessee Law and Code of Professional Conduct as defined by Board Policy 5.6011.
- Acts in a professional, respectful, and welcoming manner at all times.
- Creates a customer-focused climate and provides quality services and support to schools, community, businesses, Superintendent of Schools, Board of Education, and other stakeholders.
- Maintains confidentiality.
- Performs other related duties as assigned.

### **Education, Experience, and Qualifications**

*Salary is based on a combination of relevant education and experience.*

- Bachelor's Degree with coursework emphasis in Risk Management, Insurance Administration, Public Administration, Human Resources, or a related field;
- Two (2) years previous experience and/or training involving risk management, insurance administration, claims processing, legal office work, or related field;
- Or any equivalent combination of education, training, and experience that provides the required knowledge, skills, and abilities for this job.
- Must maintain a valid state issued driver's license.

### **Knowledge, Skills, and Abilities**

- Knowledge of risk management, insurance administration, and OJI/Worker's compensation law.
- Ability to exercise discretion and independent judgement in managing claims and resolving disputes.
- Skilled in developing proactive safety and loss prevention strategies.
- Skilled in negotiation and communication skills to collaborate effectively with employees, administrators, TPAs, insurers, and attorneys.
- Ability to analyze investigative findings, identify patterns, evaluate outcomes, and recommend improvements.

**Physical Requirements**

*In compliance with the Americans with Disabilities Act, the Board of Education will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.*

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	N	O	F	C		N	O	F	C
<b>Lift/Carry:</b>					Twist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Turn (pivot)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Climb	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21-50 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Crawl	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
51-100 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Above	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100+ lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Outward	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Push/Pull:</b>					Fine Motor Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Stand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
21-50 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
51-100 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100+ lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Squat	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
					Kneel	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drive	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Automatic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Type/Keyboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Standard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Key:</b>									
<b>N</b> = Never (0% of time); <b>O</b> = Occasional (1-33% of time); <b>F</b> = Frequent (34-66% of time); <b>C</b> = Constant (67-100% of time).									

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## Job Description

Job Title:	<b>Educational Diagnostician</b>		
Reports to:	<b>Supervisor</b>		
Job Class:	<b>S110, S120</b>	FLSA Status:	<b>Exempt</b>
<u>Pay Grade:</u>	<b>CE05 or CK05 (1016), Min \$50,000</b>	Position Certified:	<b>No</b>

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### **Purpose of Job**

The purpose of this classification is to provide assessment and evaluation services for preschool-age children to determine eligibility for special education services. This position works under the supervision of a licensed school psychologist. This position involves collaborating with families, educators, and specialists to develop Individualized Education Plans (IEPs) and ensures compliance with special education regulations.

### **Primary Job Duties and Responsibilities**

*Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out but may be considered incidental in the performance of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the duties herein described.*

- Administers and interprets academic achievement assessments, administers nonacademic assessments (excluding cognitive batteries), conducts classroom observations, and documents finding to inform eligibility and educational planning.
- Collaborates with the IEP team to develop and write Individualized Education Plans (IEPs), contributing assessment data, appropriate goals and recommendations for services.
- Prepares and reviews Prior Written Notices, explains evaluation processes, and addresses family concerns and questions.
- Schedules and manages IEP meetings, serving as case manager to ensure all required team members are present, documentation is prepared, and family participation is supported. Collaborates with Speech-Language Pathologists, School Psychologists, Physical Therapists, and Occupational Therapists.
- Maintains accurate, up-to-date student files in compliance with district and state requirements
- Ensures compliance with federal and state special education procedures and regulations.
- May operate a motor vehicle to conduct various work activities.
- Acts in a professional, respectful, and welcoming manner at all times.
- Creates a customer-focused climate and provides quality services and support to schools, community, businesses, Superintendent of Schools, Board of Education, and other stakeholders.
- Ensures compliance with all federal, state, and district regulations, policies, and procedures related to special education.
- Adheres to the Tennessee Teacher Code of Ethics and maintains high professional standards in all interactions.
- Maintains confidentiality of student records and sensitive information at all times.
- Performs other related duties as assigned.

**Education, Experience, and Qualifications**

*Salary is based on a combination of relevant education and experience.*

- Bachelor's degree in a related field;
- At least three (3) years teaching or work experience in a related area. Experience with formal and informal assessment techniques for students with disabilities ages 2.5 to 21 Experience or willingness to be trained. Interest in or experience with the provision of parent training and support programs.
- Or any equivalent combination of education, training, and experience that provides the required knowledge, skills, and abilities for this job.
- Must maintain a valid state issued driver's license.

**Knowledge, Skills, and Abilities**

- Knowledge of IDEA Parts B and C, Tennessee special education rules, and assessment team processes.
- Knowledge of various assessment techniques for eligibility and programming for students with disabilities in Tennessee.
- Excellent oral and written communication skills.
- Ability to work effectively in collaborative teams.

**Physical Requirements**

*In compliance with the Americans with Disabilities Act, the Board of Education will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.*

ACTIVITY	FREQUENCY				ACTIVITY	FREQUENCY			
	N	O	F	C		N	O	F	C
<b>Lift/Carry:</b>					Twist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Turn (pivot)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Climb	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21-50 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Crawl	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
51-100 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Above	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100+ lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Outward	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Push/Pull:</b>					Fine Motor Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Stand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
21-50 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sit	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
51-100 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100+ lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Squat	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					Kneel	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drive	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Automatic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Type/Keyboard	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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## Job Description

Job Title:	<b>Educational Diagnostician</b>		
Reports to:	<b>Supervisor</b>		
Job Class:	<b>S110, S120</b>	FLSA Status:	<b>Exempt</b>
<u>Pay Grade:</u>	<b>CE05 or CK05 (1016)</b>	Position Certified:	<b>No</b>

*Hamilton County Schools has the right to revise this job description at any time and it does not in any way represent a contract of employment.*

### **Purpose of Job**

The purpose of this classification is to provide assessment and evaluation services for preschool-age children to determine eligibility for special education services. This position involves collaborating with families, educators, and specialists to develop Individualized Education Plans (IEPs) and ensures compliance with special education regulations.

### **Primary Job Duties and Responsibilities**

*Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out but may be considered incidental in the performance of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the duties herein described.*

- Conducts evaluations and observations of preschool-age children, documenting findings and assessment outcomes.
- Develops and writes Individualized Education Plans (IEPs) with appropriate goals and recommendations.
- Prepares and reviews Prior Written Notices, explains evaluation processes, and addresses family questions.
- Coordinates, facilitates, and participates in virtual and in-person meetings with families and teams.
- Communicates and collaborates with Speech-Language Pathologists, School Psychologists, Physical Therapists, and Occupational Therapists.
- Manages correspondence, including emails and phone calls, with families and partner organizations.
- Maintains assessment reports, observation notes, and related documentation.
- Coordinates student services, including referrals and transportation arrangements.
- Ensures compliance with special education procedures and regulations.
- Attends meetings as needed.
- Travels to school locations and other locations throughout the district to perform job duties.
- Prepares or completes various documents, reports, and correspondence as required.
- Complies with applicable district, state, and federal codes, laws, rules, regulations, standards, policies and procedures.
- Adheres to the Teacher Code of Ethics as defined by Tennessee Law.
- Acts in a professional, respectful, and welcoming manner at all times.
- Creates a customer-focused climate and provides quality services and support to schools, community, businesses, Superintendent of Schools, Board of Education, and other stakeholders.

- Works collaboratively with all stakeholders.
- Follows established procedures to ensure assigned areas are safe.
- Maintains confidentiality.
- Attends work and arrives to work on time.
- Performs other related duties as assigned.

### **Education, Experience, and Qualifications**

*Salary is based on a combination of relevant education and experience.*

- At least three (3) years teaching or work experience in a related area. Experience with formal and informal assessment techniques for students ages 3 to 6 with disabilities including autism spectrum disorders. Experience or willingness to be trained in the provision of inclusionary school cultures. Interest in or experience with the provision of parent training and support programs.
- Bachelor's degree in a related field;
- Three (3) years of teaching or related work experience, including assessing students ages 3-6 with disabilities such as autism.
- Experience or willingness to train in inclusionary school cultures and parent training/support programs.
- Or any equivalent combination of education, training, and experience that provides the required knowledge, skills, and abilities for this job.
- Must maintain a valid state issued driver's license.

### **Knowledge, Skills, and Abilities**

- Knowledge of IDEA Parts B and C, Tennessee special education rules, and assessment team processes.
- Knowledge of various assessment techniques for eligibility and programming for children ages 3-6.
- Excellent oral and written communication skills.
- Ability to work effectively in collaborative teams.

**Physical Requirements**

*In compliance with the Americans with Disabilities Act, the Board of Education will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.*

ACTIVITY	FREQUENCY				ACTIVITY	FREQUENCY			
	N	O	F	C		N	O	F	C
<b>Lift/Carry:</b>					Twist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Turn (pivot)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Climb	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21-50 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Crawl	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
51-100 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Above	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100+ lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Outward	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Push/Pull:</b>					Fine Motor Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Stand	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Walk	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
21-50 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sit	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
51-100 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bend	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100+ lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Squat	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					Kneel	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drive	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Automatic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Type/Keyboard	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Key:</b>									
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## Job Description

Job Title:	<b>Title IX Coordinator</b>		
Reports to:	<b>Director</b>		
Job Class:	<b>P301</b>	FLSA Status:	<b>Exempt</b>
<u>Pay Grade:</u>	<b>K (2001), Min \$72,117</b>	Position Certified:	<b>No</b>

*Hamilton County Schools has the right to revise this job description at any time and it does not in any way represent a contract of employment.*

### **Purpose of Job**

The purpose of this classification is to monitor the overall implementation of Title IX for the school district and coordinating the school district's compliance with Title IX, including the school district's grievance procedures for resolving associated complaints.

### **Primary Job Duties and Responsibilities**

*Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out but may be considered incidental in the performance of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the duties herein described.*

- Develop a working knowledge of the federal Title IX (of the Education Amendments of 1972) law and its implementation regulations.
- Understand the requirements and the intent of Title IX. Keep informed of current research and legal and judicial decisions related to Title IX.
- Make determinations of Title IX applicability based upon initial information reported by district staff, parents, or students.
- Lead and coordinate the grievance procedure for Title IX complaints which includes assisting students and parents in filing and investigating the concerns or issues.
- Provide supportive measures, resources, and coordinate risk mitigation measures for those involved in Title IX grievances.
- Investigate complaints and assign to Employee Relations investigation staff as needed.
- Ensure that legal timelines related to investigations and reporting are met.
- Be informed about state laws, regulations, and policies on all equity issues, including bullying and harassment and child abuse laws.
- Be knowledgeable of federal and state laws (e.g. ADA, Section 504, IDEA) prohibiting discrimination against all protected classes (including race, religion, and sexual orientation) and assist whenever possible.
- Provide program development, including in-service training, to eliminate sex-based discrimination in the district.
- Participate in the development and implementation of the school system's sexual harassment policy.
- Monitor and evaluate the district's Title IX compliance efforts and make recommendations for any appropriate changes.
- Maintain contact with the state education agency Title IX coordinator and with the federal regional equity assistance center.
- Identify and disseminate information about Title IX educational resources.

- Maintain a visible role in the schools to ensure that staff, parents, and students in the school community know and trust that they can reach out to the Title IX coordinator for assistance.
- Monitor, coordinate and track Title IX investigations.
- Coordinate and support initiatives that promote teacher retention and professional growth across the district.
- Assist in planning and delivering talent development professional learning sessions and compliance programming.
- Collaborate to implement strategies for educator engagement.
- Support training related to mandates and compliance.
- Complies with applicable district, state, and federal codes, laws, rules, regulations, standards, policies and procedures.
- Adheres to the Teacher Code of Ethics as defined by Tennessee Law and Code of Professional Conduct as defined by Board Policy 5.6011.
- Acts in a professional, respectful, and welcoming manner at all times.
- Creates a customer-focused climate and provides quality services and support to schools, community, businesses, Superintendent of Schools, Board of Education, and other stakeholders.
- Works collaboratively with all stakeholders.
- Maintains confidentiality.
- Performs other related duties as assigned.

### **Education, Experience, and Qualifications**

*Salary is based on a combination of relevant education and experience.*

- Bachelor's degree in Business Administration, Human Resources, Public Administration, Education, or related field required.
- Five (5) years of experience in human resources, education, employee development, or related work experience required;
- Completion of Title IX coordinator training within six (6) months of start date.
- Or any equivalent combination of education, training, and experience that provides the required knowledge, skills, and abilities for this job.
- Master's degree in related field and/or Law Degree preferred.

### **Knowledge, Skills, and Abilities**

- Knowledge of federal and state laws and regulations, with the ability to interpret and apply them accurately in educational settings.
- Ability to handle sensitive subject matter with objectivity, discretion, and empathy.
- Ability to work independently, manage multiple projects, and meet deadlines effectively.
- Skilled in oral and written communication, with the ability to convey complex information clearly and professionally.
- Skilled in interpersonal communication, problem-solving, and sound reasoning in high-stakes or emotionally charged situations.

**Physical Requirements**

*In compliance with the Americans with Disabilities Act, the Board of Education will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.*

ACTIVITY	FREQUENCY				ACTIVITY	FREQUENCY			
	N	O	F	C		N	O	F	C
<b>Lift/Carry:</b>					Twist	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Turn (pivot)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11-20 lbs	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Climb	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21-50 lbs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Crawl	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
51-100 lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Above	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
100+ lbs	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reach Outward	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Push/Pull:</b>					Fine Motor Tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 lbs or less	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Stand	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
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					Kneel	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drive	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Automatic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Type/Keyboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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**To:** Hamilton County Board of Education  
Dr. Justin Robertson, Superintendent

**From:** Dr. Zac Brown  
Chief Talent Officer

**Date:** October 9, 2025

**Subject:** PECCA Special Questions Committee

**Board Agenda Category:**

- Consent Agenda
  - Action Item
  - Reports and Information
- 

The board must approve an equal number of professional employees and members of the local board to serve as a "special question committee" (SQC) for purposes of conducting a confidential poll of eligible employees. This poll will determine whether professional employees wish to undertake collaborative conferences with the local board and, if so, which organization each person prefers as a representative.

Tenn. Code Ann. § 49-5-605 directs that the board of education shall appoint an equal number of its professional employees and board members to serve on a special question committee for the purpose of conducting a confidential poll of all eligible professional employees. We respectfully request that the board of education delegate these duties to an equal number of professional employees and HCDE staff based on experience with the polling process.

The recommended committee members include:

- Gary Kuehn, School Board Member
- John Simon, HCDE
- Penny Murray, HCDE
- Dr. Marques Stewart, HCDE
- Lori Cleveland, HCEA
- Kayla Butler HCEA
- Michelle Gooden, HCEA
- Jeanette O'Markhail, HCEA

We respectfully request your approval.

## **Opportunity 2030 Commitment Connection**

- Every Student Learns
- Every Student Belongs
- Every School Equipped
- Every Employee Valued
- Every Community Served



October 1, 2025

Dear Joe Smith (Hamilton County School Board Chair), Dr. Justin Robertson (Hamilton County Schools Superintendent):

Pursuant to Section 49-5-605, the individual employees of the Hamilton County Education Association desire to continue participation in collaborative conferencing with the Hamilton County Board of Education. We understand that no professional employee, group of professional employees or professional employees' organization is to be denied the opportunity to represent themselves or groups of professional employees in discussions authorized pursuant to the Professional Educators Collaborative Conferencing Act of 2011. The individual employees of the Hamilton County Education Association are taking the steps necessary to initiate collaborative conferencing.

We understand the following:

1. That as professional employees, we have the right to participate in collaborative conferencing through representatives of our own choosing. (Section 49-5-603)
2. That we must submit such a request by at least fifteen percent (15%) or more of the professional employees in the Hamilton County School System. (Section 49-5-605(b)(1))
3. That the submission must occur "between October 1 and November 1 of any year." (Section 49-5-605(b)(1))
4. That this submission will require the board of education to appoint a special question committee for the purpose of conducting a confidential poll of all eligible professional employees (as defined in Section 49-5-602(8)). (Section 49-5-605(b)(1))

Enclosed are the petitions signed by **1304** of the total eligible professional employees employed in this school system. This is well above the required 15% needed. The petitions reflect the printed and legal signature of the employees. We have verified they are eligible to vote on this matter.

We are looking forward to continuing the important relationships that enable us to promote a professional climate based upon mutual interest in order to focus efforts on teaching and learning for all students of the public schools.

Sincerely,

A handwritten signature in black ink that reads 'Jeanette M. Omarkhail'.

Jeanette Omarkhail  
President, Hamilton County Education Association

A handwritten signature in black ink that reads 'Lori Cleveland'.

Lori Cleveland  
HCEA PECCA Team Chair

To: Hamilton County Board of Education  
Dr. Justin Robertson, Superintendent

From: Justin Witt

Date: October 9, 2025

Subject: Brainerd/Dalewood Architect Contract

Board Agenda Category:

- Consent Agenda
- Action Item
- Reports and Information

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Please see the attached contract with HK Architects for the design of the Brainerd High School/Dalewood Middle Addition and Renovation. The contract requires School Board approval.

Opportunity 2030 Commitment Connection

- Every Student Learns
- Every Student Belongs
- Every School Equipped
- Every Employee Valued
- Every Community Served

 **AIA<sup>®</sup> Document B133<sup>®</sup> – 2019****Standard Form of Agreement Between Owner and Architect, Construction Manager as Constructor Edition**

**AGREEMENT** made as of the Second day of October in the year twenty twenty five  
(In words, indicate day, month and year.)

**BETWEEN** the Architect's client identified as the Owner:  
(Name, legal status, address, and other information)

Hamilton County Government  
625 Georgia Avenue  
Chattanooga, TN 37402

Hamilton County Department of Education  
3074 Hickory Valley Rd  
Chattanooga, TN 37421  
(423) 498-7020

and the Architect:  
(Name, legal status, address, and other information)

Hefferlin + Kronenberg Architects, PLLC.  
1216 E Main Street, Suite 120  
Chattanooga, TN 37408  
(423)266-3656

for the following Project:  
(Name, location, and detailed description)

Brainerd High School Renovations and Additions  
1020 N Moore Rd, Chattanooga, TN 37411  
The Project consists of professional architectural and related design services for renovations and additions to the Brainerd High School campus, located at 1020 N. Moore Road, Chattanooga, Tennessee 37411, situated on a parcel of approximately 35.65 acres and zoned R-1. The intent of the Project is to create a combined grades 6–12 campus for Brainerd High School and Dalewood Middle School, as further defined in "Exhibit A – Brainerd / Dalewood Facility Report".

The Construction Manager (if known):  
(Name, legal status, address, and other information)

T.B.D.

**ADDITIONS AND DELETIONS:**  
The author of this document may have revised the text of the original AIA standard form. An *Additions and Deletions Report* that notes revisions to the standard form text is available from the author and should be reviewed. A vertical line in the left margin of this document indicates where the author has added to or deleted from the original AIA text.

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

This document is intended to be used in conjunction with AIA Documents A201–2017™, General Conditions of the Contract for Construction; A133–2019™ Standard Form of Agreement Between Owner and Construction Manager as Constructor where the basis of payment is the Cost of the Work Plus a Fee with a Guaranteed Maximum Price; and A134–2019™ Standard Form of Agreement Between Owner and Construction Manager as Constructor where the basis of payment is the Cost of the Work Plus a Fee without a Guaranteed Maximum Price.

AIA Document A201™–2017 is adopted in this document by reference. Do not use with other general conditions unless this document is modified.

The Owner and Architect agree as follows.

## TABLE OF ARTICLES

- 1 INITIAL INFORMATION
- 2 ARCHITECT'S RESPONSIBILITIES
- 3 SCOPE OF ARCHITECT'S BASIC SERVICES
- 4 SUPPLEMENTAL AND ADDITIONAL SERVICES
- 5 OWNER'S RESPONSIBILITIES
- 6 COST OF THE WORK
- 7 COPYRIGHTS AND LICENSES
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- 11 COMPENSATION
- 12 SPECIAL TERMS AND CONDITIONS
- 13 SCOPE OF THE AGREEMENT

### ARTICLE 1 INITIAL INFORMATION

§ 1.1 This Agreement is based on the Initial Information set forth in this Section 1.1.

*(For each item in this section, insert the information or a statement such as "not applicable" or "unknown at time of execution.")*

§ 1.1.1 The Owner's program for the Project:

*(Insert the Owner's program, identify documentation that establishes the Owner's program, or state the manner in which the program will be developed.)*

Prior to initiation of Schematic Design, the Architect will provide programming services as described in § 4.1.2.1.

The initial project scope as defined in "Exhibit A – Brainerd / Dalewood Facility Report" includes:

- .1 Renovations and additions to the existing facility to update and improve the school while incorporating Dalewood Middle School on the campus.
  - a. **Middle School**
    - Core Academic
    - Related Arts
    - Career and Technical Education
    - General Use
    - Office Area
    - Gymnasium
    - Circulation
  - b. **High School**
    - Core Academic
    - General Use
    - Gymnasium
    - Circulation

c. **Shared Spaces**

- Cafeteria
- Auditorium
- Band/Choral
- Electives
- Exceptional Ed Administration
- Media
- General Use
- Circulation

- .2 A Field House
- .3 A Softball Field.
- .4 A Storm Shelter, if required by the Client or Authorities Having Jurisdiction
- .5 A Fire Sprinkler System, if required by the Client or Authorities Having Jurisdiction
- .6 A Reroof is not included in the Project Scope

**§ 1.1.2** The Project's physical characteristics:

*(Identify or describe pertinent information about the Project's physical characteristics, such as size; location; dimensions; geotechnical reports; site boundaries; topographic surveys; traffic and utility studies; availability of public and private utilities and services; legal description of the site, etc.)*

The existing facility contains approximately 157,925 gross square feet, including the original building constructed in 1959 and subsequent additions, namely the auto mechanics building completed in 1979, the vocational classroom wing with cosmetology laboratory completed in 1991, and the northwest addition completed in 1993. In addition to the high school building, the campus includes a track, football field, baseball field, concession stand, driver training course, and parking areas.

The current facility is a steel-framed building with masonry bearing walls and exterior masonry veneer. It is not equipped with an automatic fire sprinkler system, and, according to "Exhibit A – Brainerd / Dalewood Facility Report", many of the building systems have exceeded their standard lifespans and require substantial renovation or replacement.

The property is adjacent to the Brainerd Levee. While the current school and associated facilities are not located in the floodway or 100-year floodplain, a portion of the site lies within the 500-year floodplain. This condition will be considered throughout the design process.

Access to the site is from Moore Road with two curb cuts.

**§ 1.1.3** The Owner's budget for the Cost of the Work, as defined in Section 6.1:

*(Provide total and, if known, a line item breakdown.)*

Thirty-Three Million, Two Hundred Thousand Dollars (\$33,200,000)

See "Exhibit B - Project Budget and Fee Schedule" for the Project Budget breakdown

**§ 1.1.4** The Owner's anticipated design and construction milestone dates:

.1 Design phase milestone dates, if any:  
TBD

.2 Construction commencement date:  
TBD

.3 Substantial Completion date or dates:  
TBD

**.4 Other milestone dates:**

TBD

**§ 1.1.5** The Owner intends to retain a Construction Manager pursuant to the following agreement:  
*(Indicate agreement type.)*

- AIA Document A133–2019, Standard Form of Agreement Between Owner and Construction Manager as Constructor where the basis of payment is the Cost of the Work Plus a Fee with a Guaranteed Maximum Price.
- AIA Document A134–2019, Standard Form of Agreement Between Owner and Construction Manager as Constructor where the basis of payment is the Cost of the Work Plus a Fee without a Guaranteed Maximum Price.

**§ 1.1.6** The Owner’s requirements for accelerated or fast-track design and construction, or phased construction are set forth below:  
*(List number and type of bid/procurement packages.)*

It is anticipated that construction will occur in phases in order to maintain school operations during the Work. The specific phasing plan shall be determined following approval of the design. As part of Basic Services, the Architect shall prepare documents for up to three (3) separate bid packages to accommodate the approved phasing plan. Additional bid packages, if required, shall be considered Additional Services as described at **§ 4.2.1**.

**§ 1.1.7** The Owner’s anticipated Sustainable Objective for the Project:  
*(Identify and describe the Owner’s Sustainable Objective for the Project, if any.)*

N/A

**§ 1.1.7.1** If the Owner identifies a Sustainable Objective, the Owner and Architect shall complete and incorporate AIA Document E234™–2019, Sustainable Projects Exhibit, Construction Manager as Constructor Edition, into this Agreement to define the terms, conditions and services related to the Owner’s Sustainable Objective. If E234–2019 is incorporated into this Agreement, the Owner and Architect shall incorporate the completed E234–2019 into the agreements with the consultants and contractors performing services or Work in any way associated with the Sustainable Objective.

**§ 1.1.8** The Owner identifies the following representative in accordance with Section 5.4:  
*(List name, address, and other contact information.)*

Justin Witt, Director  
Maintenance & Operations, Hamilton County  
2501 Dodds Avenue  
Chattanooga, TN 37407  
(423) 498-7255  
Witt\_justin@hcde.org

**§ 1.1.9** The persons or entities, in addition to the Owner’s representative, who are required to review the Architect’s submittals to the Owner are as follows:  
*(List name, address, and other contact information.)*

**§ 1.1.10** The Owner shall retain the following consultants and contractors:  
*(List name, legal status, address, and other contact information.)*

- .1 Construction Manager:**  
*(The Construction Manager is identified on the cover page. If a Construction Manager has not been retained as of the date of this Agreement, state the anticipated date of retention. If the*

*Architect is to assist the Owner in selecting the Construction Manager, complete Section 4.1.1.1)*

Not selected at date of contract. The Owner shall retain a Construction Manager prior to the initiation of the Design Development Phase.

**.2 Land Surveyor:**

Not selected at date of contract.

**.3 Geotechnical Engineer:**

Not selected at date of contract.

**.4 Other consultants and contractors:**

*(List any other consultants and contractors retained by the Owner.)*

- .1 Hazardous material testing and abatement design
- .2 Hazardous material abatement
- .3 Data, Security, Camera, Fire Alarm

**§ 1.1.11** The Architect identifies the following representative in accordance with Section 2.4:  
*(List name, address, and other contact information.)*

Michael Prater, Project Manager  
Hefferlin + Kronenberg Architects, PLLC.  
1216 E Main Street, Suite 120  
Chattanooga, TN 37408  
(423) 266-3656  
mprater@hkarchitects.net

**§ 1.1.12** The Architect shall retain the consultants identified in Sections 1.1.12.1 and 1.1.12.2:  
*(List name, legal status, address, and other contact information.)*

**§ 1.1.12.1** Consultants retained under Basic Services:

**.1 Structural Engineer:**

Tommy Ireland, PE  
Bennett & Pless, Inc.  
1428 Chestnut Street, Suite 120  
Chattanooga, TN 37402  
(423) 756-7943

**.2 Mechanical Engineer:**

Matthew Williams, PE, LEED AP  
Campbell & Associates, Inc.  
1401 Carter Street, Suite 100  
Chattanooga, TN 37402  
(423) 267-9718

**.3 Electrical Engineer:**

John Germ, PE  
Campbell & Associates, Inc.  
1401 Carter Street, Suite 100  
Chattanooga, TN 37402  
(423) 267-9718

**.4 Civil Engineer:**

Donna Shepherd  
Kimley Horn  
537 Market Street, Suite 202  
Chattanooga, TN 37402  
(423) 266-3501

**.5 Landscape Architect:**

Alisha Eley, PLA  
Kimley Horn  
537 Market Street, Suite 202  
Chattanooga, TN 37402  
(423) 266-3501

**§ 1.1.12.2 Consultants retained under Supplemental Services:**

Kitchen Consultant  
Dennis Ford  
DFFSC, LLC  
2516 Cedar Lane, Bldg. B  
Knoxville, TN 37918  
(865) 216-8418

**§ 1.1.13 Other Initial Information on which the Agreement is based:**

“Exhibit A – Brainerd / Dalewood Facility Report” dated July 22, 2024

**§ 1.2** The Owner and Architect may rely on the Initial Information. Both parties, however, recognize that the Initial Information may materially change and, in that event, the Owner and the Architect shall appropriately adjust the Architect’s services, schedule for the Architect’s services, and the Architect’s compensation. The Owner shall adjust the Owner’s budget for the Cost of the Work and the Owner’s anticipated design and construction milestones, as necessary, to accommodate material changes in the Initial Information.

**§ 1.3** The parties shall agree upon written protocols governing the transmission and use of, and reliance on, Instruments of Service or any other information or documentation in digital form.

**§ 1.3.1** Any use of, or reliance on, all or a portion of a building information model without agreement to written protocols governing the use of, and reliance on, the information contained in the model shall be at the using or relying party’s sole risk and without liability to the other party and its contractors or consultants, the authors of, or contributors to, the building information model, and each of their agents and employees.

**ARTICLE 2 ARCHITECT’S RESPONSIBILITIES**

**§ 2.1** The Architect shall provide professional services as set forth in this Agreement. The Architect represents that it is properly licensed in the jurisdiction where the Project is located to provide the services required by this Agreement, or shall cause such services to be performed by appropriately licensed design professionals.

**§ 2.2** The Architect shall perform its services consistent with the professional skill and care ordinarily provided by architects practicing in the same or similar locality under the same or similar circumstances. The Architect shall perform its services as expeditiously as is consistent with such professional skill and care and the orderly progress of the Project.

**§ 2.3** The Architect shall provide its services in conjunction with the services of a Construction Manager as described in the agreement identified in Section 1.1.5. The Architect shall not be responsible for actions taken by the Construction Manager.

§ 2.4 The Architect shall identify a representative authorized to act on behalf of the Architect with respect to the Project.

§ 2.5 Except with the Owner's knowledge and consent, the Architect shall not engage in any activity, or accept any employment, interest or contribution that would reasonably appear to compromise the Architect's professional judgment with respect to this Project.

§ 2.6 **Insurance.** The Architect shall maintain the following insurance until termination of this Agreement. If any of the requirements set forth below are in addition to the types and limits the Architect normally maintains, the Owner shall pay the Architect as set forth in Section 11.9.

§ 2.6.1 Commercial General Liability with policy limits of not less than One Million Dollars (\$ 1,000,000 ) for each occurrence and Two Million Dollars (\$ 2,000,000 ) in the aggregate for bodily injury and property damage.

§ 2.6.2 Automobile Liability covering vehicles owned, and non-owned vehicles used, by the Architect with policy limits of not less than One Million Dollars (\$ 1,000,000 ) per accident for bodily injury, death of any person, and property damage arising out of the ownership, maintenance and use of those motor vehicles, along with any other statutorily required automobile coverage.

§ 2.6.3 The Architect may achieve the required limits and coverage for Commercial General Liability and Automobile Liability through a combination of primary and excess or umbrella liability insurance, provided such primary and excess or umbrella liability insurance policies result in the same or greater coverage as the coverages required under Sections 2.6.1 and 2.6.2, and in no event shall any excess or umbrella liability insurance provide narrower coverage than the primary policy. The excess policy shall not require the exhaustion of the underlying limits only through the actual payment by the underlying insurers.

§ 2.6.4 Workers' Compensation at statutory limits.

§ 2.6.6 Professional Liability covering negligent acts, errors and omissions in the performance of professional services, with policy limits of not less than One Million Dollars (\$ 1,000,000 ) per claim and Two Million Dollars (\$ 2,000,000 ) in the aggregate.

§ 2.6.7 **Additional Insured Obligations.** To the fullest extent permitted by law, the Architect shall cause the primary and excess or umbrella policies for Commercial General Liability and Automobile Liability to include the Owner as an additional insured for claims caused in whole or in part by the Architect's negligent acts or omissions. The additional insured coverage shall be primary and non-contributory to any of the Owner's insurance policies and shall apply to both ongoing and completed operations.

§ 2.6.8 The Architect shall provide certificates of insurance to the Owner that evidence compliance with the requirements in this Section 2.6.

### ARTICLE 3 SCOPE OF ARCHITECT'S BASIC SERVICES

§ 3.1 The Architect's Basic Services consist of those described in this Article 3 and include usual and customary structural, mechanical, electrical, and civil engineering services. Services not set forth in this Article 3 are Supplemental or Additional Services.

§ 3.1.1 The Architect shall manage the Architect's services, research applicable design criteria, attend Project meetings, communicate with members of the Project team, and report progress to the Owner.

§ 3.1.2 The Architect shall coordinate its services with those services provided by the Owner, the Construction Manager, and the Owner's consultants. The Architect shall be entitled to rely on, and shall not be responsible for, the accuracy, completeness, and timeliness of, services and information furnished by the Owner, the Construction Manager, and the Owner's consultants. The Architect shall provide prompt written notice to the Owner if the Architect becomes aware of any error, omission, or inconsistency in such services or information.

§ 3.1.3 As soon as practicable after the date of this Agreement, the Architect shall submit, for the Owner's approval, a schedule for the performance of the Architect's services. The schedule shall include design phase milestone dates, as well as the anticipated dates for the commencement of construction and for Substantial Completion of the Work as set forth in the Initial Information. The schedule shall include allowances for periods

of time required for the Owner's review, for the Construction Manager's review, for the performance of the Construction Manager's Preconstruction Phase services, for the performance of the Owner's consultants, and for approval of submissions by authorities having jurisdiction over the Project. Once approved by the Owner, time limits established by the schedule shall not, except for reasonable cause, be exceeded by the Architect or Owner. With the Owner's approval, the Architect shall adjust the schedule, if necessary, as the Project proceeds until the commencement of construction.

§ 3.1.4 The Architect shall submit information to the Owner and participate in developing and revising the Project schedule as it relates to the Architect's services. The Architect shall review and approve, or take other appropriate action upon, the portion of the Project schedule relating to the performance of the Architect's services.

§ 3.1.5 The Architect shall not be responsible for an Owner's directive or substitution, or for the Owner's acceptance of non-conforming work, made or given without the Architect's written approval.

§ 3.1.6 The Architect shall, in coordination with the Construction Manager, contact governmental authorities required to approve the Construction Documents and entities providing utility services to the Project. The Architect shall respond to applicable design requirements imposed by those authorities and entities.

§ 3.1.7 The Architect shall assist the Owner and Construction Manager in connection with the Owner's responsibility for filing documents required for the approval of governmental authorities having jurisdiction over the Project.

§ 3.1.8 Prior to the Owner's acceptance of the Construction Manager's Guaranteed Maximum Price proposal, or the Owner's approval of the Construction Manager's Control Estimate, as applicable, the Architect shall consider the Construction Manager's requests for substitutions and, upon written request of the Construction Manager, provide clarification or interpretations pertaining to the Drawings, Specifications, and other documents submitted by the Architect. The Architect and Construction Manager shall include the Owner in communications related to substitution requests, clarifications, and interpretations.

### § 3.2 Review of the Construction Manager's Guaranteed Maximum Price Proposal or Control Estimate

§ 3.2.1 At a time to be mutually agreed upon by the Owner and the Construction Manager, the Construction Manager shall prepare, for review by the Owner and Architect, and for the Owner's acceptance or approval, a Guaranteed Maximum Price proposal or Control Estimate. The Architect shall assist the Owner in reviewing the Construction Manager's proposal or estimate. The Architect's review is not for the purpose of discovering errors, omissions, or inconsistencies; for the assumption of any responsibility for the Construction Manager's proposed means, methods, sequences, techniques, or procedures; or for the verification of any estimates of cost or estimated cost proposals. In the event that the Architect discovers any inconsistencies or inaccuracies in the information presented, the Architect shall promptly notify the Owner and Construction Manager.

§ 3.2.2 Upon authorization by the Owner, and subject to Section 4.2.1.14, the Architect shall update the Drawings, Specifications, and other documents to incorporate the agreed upon assumptions and clarifications contained in the Guaranteed Maximum Price Amendment or Control Estimate.

### § 3.3 Schematic Design Phase Services

§ 3.3.1 The Architect shall review the program, and other information furnished by the Owner, and shall review laws, codes, and regulations applicable to the Architect's services.

§ 3.3.2 The Architect shall prepare a preliminary evaluation of the Owner's program, schedule, budget for the Cost of the Work, Project site, and other Initial Information, each in terms of the other, to ascertain the requirements of the Project. The Architect shall notify the Owner of (1) any inconsistencies discovered in the information, and (2) other information or consulting services that may be reasonably needed for the Project.

§ 3.3.3 The Architect shall present its preliminary evaluation to the Owner and shall discuss with the Owner alternative approaches to design and construction of the Project. The Architect shall reach an understanding with the Owner regarding the requirements of the Project.

§ 3.3.4 Based on the Project requirements agreed upon with the Owner, the Architect shall prepare and present, to the Owner, for the Owner's approval, a preliminary design illustrating the scale and relationship of the Project components.

§ 3.3.5 Based on the Owner's approval of the preliminary design, the Architect shall prepare Schematic Design Documents for Construction Manager's review and the Owner's approval. The Schematic Design Documents shall consist of drawings and other documents including a site plan, if appropriate, and preliminary building plans, sections and elevations; and may include some combination of study models, perspective sketches, or digital representations. Preliminary selections of major building systems and construction materials shall be noted on the drawings or described in writing.

§ 3.3.5.1 The Architect shall consider sustainable design alternatives, such as material choices and building orientation, together with other considerations based on program and aesthetics, in developing a design that is consistent with the Owner's program, schedule and budget for the Cost of the Work. The Owner may obtain more advanced sustainable design services as a Supplemental Service under Section 4.1.

§ 3.3.5.2 The Architect shall consider with the Owner the value of alternative materials, building systems and equipment, together with other considerations based on program and aesthetics, in developing a design for the Project that is consistent with the Owner's program, schedule, and budget for the Cost of the Work.

§ 3.3.6 The Architect shall submit the Schematic Design Documents to the Owner. The Architect shall meet with the Owner to review the Schematic Design Documents.

§ 3.3.7 Upon receipt of the Construction Manager's review comments and cost estimate at the conclusion of the Schematic Design Phase, the Architect shall request the Owner's approval of the Schematic Design Documents. If revisions to the Schematic Design Documents are required at the conclusion of the Schematic Design Phase, the Architect shall incorporate the required revisions in the Design Development Phase.

§ 3.3.8 In the further development of the Drawings and Specifications during this and subsequent phases of design, the Architect shall be entitled to rely on the accuracy of the estimates of the Cost of the Work, which are to be provided by the Construction Manager under the Construction Manager's agreement with the Owner.

#### § 3.4 Design Development Phase Services

§ 3.4.1 Based on the Owner's approval of the Schematic Design Documents, and on the Owner's authorization of any adjustments in the Project requirements and the budget for the Cost of the Work, the Architect shall prepare Design Development Documents for the Construction Manager's review and the Owner's approval. The Design Development Documents shall be based upon information provided, and estimates prepared by, the Construction Manager and shall illustrate and describe the development of the approved Schematic Design Documents and shall consist of drawings and other documents including plans, sections, elevations, typical construction details, and diagrammatic layouts of building systems to fix and describe the size and character of the Project as to architectural, structural, mechanical and electrical systems, and other appropriate elements. The Design Development Documents shall also include outline specifications that identify major materials and systems and establish in general their quality levels.

§ 3.4.2 Prior to the conclusion of the Design Development Phase, the Architect shall submit the Design Development Documents to the Owner and the Construction Manager. The Architect shall meet with the Construction Manager to review the Design Development Documents.

§ 3.4.3 Upon receipt of the Construction Manager's information and estimate at the conclusion of the Design Development Phase, the Architect shall take action as required under Sections 6.5 and 6.6 and request the Owner's approval of the Design Development Documents.

#### § 3.5 Construction Documents Phase Services

§ 3.5.1 Based on the Owner's approval of the Design Development Documents, and on the Owner's authorization of any adjustments in the Project requirements and the budget for the Cost of the Work, the Architect shall prepare Construction Documents for the Construction Manager's review and the Owner's approval. The Construction Documents shall illustrate and describe the further development of the approved Design Development Documents and shall consist of Drawings and Specifications setting forth in detail the quality levels and performance criteria of materials and systems and other requirements for the construction of the Work. The Owner and Architect acknowledge that, in order to perform the Work, the Construction Manager will provide additional information, including Shop Drawings, Product Data, Samples and other similar submittals, which the Architect shall review in accordance with Section 3.6.4.

§ 3.5.2 The Architect shall incorporate the design requirements of governmental authorities having jurisdiction over the Project into the Construction Documents.

§ 3.5.3 During the development of the Construction Documents, if requested by the Owner, the Architect shall assist the Owner and Construction Manager in the development and preparation of (1) the Conditions of the Contract for Construction (General, Supplementary and other Conditions) and (2) a project manual that includes the Conditions of the Contract for Construction and Specifications, and may include sample forms.

§ 3.5.4 Prior to the conclusion of the Construction Documents Phase, the Architect shall submit the Construction Documents to the Owner and the Construction Manager. The Architect shall meet with the Construction Manager to review the Construction Documents.

§ 3.5.5 Upon receipt of the Construction Manager's information and estimate at the conclusion of the Construction Documents Phase, the Architect shall take action as required under Section 6.7, and request the Owner's approval of the Construction Documents.

### § 3.6 Construction Phase Services

#### § 3.6.1 General

§ 3.6.1.1 The Architect shall provide administration of the Contract between the Owner and the Construction Manager as set forth below and in AIA Document A201™–2017, General Conditions of the Contract for Construction. If the Owner and Construction Manager modify AIA Document A201–2017, those modifications shall not affect the Architect's services under this Agreement unless the Owner and the Architect amend this Agreement. The term "Contractor" as used in A201-2017 shall mean the Construction Manager.

§ 3.6.1.2 Subject to Section 4.2, the Architect's responsibility to provide Construction Phase Services commences upon the Owner's acceptance of the Construction Manager's Guaranteed Maximum Price proposal, the Owner's approval of the Construction Manager's Control Estimate, or by a written agreement between the Owner and Construction Manager which sets forth a description of the Work to be performed by the Construction Manager prior to such acceptance or approval. Subject to Section 4.2, and except as provided in Section 3.6.6.5, the Architect's responsibility to provide Construction Phase Services terminates on the date the Architect issues the final Certificate for Payment.

§ 3.6.1.3 The Architect shall advise and consult with the Owner and Construction Manager during the Construction Phase Services. The Architect shall have authority to act on behalf of the Owner only to the extent provided in this Agreement. The Architect shall not have control over, charge of, or responsibility for the construction means, methods, techniques, sequences or procedures, or for safety precautions and programs in connection with the Work, nor shall the Architect be responsible for the Construction Manager's failure to perform the Work in accordance with the requirements of the Contract Documents. The Architect shall be responsible for the Architect's negligent acts or omissions, but shall not have control over or charge of, and shall not be responsible for, acts or omissions of the Construction Manager or of any other persons or entities performing portions of the Work.

#### § 3.6.2 Evaluations of the Work

§ 3.6.2.1 The Architect shall visit the site at intervals appropriate to the stage of construction, or as otherwise required in Section 4.2.3, to become generally familiar with the progress and quality of the portion of the Work completed, and to determine, in general, if the Work observed is being performed in a manner indicating that the Work, when fully completed, will be in accordance with the Contract Documents. However, the Architect shall not be required to make exhaustive or continuous on-site inspections to check the quality or quantity of the Work. On the basis of the site visits, the Architect shall keep the Owner reasonably informed about the progress and quality of the portion of the Work completed, and promptly report to the Owner (1) known deviations from the Contract Documents, (2) known deviations from the most recent construction schedule submitted by the Construction Manager, and (3) defects and deficiencies observed in the Work.

§ 3.6.2.2 The Architect has the authority to reject Work that does not conform to the Contract Documents. Whenever the Architect considers it necessary or advisable, the Architect shall have the authority to require inspection or testing of the Work in accordance with the provisions of the Contract Documents, whether or not the Work is fabricated, installed or completed. However, neither this authority of the Architect nor a decision made in good faith either to exercise or not to exercise such authority shall give rise to a duty or responsibility of the

Architect to the Construction Manager, Subcontractors, suppliers, their agents or employees, or other persons or entities performing portions of the Work.

**§ 3.6.2.3** The Architect shall interpret and decide matters concerning performance under, and requirements of, the Contract Documents on written request of either the Owner or Construction Manager. The Architect's response to such requests shall be made in writing within any time limits agreed upon or otherwise with reasonable promptness.

**§ 3.6.2.4** Interpretations and decisions of the Architect shall be consistent with the intent of, and reasonably inferable from, the Contract Documents and shall be in writing or in the form of drawings. When making such interpretations and decisions, the Architect shall endeavor to secure faithful performance by both Owner and Construction Manager, shall not show partiality to either, and shall not be liable for results of interpretations or decisions rendered in good faith. The Architect's decisions on matters relating to aesthetic effect shall be final if consistent with the intent expressed in the Contract Documents.

**§ 3.6.2.5** Unless the Owner and Construction Manager designate another person to serve as an Initial Decision Maker, as that term is defined in AIA Document A201–2017, the Architect shall render initial decisions on Claims between the Owner and Construction Manager as provided in the Contract Documents.

### **§ 3.6.3 Certificates for Payment to Construction Manager**

**§ 3.6.3.1** The Architect shall review and certify the amounts due the Construction Manager and shall issue certificates in such amounts. The Architect's certification for payment shall constitute a representation to the Owner, based on the Architect's evaluation of the Work as provided in Section 3.6.2 and on the data comprising the Construction Manager's Application for Payment, that, to the best of the Architect's knowledge, information and belief, the Work has progressed to the point indicated, the quality of the Work is in accordance with the Contract Documents, and that the Construction Manager is entitled to payment in the amount certified. The foregoing representations are subject to (1) an evaluation of the Work for conformance with the Contract Documents upon Substantial Completion, (2) results of subsequent tests and inspections, (3) correction of minor deviations from the Contract Documents prior to completion, and (4) specific qualifications expressed by the Architect.

**§ 3.6.3.2** The issuance of a Certificate for Payment shall not be a representation that the Architect has (1) made exhaustive or continuous on-site inspections to check the quality or quantity of the Work, (2) reviewed construction means, methods, techniques, sequences or procedures, (3) reviewed copies of requisitions received from Subcontractors and suppliers and other data requested by the Owner to substantiate the Construction Manager's right to payment, or (4) ascertained how or for what purpose the Construction Manager has used money previously paid on account of the Contract Sum.

**§ 3.6.3.3** The Architect shall maintain a record of the Applications and Certificates for Payment.

### **§ 3.6.4 Submittals**

**§ 3.6.4.1** The Architect shall review the Construction Manager's submittal schedule and shall not unreasonably delay or withhold approval of the schedule. The Architect's action in reviewing submittals shall be taken in accordance with the approved submittal schedule or, in the absence of an approved submittal schedule, with reasonable promptness while allowing sufficient time, in the Architect's professional judgment, to permit adequate review.

**§ 3.6.4.2** The Architect shall review and approve, or take other appropriate action upon, the Construction Manager's submittals such as Shop Drawings, Product Data and Samples, but only for the limited purpose of checking for conformance with information given and the design concept expressed in the Contract Documents. Review of such submittals is not for the purpose of determining the accuracy and completeness of other information such as dimensions, quantities, and installation or performance of equipment or systems, which are the Construction Manager's responsibility. The Architect's review shall not constitute approval of safety precautions or construction means, methods, techniques, sequences or procedures. The Architect's approval of a specific item shall not indicate approval of an assembly of which the item is a component.

**§ 3.6.4.3** If the Contract Documents specifically require the Construction Manager to provide professional design services or certifications by a design professional related to systems, materials, or equipment, the Architect shall specify the appropriate performance and design criteria that such services must satisfy. The Architect shall review

and take appropriate action on Shop Drawings and other submittals related to the Work designed or certified by the Construction Manager's design professional, provided the submittals bear such professional's seal and signature when submitted to the Architect. The Architect's review shall be for the limited purpose of checking for conformance with information given and the design concept expressed in the Contract Documents. The Architect shall be entitled to rely upon, and shall not be responsible for, the adequacy and accuracy of the services, certifications, and approvals performed or provided by such design professionals.

**§ 3.6.4.4** Subject to Section 4.2, the Architect shall review and respond to requests for information about the Contract Documents. The Architect shall set forth, in the Contract Documents, the requirements for requests for information. Requests for information shall include, at a minimum, a detailed written statement that indicates the specific Drawings or Specifications in need of clarification and the nature of the clarification requested. The Architect's response to such requests shall be made in writing within any time limits agreed upon, or otherwise with reasonable promptness. If appropriate, the Architect shall prepare and issue supplemental Drawings and Specifications in response to the requests for information.

**§ 3.6.4.5** The Architect shall maintain a record of submittals and copies of submittals supplied by the Construction Manager in accordance with the requirements of the Contract Documents.

### **§ 3.6.5 Changes in the Work**

**§ 3.6.5.1** The Architect may order minor changes in the Work that are consistent with the intent of the Contract Documents and do not involve an adjustment in the Contract Sum or an extension of the Contract Time. Subject to Section 4.2, the Architect shall prepare Change Orders and Construction Change Directives for the Owner's approval and execution in accordance with the Contract Documents.

**§ 3.6.5.2** The Architect shall maintain records relative to changes in the Work.

### **§ 3.6.6 Project Completion**

**§ 3.6.6.1** The Architect shall:

- .1 conduct inspections to determine the date or dates of Substantial Completion and the date of final completion;
- .2 issue Certificates of Substantial Completion;
- .3 forward to the Owner, for the Owner's review and records, written warranties and related documents required by the Contract Documents and received from the Construction Manager; and
- .4 issue a final Certificate for Payment based upon a final inspection indicating that, to the best of the Architect's knowledge, information, and belief, the Work complies with the requirements of the Contract Documents.

**§ 3.6.6.2** The Architect's inspections shall be conducted with the Owner to (1) check conformance of the Work with the requirements of the Contract Documents and (2) verify the accuracy and completeness of the list submitted by the Construction Manager of Work to be completed or corrected.

**§ 3.6.6.3** When Substantial Completion has been achieved, the Architect shall inform the Owner about the balance of the Contract Sum remaining to be paid the Construction Manager, including the amount to be retained from the Contract Sum, if any, for final completion or correction of the Work.

**§ 3.6.6.4** The Architect shall forward to the Owner the following information received from the Construction Manager: (1) consent of surety or sureties, if any, to reduction in or partial release of retainage or the making of final payment; (2) affidavits, receipts, releases and waivers of liens, or bonds indemnifying the Owner against liens; and (3) any other documentation required of the Construction Manager under the Contract Documents.

**§ 3.6.6.5** Upon request of the Owner, and prior to the expiration of one year from the date of Substantial Completion, the Architect shall, without additional compensation, conduct a meeting with the Owner to review the facility operations and performance.

## **ARTICLE 4 SUPPLEMENTAL AND ADDITIONAL SERVICES**

### **§ 4.1 Supplemental Services**

**§ 4.1.1** The services listed below are not included in Basic Services but may be required for the Project. The Architect shall provide the listed Supplemental Services only if specifically designated in the table below as the Architect's responsibility, and the Owner shall compensate the Architect as provided in Section 11.2. Unless

otherwise specifically addressed in this Agreement, if neither the Owner nor the Architect is designated, the parties agree that the listed Supplemental Service is not being provided for the Project.  
*(Designate the Architect's Supplemental Services and the Owner's Supplemental Services required for the Project by indicating whether the Architect or Owner shall be responsible for providing the identified Supplemental Service. Insert a description of the Supplemental Services in Section 4.1.2 below or attach the description of services as an exhibit to this Agreement.)*

<b>Supplemental Services</b>	<b>Responsibility</b> <i>(Architect, Owner, or not provided)</i>
§ 4.1.1.1 Assistance with Selection of Construction Manager	Owner
§ 4.1.1.2 Programming	Architect
§ 4.1.1.3 Multiple Preliminary Designs	N/A
§ 4.1.1.4 Measured drawings	Owner
§ 4.1.1.5 Existing site surveys	Architect
§ 4.1.1.6 Site evaluation and planning	N/A
§ 4.1.1.7 Building Information Model management responsibilities	N/A
§ 4.1.1.8 Development of Building Information Models for post construction use	N/A
§ 4.1.1.9 Civil engineering	N/A
§ 4.1.1.10 Landscape design	N/A
§ 4.1.1.11 Architectural interior design	N/A
§ 4.1.1.12 Value analysis	N/A
§ 4.1.1.13 Programmatic cost estimating	Architect
§ 4.1.1.14 On-site project representation	N/A
§ 4.1.1.15 Conformed documents for construction	N/A
§ 4.1.1.16 As-designed record drawings	N/A
§ 4.1.1.17 As-constructed record drawings	Owner
§ 4.1.1.18 Post-occupancy evaluation	N/A
§ 4.1.1.19 Facility support services	N/A
§ 4.1.1.20 Tenant-related services	N/A
§ 4.1.1.21 Architect's coordination of the Owner's consultants	Architect
§ 4.1.1.22 Telecommunications/data design	Owner
§ 4.1.1.23 Security evaluation and planning	Owner
§ 4.1.1.24 Commissioning	Owner
§ 4.1.1.25 Sustainable Project Services pursuant to Section 4.1.3	N/A
§ 4.1.1.26 Historic preservation	N/A
§ 4.1.1.27 Furniture, furnishings, and equipment design	Owner
§ 4.1.1.28 Other services provided by specialty Consultants	Architect
§ 4.1.1.29 Other Supplemental Services	Architect

#### § 4.1.2 Description of Supplemental Services

§ 4.1.2.1 A description of each Supplemental Service identified in Section 4.1.1 as the Architect's responsibility is provided below.

*(Describe in detail the Architect's Supplemental Services identified in Section 4.1.1 or, if set forth in an exhibit, identify the exhibit. The AIA publishes a number of Standard Form of Architect's Services documents that can be included as an exhibit to describe the Architect's Supplemental Services.)*

§ 4.1.1.2 Programming: Prior to initiation of Schematic Design, the Architect will provide programming services that will document the needs, goals and constraints for the school. The programming will include defining

the project objectives, enumerating required spaces and their relationships, establishing design criteria, identifying site and context constraints, and developing a budget. Programming will have an emphasis on maximizing the efficiency of existing facilities and limiting new additions to essential requirements. See Exhibit B for the programming fee which includes consultants. Also in exhibit B is a cost for estimating in the programming phase.

§ 4.1.1.5 Existing Site Surveys: The Architect shall furnish surveys to describe physical characteristics, legal limitations and utility locations for the site of the Project, and a written legal description of the site. The surveys and legal information shall include, as applicable, grades and lines of streets, alleys, pavements and adjoining property and structures; designated wetlands; adjacent drainage; rights-of-way, restrictions, easements, encroachments, zoning, deed restrictions, boundaries and contours of the site; locations, dimensions, and other necessary data with respect to existing buildings, other improvements and trees; and information concerning available utility services and lines, both public and private, above and below grade, including inverts and depths. All the information on the survey shall be referenced to a Project benchmark.

§ 4.1.1.9 Civil Engineering: The Architect will provide Civil Engineering as a part of Architect's Basic Services.

§ 4.1.1.10 Landscape Design: The Architect will provide Landscape Design as a part of Architect's Basic Services.

§ 4.1.1.13 Programmatic cost estimating: The Architect will provide cost estimating during programming as a Supplemental Service.

§ 4.1.1.21 Architect's coordination of the Owner's consultants: The Architect will coordinate with Owner's Consultants including hazardous materials, security, fire alarm, and data consultants.

§ 4.1.1.28 Other services provided by specialty consultants: The Architect will provide the following specialty consultants as part of Basic Services: Food Service Consulting and Code Consulting for ADA and Accessibility.

§ 4.1.1.29 Other Supplemental Services: These services may include Geotechnical Reports, a Wetland Delineation, a Tree Study, and a Traffic Study. The Architect shall furnish services of geotechnical engineers, which may include test borings, test pits, determinations of soil bearing values, percolation tests, evaluations of hazardous materials, seismic evaluation, ground corrosion tests and resistivity tests, including necessary operations for anticipating subsoil conditions, with written reports and appropriate recommendations.

§ 4.1.2.2 A description of each Supplemental Service identified in Section 4.1.1 as the Owner's responsibility is provided below.

*(Describe in detail the Owner's Supplemental Services identified in Section 4.1.1 or, if set forth in an exhibit, identify the exhibit.)*

§ 4.1.1.1 Assistance with Selection of Construction Manager: The Owner will be responsible for selecting a Construction Manager. The Architect will not attend interviews, but will assist in evaluating proposals and the draft contract.

§ 4.1.1.4 Measured drawings: The Owner will provide measured drawings of all facilities.

§ 4.1.1.5 Existing facilities surveys: The Owner will provide existing facilities site surveys. The Architect will assist in soliciting existing facilities site surveys.

§ 4.1.1.17 As-constructed record drawings: The Owner's Construction Manager will provide final as-constructed record drawings.

§ 4.1.1.22 Telecommunications/data design: The Owner will retain telecommunications/data design consultants. The Architect will coordinate with the Owner's consultant.

§ 4.1.1.23 Security evaluation and planning: The Owner will retain security planning consultants. The Architect will coordinate with the Owner's consultant.

§ 4.1.1.24 Commissioning: If needed, the Owner will provide commissioning services.

§ 4.1.1.27 Furniture, furnishings, and equipment design: Owner will provide furniture, furnishings, and equipment design. Furniture, furnishings, and equipment are not considered part of the Cost of the Work.

§ 4.1.3 If the Owner identified a Sustainable Objective in Article 1, the Architect shall provide, as a Supplemental Service, the Sustainability Services required in AIA Document E234™-2019, Sustainable Projects Exhibit, Construction Manager as Constructor Edition, attached to this Agreement. The Owner shall compensate the Architect as provided in Section 11.2.

## § 4.2 Architect's Additional Services

The Architect may provide Additional Services after execution of this Agreement without invalidating the Agreement. Except for services required due to the fault of the Architect, any Additional Services provided in accordance with this Section 4.2 shall entitle the Architect to compensation pursuant to Section 11.3 and an appropriate adjustment in the Architect's schedule.

**§ 4.2.1** Upon recognizing the need to perform the following Additional Services, the Architect shall notify the Owner with reasonable promptness and explain the facts and circumstances giving rise to the need. The Architect shall not proceed to provide the following Additional Services until the Architect receives the Owner's written authorization:

- .1 Services necessitated by a change in the Initial Information, previous instructions or recommendations given by the Construction Manager or the Owner, approvals given by the Owner, or a material change in the Project including size, quality, complexity, the Owner's schedule or budget for Cost of the Work, or bid packages in addition to those listed in Section 1.1.6;
- .2 Making revisions in Drawings, Specifications, or other documents (as required pursuant to Section 6.7), when such revisions are required because the Construction Manager's estimate of the Cost of the Work, Guaranteed Maximum Price proposal, or Control Estimate exceeds the Owner's budget, except where such excess is due to changes initiated by the Architect in scope, capacities of basic systems, or the kinds and quality of materials, finishes, or equipment;
- .3 Services necessitated by the enactment or revision of codes, laws, or regulations, including changing or editing previously prepared Instruments of Service;
- .4 Changing or editing previously prepared Instruments of Service necessitated by official interpretations of applicable codes, laws or regulations that are either (a) contrary to specific interpretations by the applicable authorities having jurisdiction made prior to the issuance of the building permit, or (b) contrary to requirements of the Instruments of Service when those Instruments of Service were prepared in accordance with the applicable standard of care;
- .5 Services necessitated by decisions of the Owner or Construction Manager not rendered in a timely manner or any other failure of performance on the part of the Owner or the Owner's consultants or contractors;
- .6 Preparing digital models or other design documentation for transmission to the Owner's consultants and contractors, or to other Owner- authorized recipients;
- .7 Preparation of design and documentation for alternate bid or proposal requests proposed by the Owner or Construction Manager;
- .8 Preparation for, and attendance at, a public presentation, meeting or hearing;
- .9 Preparation for, and attendance at, a dispute resolution proceeding or legal proceeding, except where the Architect is party thereto;
- .10 Consultation concerning replacement of Work resulting from fire or other cause during construction; or
- .11 Assistance to the Initial Decision Maker, if other than the Architect;
- .12 Services necessitated by replacement of the Construction Manager or conversion of the Construction Manager as constructor project delivery method to an alternative project delivery method;
- .13 Services necessitated by the Owner's delay in engaging the Construction Manager;
- .14 Making revisions to the Drawings, Specifications, and other documents resulting from agreed-upon assumptions and clarifications included in the Guaranteed Maximum Price Amendment or Control Estimate; and
- .15 Making revisions to the Drawings, Specifications, and other documents resulting from substitutions included in the Guaranteed Maximum Price Amendment or Control Estimate.
- .16 Preparing more than three (3) bid packages of documents, as further described in § 1.1.6.
- .17 Preparing measured documents when accurate as-built existing conditions documents are not available from the Owner in digital format.

**§ 4.2.2** To avoid delay in the Construction Phase, the Architect shall provide the following Additional Services, notify the Owner with reasonable promptness, and explain the facts and circumstances giving rise to the need. If, upon receipt of the Architect's notice, the Owner determines that all or parts of the services are not required, the Owner shall give prompt written notice to the Architect of the Owner's determination. The Owner shall compensate the Architect for the services provided prior to the Architect's receipt of the Owner's notice:

- .1 Reviewing a Construction Manager's submittal out of sequence from the submittal schedule approved by the Architect;
- .2 Responding to the Construction Manager's requests for information that are not prepared in accordance with the Contract Documents or where such information is available to the Construction Manager from a careful study and comparison of the Contract Documents, field conditions, other Owner-provided information, Construction Manager-prepared coordination drawings, or prior

- Project correspondence or documentation;
- .3 Preparing Change Orders, and Construction Change Directives that require evaluation of the Construction Manager's proposals and supporting data, or the preparation or revision of Instruments of Service;
- .4 Evaluating an extensive number of Claims as the Initial Decision Maker; or
- .5 Evaluating substitutions proposed by the Owner or Construction Manager and making subsequent revisions to Instruments of Service resulting therefrom.

§ 4.2.3 The Architect shall provide Construction Phase Services exceeding the limits set forth below as Additional Services. When the limits below are reached, the Architect shall notify the Owner:

- .1 Two ( 2 ) reviews of each Shop Drawing, Product Data item, sample and similar submittals of the Construction Manager
- .2 Thirty Six ( 36 ) visits to the site by the Architect during construction
- .3 Two ( 2 ) inspections for any portion of the Work to determine whether such portion of the Work is substantially complete in accordance with the requirements of the Contract Documents
- .4 Two ( 2 ) inspections for any portion of the Work to determine final completion

§ 4.2.4 Except for services required under Section 3.6.6.5 and those services that do not exceed the limits set forth in Section 4.2.3, Construction Phase Services provided more than 60 days after (1) the date of Substantial Completion of the Work or (2) the initial date of Substantial Completion identified in the agreement between the Owner and Contractor, whichever is earlier, shall be compensated as Additional Services to the extent the Architect incurs additional cost in providing those Construction Phase Services.

§ 4.2.5 If the services covered by this Agreement have not been completed within thirty ( 30 ) months of the date of this Agreement, through no fault of the Architect, extension of the Architect's services beyond that time shall be compensated as Additional Services.

## ARTICLE 5 OWNER'S RESPONSIBILITIES

§ 5.1 Unless otherwise provided for under this Agreement, the Owner shall provide information in a timely manner regarding requirements for and limitations on the Project, including a written program which shall set forth the Owner's objectives; schedule; constraints and criteria, including space requirements and relationships; flexibility; expandability; special equipment; systems; and site requirements.

§ 5.2 The Owner shall retain a Construction Manager to provide services, duties, and responsibilities as described in the agreement selected in Section 1.1.5.

§ 5.3 The Owner shall establish the Owner's budget for the Project, including (1) the budget for the Cost of the Work as defined in Section 6.1; (2) the Owner's other costs; and, (3) reasonable contingencies related to all of these costs. The Owner shall update the Owner's budget for the Project as necessary throughout the duration of the Project until final completion. If the Owner significantly increases or decreases the Owner's budget for the Cost of the Work, the Owner shall notify the Architect and Construction Manager. The Owner and the Architect, in consultation with the Construction Manager, shall thereafter agree to a corresponding change in the Project's scope and quality.

§ 5.3.1 The Owner acknowledges that accelerated, phased or fast-track scheduling provides a benefit, but also carries with it associated risks. Such risks include the Owner incurring costs for the Architect to coordinate and redesign portions of the Project affected by procuring or installing elements of the Project prior to the completion of all relevant Construction Documents, and costs for the Construction Manager to remove and replace previously installed Work. If the Owner selects accelerated, phased or fast-track scheduling, the Owner agrees to include in the budget for the Project sufficient contingencies to cover such costs.

§ 5.4 The Owner shall identify a representative authorized to act on the Owner's behalf with respect to the Project. The Owner shall render decisions and approve the Architect's submittals in a timely manner in order to avoid unreasonable delay in the orderly and sequential progress of the Architect's services.

§ 5.7 The Owner shall provide the Supplemental Services designated as the Owner's responsibility in Section 4.1.1.

§ 5.8 If the Owner identified a Sustainable Objective in Article 1, the Owner shall fulfill its responsibilities as required in AIA Document E234™–2019, Sustainable Projects Exhibit, Construction Manager as Constructor Edition, attached to this Agreement.

§ 5.9 The Owner shall coordinate the services of its own consultants with those services provided by the Architect. Upon the Architect's request, the Owner shall furnish copies of the scope of services in the contracts between the Owner and the Owner's consultants. The Owner shall furnish the services of consultants other than those designated as the responsibility of the Architect in this Agreement, or authorize the Architect to furnish them as an Additional Service, when the Architect requests such services and demonstrates that they are reasonably required by the scope of the Project. The Owner shall require that its consultants and contractors maintain insurance, including professional liability insurance, as appropriate to the services or work provided.

§ 5.10 The Owner shall furnish tests, inspections and reports required by law or the Contract Documents, such as structural, mechanical, and chemical tests, tests for air and water pollution, and tests for hazardous materials. The architect will provide the geotechnical testing for design purposes prior to construction. The owner will provide the testing and inspections during construction.

§ 5.11 The Owner shall furnish all legal, insurance and accounting services, including auditing services, that may be reasonably necessary at any time for the Project to meet the Owner's needs and interests.

§ 5.12 The Owner shall provide prompt written notice to the Architect and Construction Manager if the Owner becomes aware of any fault or defect in the Project, including errors, omissions or inconsistencies in the Architect's Instruments of Service.

§ 5.13 The Owner shall include the Architect in all communications with the Construction Manager that relate to or affect the Architect's services or professional responsibilities. The Owner shall promptly notify the Architect of the substance of any direct communications between the Owner and the Construction Manager otherwise relating to the Project. Communications by and with the Architect's consultants shall be through the Architect.

§ 5.14 The Owner shall coordinate the Architect's duties and responsibilities set forth in the Agreement between the Owner and the Construction Manager with the Architect's services set forth in this Agreement. The Owner shall provide the Architect a copy of the executed agreement between the Owner and Construction Manager, including the General Conditions of the Contract for Construction.

§ 5.15 The Owner shall provide the Architect access to the Project site prior to commencement of the Work and shall obligate the Construction Manager to provide the Architect access to the Work wherever it is in preparation or progress.

§ 5.16 Within 15 days after receipt of a written request from the Architect, the Owner shall furnish the requested information as necessary and relevant for the Architect to evaluate, give notice of, or enforce lien rights.

## ARTICLE 6 COST OF THE WORK

§ 6.1 For purposes of this Agreement, the Cost of the Work shall be the total cost to the Owner to construct all elements of the Project designed or specified by the Architect and shall include the Construction Manager's general conditions costs, overhead, and profit. The Cost of the Work also includes the reasonable value of labor, materials, and equipment donated to, or otherwise furnished by, the Owner. The Cost of the Work does not include the compensation of the Architect; the compensation of the Construction Manager for Preconstruction Phase services; the costs of the land, rights-of-way, financing, or contingencies for changes in the Work; or other costs that are the responsibility of the Owner.

§ 6.2 The Owner's budget for the Cost of the Work is provided in the Initial Information and shall be adjusted throughout the Project as required under Sections 5.3 and 6.4. Evaluations of the Owner's budget for the Cost of the Work represent the Architect's judgment as a design professional.

§ 6.3 The Owner shall require the Construction Manager to include appropriate contingencies for design, bidding or negotiating, price escalation, and market conditions in estimates of the Cost of the Work. The Architect shall be entitled to rely on the accuracy and completeness of estimates of the Cost of the Work the Construction Manager prepares as the Architect progresses with its Basic Services. The Architect shall prepare, as an Additional Service, revisions to the Drawings, Specifications or other documents required due to the Construction Manager's

inaccuracies or incompleteness in preparing cost estimates, or due to market conditions the Architect could not reasonably anticipate. The Architect may review the Construction Manager's estimates solely for the Architect's guidance in completion of its services, however, the Architect shall report to the Owner any material inaccuracies and inconsistencies noted during any such review.

§ 6.3.1 If the Architect is providing cost estimating services as a Supplemental Service, and a discrepancy exists between the Construction Manager's cost estimates and the Architect's cost estimates, the Architect and the Construction Manager shall work together to reconcile the cost estimates.

§ 6.4 If, prior to the conclusion of the Design Development Phase, the Construction Manager's estimate of the Cost of the Work exceeds the Owner's budget for the Cost of the Work, the Architect, in consultation with the Construction Manager, shall make appropriate recommendations to the Owner to adjust the Project's size, quality or budget for the Cost of the Work, and the Owner shall cooperate with the Architect in making such adjustments.

§ 6.5 If the Construction Manager's estimate of the Cost of the Work at the conclusion of the Design Development Phase exceeds the Owner's budget for the Cost of the Work, the Owner shall

- .1 give written approval of an increase in the budget for the Cost of the Work;
- .2 terminate in accordance with Section 9.5;
- .3 in consultation with the Architect and Construction Manager, revise the Project program, scope, or quality as required to reduce the Cost of the Work; or
- .4 implement any other mutually acceptable alternative.

§ 6.6 If the Owner chooses to proceed under Section 6.5.3, the Architect, without additional compensation, shall incorporate the revisions in the Construction Documents Phase as necessary to comply with the Owner's budget for the Cost of the Work at the conclusion of the Design Development Phase Services, or the budget as adjusted under Section 6.5.1. The Architect's revisions in the Construction Documents Phase shall be the limit of the Architect's responsibility under this Article 6.

§ 6.7 After incorporation of modifications under Section 6.6, the Architect shall, as an Additional Service, make any required revisions to the Drawings, Specifications or other documents necessitated by the Construction Manager's subsequent cost estimates, the Guaranteed Maximum Price proposal, or Control Estimate that exceed the Owner's budget for the Cost of the Work, except when the excess is due to changes initiated by the Architect in scope, basic systems, or the kinds and quality of materials, finishes or equipment.

## **ARTICLE 7 COPYRIGHTS AND LICENSES**

§ 7.1 The Architect and the Owner warrant that in transmitting Instruments of Service, or any other information, the transmitting party is the copyright owner of such information or has permission from the copyright owner to transmit such information for its use on the Project.

§ 7.2 The Architect and the Architect's consultants shall be deemed the authors and owners of their respective Instruments of Service, including the Drawings and Specifications, and shall retain all common law, statutory and other reserved rights, including copyrights. Submission or distribution of Instruments of Service to meet official regulatory requirements or for similar purposes in connection with the Project is not to be construed as publication in derogation of the reserved rights of the Architect and the Architect's consultants.

§ 7.3 The Architect grants to the Owner a nonexclusive license to use the Architect's Instruments of Service solely and exclusively for purposes of constructing, using, maintaining, altering and adding to the Project, provided that the Owner substantially performs its obligations under this Agreement, including prompt payment of all sums due, pursuant to Article 9 and Article 11. The Architect shall obtain similar nonexclusive licenses from the Architect's consultants consistent with this Agreement. The license granted under this section permits the Owner to authorize the Construction Manager, Subcontractors, Sub-subcontractors, and suppliers, as well as the Owner's consultants and separate contractors, to reproduce applicable portions of the Instruments of Service, subject to any protocols established pursuant to Section 1.3, solely and exclusively for use in performing services or construction for the Project. If the Architect rightfully terminates this Agreement for cause as provided in Section 9.4, the license granted in this Section 7.3 shall terminate.

§ 7.3.1 In the event the Owner uses the Instruments of Service without retaining the authors of the Instruments of Service, the Owner releases the Architect and Architect's consultant(s) from all claims and causes of action arising from such uses. The Owner, to the extent permitted by law, further agrees to indemnify and hold harmless the

Architect and its consultants from all costs and expenses, including the cost of defense, related to claims and causes of action asserted by any third person or entity to the extent such costs and expenses arise from the Owner's use of the Instruments of Service under this Section 7.3.1. The terms of this Section 7.3.1 shall not apply if the Owner rightfully terminates this Agreement for cause under Section 9.4.

**§ 7.4** Except for the licenses granted in this Article 7, no other license or right shall be deemed granted or implied under this Agreement. The Owner shall not assign, delegate, sublicense, pledge or otherwise transfer any license granted herein to another party without the prior written agreement of the Architect. Any unauthorized use of the Instruments of Service shall be at the Owner's sole risk and without liability to the Architect and the Architect's consultants.

**§ 7.5** Except as otherwise stated in Section 7.3, the provisions of this Article 7 shall survive the termination of this Agreement.

## **ARTICLE 8 CLAIMS AND DISPUTES**

### **§ 8.1 General**

**§ 8.1.1** The Owner and Architect shall commence all claims and causes of action against the other and arising out of or related to this Agreement, whether in contract, tort, or otherwise, in accordance with the requirements of the binding dispute resolution method selected in this Agreement and within the period specified by applicable law, but in any case not more than 10 years after the date of Substantial Completion of the Work. The Owner and Architect waive all claims and causes of action not commenced in accordance with this Section 8.1.1.

**§ 8.1.2** To the extent damages are covered by property insurance, the Owner and Architect waive all rights against each other and against the contractors, consultants, agents and employees of the other for damages, except such rights as they may have to the proceeds of such insurance as set forth in AIA Document A201-2017, General Conditions of the Contract for Construction. The Owner or the Architect, as appropriate, shall require of the Construction Manager, contractors, consultants, agents and employees of any of them, similar waivers in favor of the other parties enumerated herein.

**§ 8.1.3** The Architect shall indemnify and hold the Owner and the Owner's officers and employees harmless from and against damages, losses and judgments arising from claims by third parties, including reasonable attorneys' fees and expenses recoverable under applicable law, but only to the extent they are caused by the negligent acts or omissions of the Architect, its employees and its consultants in the performance of professional services under this Agreement. The Architect's obligation to indemnify and hold the Owner and the Owner's officers and employees harmless does not include a duty to defend. The Architect's duty to indemnify the Owner under this Section 8.1.3 shall be limited to the available proceeds of the insurance coverage required by this Agreement.

**§ 8.1.4** The Architect and Owner waive consequential damages for claims, disputes, or other matters in question arising out of or relating to this Agreement. This mutual waiver is applicable, without limitation, to all consequential damages due to either party's termination of this Agreement, except as specifically provided in Section 9.7.

### **§ 8.2 Mediation**

**§ 8.2.1** Any claim, dispute, or other matter in question arising out of or related to this Agreement shall be subject to mediation as a condition precedent to binding dispute resolution. If such matter relates to or is the subject of a lien arising out of the Architect's services, the Architect may proceed in accordance with applicable law to comply with the lien notice or filing deadlines prior to resolution of the matter by mediation or by binding dispute resolution.

**§ 8.2.2** The Owner and Architect shall endeavor to resolve claims, disputes and other matters in question between them by mediation, which, unless the parties mutually agree otherwise, shall be administered by the American Arbitration Association in accordance with its Construction Industry Mediation Procedures in effect on the date of this Agreement. A request for mediation shall be made in writing, delivered to the other party to this Agreement, and filed with the person or entity administering the mediation. The request may be made concurrently with the filing of a complaint or other appropriate demand for binding dispute resolution but, in such event, mediation shall proceed in advance of binding dispute resolution proceedings, which shall be stayed pending mediation for a period of 60 days from the date of filing, unless stayed for a longer period by agreement of the parties or court order. If an arbitration proceeding is stayed pursuant to this section, the parties may nonetheless proceed to the selection of the arbitrator(s) and agree upon a schedule for later proceedings.

§ 8.2.3 The parties shall share the mediator's fee and any filing fees equally. The mediation shall be held in the place where the Project is located, unless another location is mutually agreed upon. Agreements reached in mediation shall be enforceable as settlement agreements in any court having jurisdiction thereof.

§ 8.2.4 If the parties do not resolve a dispute through mediation pursuant to this Section 8.2, the method of binding dispute resolution shall be the following:

*(Check the appropriate box.)*

- Arbitration pursuant to Section 8.3 of this Agreement
- Litigation in a court of competent jurisdiction
- Other: *(Specify)*

If the Owner and Architect do not select a method of binding dispute resolution, or do not subsequently agree in writing to a binding dispute resolution method other than litigation, the dispute will be resolved in a court of competent jurisdiction.

### § 8.3 Arbitration

§ 8.3.1 If the parties have selected arbitration as the method for binding dispute resolution in this Agreement, any claim, dispute or other matter in question arising out of or related to this Agreement subject to, but not resolved by, mediation shall be subject to arbitration, which, unless the parties mutually agree otherwise, shall be administered by the American Arbitration Association in accordance with its Construction Industry Arbitration Rules in effect on the date of this Agreement. A demand for arbitration shall be made in writing, delivered to the other party to this Agreement, and filed with the person or entity administering the arbitration.

§ 8.3.1.1 A demand for arbitration shall be made no earlier than concurrently with the filing of a request for mediation, but in no event shall it be made after the date when the institution of legal or equitable proceedings based on the claim, dispute or other matter in question would be barred by the applicable statute of limitations. For statute of limitations purposes, receipt of a written demand for arbitration by the person or entity administering the arbitration shall constitute the institution of legal or equitable proceedings based on the claim, dispute or other matter in question.

§ 8.3.2 The foregoing agreement to arbitrate, and other agreements to arbitrate with an additional person or entity duly consented to by parties to this Agreement, shall be specifically enforceable in accordance with applicable law in any court having jurisdiction thereof.

§ 8.3.3 The award rendered by the arbitrator(s) shall be final, and judgment may be entered upon it in accordance with applicable law in any court having jurisdiction thereof.

### § 8.3.4 Consolidation or Joinder

§ 8.3.4.1 Either party, at its sole discretion, may consolidate an arbitration conducted under this Agreement with any other arbitration to which it is a party provided that (1) the arbitration agreement governing the other arbitration permits consolidation; (2) the arbitrations to be consolidated substantially involve common questions of law or fact; and (3) the arbitrations employ materially similar procedural rules and methods for selecting arbitrator(s).

§ 8.3.4.2 Either party, at its sole discretion, may include by joinder persons or entities substantially involved in a common question of law or fact whose presence is required if complete relief is to be accorded in arbitration, provided that the party sought to be joined consents in writing to such joinder. Consent to arbitration involving an additional person or entity shall not constitute consent to arbitration of any claim, dispute or other matter in question not described in the written consent.

§ 8.3.4.3 The Owner and Architect grant to any person or entity made a party to an arbitration conducted under this Section 8.3, whether by joinder or consolidation, the same rights of joinder and consolidation as the Owner and Architect under this Agreement.

§ 8.4 The provisions of this Article 8 shall survive the termination of this Agreement.

#### ARTICLE 9 TERMINATION OR SUSPENSION

§ 9.1 If the Owner fails to make payments to the Architect in accordance with this Agreement, such failure shall be considered substantial nonperformance and cause for termination or, at the Architect's option, cause for suspension of performance of services under this Agreement. If the Architect elects to suspend services, the Architect shall give seven days' written notice to the Owner before suspending services. In the event of a suspension of services, the Architect shall have no liability to the Owner for delay or damage caused the Owner because of such suspension of services. Before resuming services, the Owner shall pay the Architect all sums due prior to suspension and any expenses incurred in the interruption and resumption of the Architect's services. The Architect's fees for the remaining services and the time schedules shall be equitably adjusted.

§ 9.2 If the Owner suspends the Project, the Architect shall be compensated for services performed prior to notice of such suspension. When the Project is resumed, the Architect shall be compensated for expenses incurred in the interruption and resumption of the Architect's services. The Architect's fees for the remaining services and the time schedules shall be equitably adjusted.

§ 9.3 If the Owner suspends the Project for more than 90 cumulative days for reasons other than the fault of the Architect, the Architect may terminate this Agreement by giving not less than seven days' written notice.

§ 9.4 Either party may terminate this Agreement upon not less than seven days' written notice should the other party fail substantially to perform in accordance with the terms of this Agreement through no fault of the party initiating the termination.

§ 9.5 The Owner may terminate this Agreement upon not less than seven days' written notice to the Architect for the Owner's convenience and without cause.

§ 9.6 If the Owner terminates this Agreement for its convenience pursuant to Section 9.5, or the Architect terminates this Agreement pursuant to Section 9.3, the Owner shall compensate the Architect for services performed prior to termination, Reimbursable Expenses incurred, and costs attributable to termination, including the costs attributable to the Architect's termination of consultant agreements.

§ 9.7 In addition to any amounts paid under Section 9.6, if the Owner terminates this Agreement for its convenience pursuant to Section 9.5, or the Architect terminates this Agreement pursuant to Section 9.3, the Owner shall pay to the Architect the following fees:  
*(Set forth below the amount of any termination or licensing fee, or the method for determining any termination or licensing fee.)*

.1 Termination Fee:

Ten Percent (10%) of any unbilled remainder of the total fee based on Cost of the Work at the time of, and in the event of, termination.

.2 Licensing Fee if the Owner intends to continue using the Architect's Instruments of Service:

Will be negotiated at the time of, and in the event of, termination.

§ 9.8 Except as otherwise expressly provided herein, this Agreement shall terminate one year from the date of Substantial Completion.

§ 9.9 The Owner's rights to use the Architect's Instruments of Service in the event of a termination of this Agreement are set forth in Article 7 and Section 9.7.

#### ARTICLE 10 MISCELLANEOUS PROVISIONS

§ 10.1 This Agreement shall be governed by the law of the place where the Project is located, excluding that jurisdiction's choice of law rules. If the parties have selected arbitration as the method of binding dispute resolution, the Federal Arbitration Act shall govern Section 8.3.

§ 10.2 Terms in this Agreement shall have the same meaning as those in AIA Document A201–2017, General Conditions of the Contract for Construction, except as modified in this Agreement. The term “Contractor” as used in A201–2017 shall mean the Construction Manager.

§ 10.3 The Owner and Architect, respectively, bind themselves, their agents, successors, assigns, and legal representatives to this Agreement. Neither the Owner nor the Architect shall assign this Agreement without the written consent of the other, except that the Owner may assign this Agreement to a lender providing financing for the Project if the lender agrees to assume the Owner’s rights and obligations under this Agreement, including any payments due to the Architect by the Owner prior to the assignment.

§ 10.4 If the Owner requests the Architect to execute certificates, the proposed language of such certificates shall be submitted to the Architect for review at least 14 days prior to the requested dates of execution. If the Owner requests the Architect to execute consents reasonably required to facilitate assignment to a lender, the Architect shall execute all such consents that are consistent with this Agreement, provided the proposed consent is submitted to the Architect for review at least 14 days prior to execution. The Architect shall not be required to execute certificates or consents that would require knowledge, services, or responsibilities beyond the scope of this Agreement.

§ 10.5 Nothing contained in this Agreement shall create a contractual relationship with, or a cause of action in favor of, a third party against either the Owner or Architect.

§ 10.6 Unless otherwise required in this Agreement, the Architect shall have no responsibility for the discovery, presence, handling, removal or disposal of, or exposure of persons to, hazardous materials or toxic substances in any form at the Project site.

§ 10.7 The Architect shall have the right to include photographic or artistic representations of the design of the Project among the Architect’s promotional and professional materials. The Architect shall be given reasonable access to the completed Project to make such representations. However, the Architect’s materials shall not include the Owner’s confidential or proprietary information if the Owner has previously advised the Architect in writing of the specific information considered by the Owner to be confidential or proprietary. The Owner shall provide professional credit for the Architect in the Owner’s promotional materials for the Project. This Section 10.7 shall survive the termination of this Agreement unless the Owner terminates this Agreement for cause pursuant to Section 9.4.

§ 10.8 If the Architect or Owner receives information specifically designated as “confidential” or “business proprietary,” the receiving party shall keep such information strictly confidential and shall not disclose it to any other person except as set forth in Section 10.8.1. This Section 10.8 shall survive the termination of this Agreement.

§ 10.8.1 The receiving party may disclose “confidential” or “business proprietary” information after 7 days’ notice to the other party, when required by law, arbitrator’s order, or court order, including a subpoena or other form of compulsory legal process issued by a court or governmental entity, or to the extent such information is reasonably necessary for the receiving party to defend itself in any dispute. The receiving party may also disclose such information to its employees, consultants, or contractors in order to perform services or work solely and exclusively for the Project, provided those employees, consultants and contractors are subject to the restrictions on the disclosure and use of such information as set forth in this Section 10.8.

§ 10.9 The invalidity of any provision of the Agreement shall not invalidate the Agreement or its remaining provisions. If it is determined that any provision of the Agreement violates any law, or is otherwise invalid or unenforceable, then that provision shall be revised to the extent necessary to make that provision legal and enforceable. In such case the Agreement shall be construed, to the fullest extent permitted by law, to give effect to the parties’ intentions and purposes in executing the Agreement.

## ARTICLE 11 COMPENSATION

§ 11.1 For the Architect’s Basic Services described under Article 3, the Owner shall compensate the Architect as follows:

### .1 Stipulated Sum

*(Insert amount)*

**.2 Percentage Basis**  
*(Insert percentage value)*

( ) % of the Owner's budget for the Cost of the Work, as calculated in accordance with Section 11.6.

**.3 Other**  
*(Describe the method of compensation)*

The sum of the following:  
1.25 X 35 ÷ (log(Renovation Cost)-1.15)  
1.00 X 35 ÷ (log(New Construction Cost)-1.15)

Where "New Construction Cost" is the Cost of the Work as defined in § 6.1 and allocable to work that is not within the existing school building, and "Renovation Cost" is the Cost of the Work as defined in § 6.1 and not included in "New Construction Cost."

The initial compensation amount, based on the Initial Cost of the Work, is \$2,022,711.74 and is further described in Exhibit B - Project Budget and Fee Schedule.

**§ 11.2** For the Architect's Supplemental Services designated in Section 4.1.1 and for any Sustainability Services required pursuant to Section 4.1.3, the Owner shall compensate the Architect as follows:  
*(Insert amount of, or basis for, compensation. If necessary, list specific services to which particular methods of compensation apply.)*

The Architect will bill the Owner the actual cost of the following supplemental services plus 10% markup: Geotechnical Reports, a Wetland Delineation, a Tree Study, and a Traffic Study.

**§ 11.3** For Additional Services that may arise during the course of the Project, including those under Section 4.2, the Owner shall compensate the Architect as follows:  
*(Insert amount of, or basis for, compensation.)*

If Additional Services are required, the Architect shall prepare a written proposal describing the scope of such services and the associated compensation. The Owner's written authorization shall be required prior to the Architect's commencement of Additional Services. Compensation for Additional Services shall be established either on a stipulated sum or on an hourly basis in accordance with the Architect's standard rates, as set forth in this Agreement.

**§ 11.4** Compensation for Supplemental and Additional Services of the Architect's consultants when not included in Sections 11.2 or 11.3, shall be the amount invoiced to the Architect plus Ten percent ( 10 %), or as follows:  
*(Insert amount of, or basis for computing, Architect's consultants' compensation for Supplemental or Additional Services.)*

**§ 11.5** When compensation for Basic Services is based on a stipulated sum or a percentage basis, the proportion of compensation for each phase of services shall be as follows:

Schematic Design Phase	Twenty	percent ( 20 %)
Design Development Phase	Twenty-Five	percent ( 25 %)
Construction Documents Phase	Thirty	percent ( 30 %)
Bidding and Negotiation Phase	Five	percent ( 5 %)
Construction Phase	Twenty	percent ( 20 %)
<b>Total Basic Compensation</b>	<b>one hundred percent</b>	<b>( 100.00 %)</b>

The Owner acknowledges that with an accelerated Project delivery, multiple bid package process, or Construction Manager as constructor project delivery method, the Architect may be providing its services in multiple Phases simultaneously. Therefore, the Architect shall be permitted to invoice monthly in proportion to services performed in each Phase of Services, as appropriate.

**§ 11.6** When compensation identified in Section 11.1 is on a percentage basis, progress payments for each phase of Basic Services shall be calculated by multiplying the percentages identified in this Article by the Owner's most recent budget for the Cost of the Work. Compensation paid in previous progress payments shall not be adjusted based on subsequent updates to the Owner's budget for the Cost of the Work.

**§ 11.6.1** When compensation is on a percentage basis and any portions of the Project are deleted or otherwise not constructed, compensation for those portions of the Project shall be payable to the extent services are performed on those portions. The Architect shall be entitled to compensation in accordance with this Agreement for all services performed whether or not the Construction Phase is commenced.

**§ 11.7** The hourly billing rates for services of the Architect and the Architect's consultants are set forth below. The rates shall be adjusted in accordance with the Architect's and Architect's consultants' normal review practices.  
*(If applicable, attach an exhibit of hourly billing rates or insert them below.)*

<b>Employee or Category</b>	<b>Rate (\$0.00)</b>
Principal	\$275/hr
Senior Staff	\$180/hr
Project Architect	\$180/hr
Project Manager	\$175/hr
Production III	\$125/hr
Production II	\$115/hr
Production I	\$100/hr
Interior Designer II	\$125/hr
Interior Designer I	\$115/hr
Administration	\$75/hr
Construction Administration Specialist	\$150/hr
Specialty Designer	\$150/hr

**§ 11.8 Compensation for Reimbursable Expenses**

**§ 11.8.1** Reimbursable Expenses are in addition to compensation for Basic, Supplemental, and Additional Services and include expenses incurred by the Architect and the Architect's consultants directly related to the Project, as follows:

- .1 Transportation and authorized out-of-town travel and subsistence;
- .2 Long distance services, dedicated data and communication services, teleconferences, Project web sites, and extranets;
- .3 Permitting and other fees required by authorities having jurisdiction over the Project;
- .4 Printing, reproductions, plots, and standard form documents;
- .5 Postage, handling, and delivery;
- .6 Expense of overtime work requiring higher than regular rates, if authorized in advance by the Owner;
- .7 Renderings, physical models, mock-ups, professional photography, and presentation materials requested by the Owner or required for the Project;
- .8 If required by the Owner, and with the Owner's prior written approval, the Architect's consultants' expenses of professional liability insurance dedicated exclusively to this Project, or the expense of additional insurance coverage or limits in excess of that normally maintained by the Architect's consultants;
- .9 All taxes levied on professional services and on reimbursable expenses;
- .10 Site office expenses;
- .11 Registration fees and any other fees charged by the Certifying Authority or by other entities as necessary to achieve the Sustainable Objective; and
- .12 Other similar Project-related expenditures.

**§ 11.8.2** For Reimbursable Expenses the compensation shall be the expenses incurred by the Architect and the Architect's consultants plus ten percent ( 10%) of the expenses incurred.

**§ 11.9 Architect's Insurance.** If the types and limits of coverage required in Section 2.6 are in addition to the types and limits the Architect normally maintains, the Owner shall pay the Architect for the additional costs incurred by the Architect for the additional coverages as set forth below:

*(Insert the additional coverages the Architect is required to obtain in order to satisfy the requirements set forth in Section 2.6, and for which the Owner shall reimburse the Architect.)*

**§ 11.10 Payments to the Architect**

**§ 11.10.1 Initial Payments**

**§ 11.10.1.1** An initial payment of Zero (\$ 0) shall be made upon execution of this Agreement and is the minimum payment under this Agreement. It shall be credited to the Owner's account in the final invoice.

**§ 11.10.2 Progress Payments**

**§ 11.10.2.1** Unless otherwise agreed, payments for services shall be made monthly in proportion to services performed. Payments are due and payable upon presentation of the Architect's invoice. Amounts unpaid thirty ( 30 ) days after the invoice date shall bear interest at the rate entered below, or in the absence thereof at the legal rate prevailing from time to time at the principal place of business of the Architect.

*(Insert rate of monthly or annual interest agreed upon.)*

5 % Five Percent

**§ 11.10.2.2** The Owner shall not withhold amounts from the Architect's compensation to impose a penalty or liquidated damages on the Architect, or to offset sums requested by or paid to contractors for the cost of changes in the Work, unless the Architect agrees or has been found liable for the amounts in a binding dispute resolution proceeding.

**§ 11.10.2.3** Records of Reimbursable Expenses, expenses pertaining to Supplemental and Additional Services, and services performed on the basis of hourly rates shall be available to the Owner at mutually convenient times.

**ARTICLE 12 SPECIAL TERMS AND CONDITIONS**

Special terms and conditions that modify this Agreement are as follows:

*(Include other terms and conditions applicable to this Agreement.)*

**§ 12.1** In no event shall any individual member, partner, officer, employee, or representative of the Architect be liable for any direct, indirect, incidental, consequential, special, punitive, or exemplary damages arising out of or in connection with the services provided under this Agreement.

**ARTICLE 13 SCOPE OF THE AGREEMENT**

**§ 13.1** This Agreement represents the entire and integrated agreement between the Owner and the Architect and supersedes all prior negotiations, representations or agreements, either written or oral. This Agreement may be amended only by written instrument signed by both the Owner and Architect.

**§ 13.2** This Agreement is comprised of the following documents identified below:

- .1 AIA Document B133™–2019, Standard Form Agreement Between Owner and Architect, Construction Manager as Constructor Edition
- .2 Building Information Modeling Exhibit, if completed:

Not Applicable

- .3 Exhibits:

*(Check the appropriate box for any exhibits incorporated into this Agreement.)*

AIA Document E234™–2019, Sustainable Projects Exhibit, Construction Manager as Constructor Edition dated as indicated below.  
*(Insert the date of the E234-2019 incorporated into this agreement.)*

Other Exhibits incorporated into this Agreement:  
*(Clearly identify any other exhibits incorporated into this Agreement, including any exhibits and scopes of services identified as exhibits in Section 4.1.2.)*

Exhibit A: Brainerd / Dalewood Facility Report dated July 22, 2024

Exhibit B: Project Budget and Fee Schedule »

Exhibit C: HK Diagrammatic Layout

- .4 Other documents:  
*(List other documents, if any, forming part of the Agreement.)*

This Agreement entered into as of the day and year first written above.

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**OWNER** *(Signature)*

BY: Weston Wamp, Mayor  
Hamilton County, Tennessee

---

*(Printed name and title)*

---

**ARCHITECT** *(Signature)*

BY: Heidi Hefferlin, AIA, HK Architects

---

*(Printed name, title, and license number if required)*

---

**OWNER** *(Signature)*

BY: Justin Robertson, Superintendent,  
HCDE

---

*(Printed name and title)*

# BRAINERD / DALEWOOD

## Facility Report

JULY 22, 2024

For:



### Hamilton County Property Management

4005 Cromwell Road, Chattanooga, TN 37421

Phone: 423-209-7960

By:

**MTa**  
ARCHITECTURE & PLANNING

**MTa**  
200 W. MLK Blvd.  
Suite 200a  
Chattanooga, TN 37402  
[www.mtarch.net](http://www.mtarch.net)



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## **PURPOSE OF THE REPORT**

MTa was hired to perform a report that included the following:

1. Task I - Defining issues impacting the remodeling of the existing building.
  - a. The report will include a narrative of redevelopment issues that will impact cost and schedule, such as:
    - i. City Ordinances.
    - ii. Current Building Code and Energy Code issues.
    - iii. ADA / ICC 117.1 accessibility issues
2. Task II – Defining issues of how the existing building may impact a particular building program.
3. Task III – Provide a listing of material serviceability concerns.
4. Task IV – Provide a summary of available program documents.
  - a. MTA will review any existing program documents. Based on this review, MTA will:
    - i. Provide an assumed combined required program area to house both the High School and the Middle School.
    - ii. Define a list of shortcomings of existing areas that will need to be resolved by future building additions.
5. Task V – Provide a listing of additional research, reports, or surveys required to minimize any delays to design or construction.

As we started to work on this report, Task I and IV were emphasized by the County and are the only Tasks provided in this abbreviated report. If requested by Hamilton County, MTA will continue to work on the full original scope of this report.

### *Special Notes to consider:*

1. *All financial costs noted in this report are indicated in today's cost. No inflation factor has been added to any cost.*
2. *MTa assumes that the valuation of the buildings (for replacement cost) / and building construction cost would escalate in an equal fashion.*
3. *This report is limited and did not include:*
  - b. *Survey or detailed as-built documentation of the existing layouts.*
  - c. *Geotechnical, Historical, or separate Environmental studies.*
6. *The construction industry continues to experience escalations of cost and shortages of materials. The cost defined in this report will be based on historical information and information provided by local contractors. MTA did have the cost reviewed and vetted by a local contracting firm but this does not guarantee the accuracy of this information beyond the date of issuance.*
7. *All financial quantities listed in this project are without any contingency.*

## **EXECUTIVE SUMMARY**

The possible liabilities for this project are summarized throughout this report. This Executive Summary is meant to highlight just the most significant issue in each of our project tasks.

### **Code:**

The requirement to provide a Storm Shelter for this school is the most significant issue in the building code. To date, the Hamilton County Department of Education has not built a storm shelter constructed to the standards required by the 2018 IBC. The cost of this added requirement will be significant and will be dependent on the size of the space required by the AHJ (authority having jurisdiction). Both the City of Chattanooga and Hamilton County have adopted current editions of the code that require a shelter in Educational Occupancies.

### **Program:**

MTa was able to identify an appropriate area for this combined school that is commensurate with Tyner Middle / High School. We believe that HCDE will need to fully vet our proposed program and determine what classes will be offered as Electives, Vocational, and Non-traditional programs. Until the proposed classes and their schedules are rectified, will we not be able to confidently determine the final new building area needed.

### **Additional Programming Requirements:**

Within the project team, several questions to the overall program have been discussed. We know this occurs in other schools but how scheduling of the following programs can effectively occur within Middle and High School programs:

1. Currently there is only one band room.
2. Currently there is only one choir room.
3. We assume that the Middle School Football will continue to use the existing locker rooms, but would it make sense to combine them in a new field house?
4. Currently there is only one baseball field. We assume a softball field will need to be provided. What other athletic facilities need to be provided or improved for this School?

## **TASK I - DEFINING ISSUES IMPACTING REMODELING**

The existing facility was built in 1959 based on the drawings by Selmon T. Franklin. Throughout the years building additions occurred to include the vocational addition that included the Auto mechanical area (1979), the vocational classroom area that includes the cosmetology area (1991), and the newest addition on the Northwest side of the campus (1993). As constructed, the conglomeration of buildings totals 157,925 SF without any modular area considered. Sitting on 53.06 acres, the parking lots were originally configured to park 456 vehicles. The property is zone R-1.

The building is a steel-framed building with masonry-bearing walls. The exterior finish is primarily masonry veneer. We would expect that this building would be considered by Authorities Having Jurisdiction (AHJ) as a Construction Type 2B - unprotected. The existing building is not sprinkled but the initial area was broken up into smaller buildings between firewalls.

This 65-year-old building still has an active "Certificate of Occupancy" however it should be noted that many of the existing systems may have exceeded their standard lifespans.

Early in our study, it became clear that a few issues were going to drive any future work on this facility. There are at least three significant considerations that need to be contemplated when reviewing possible code-driven scope upgrades.

1. Based on the 2012 International Existing Building Code (Tennessee Fire Marshal Adopted Code). This project would be considered a Level 2 alteration. This code doesn't mandate a full upgrade to the current code but does impact design decisions. The main concerns to be addressed would be:
  - a. Revising accessibility where possible.
    - i. Possible revision allowing ADA-accessible toilet facilities throughout.
  - b. Revising all of the Fire Alarm systems.
    - i. The new system will be required to meet current codes, including horns and strobes.
  - c. Resolving all the non-protected window openings in the non-sprinklered corridors (currently filled with wire glass). All are required to be rated 1 hour.
  - d. Resolving all the non-protected door openings in the non-sprinklered corridors. All are required to be rated 1 hour.
2. Based upon a City of Chattanooga Ordinance – Sec 17-3.6.1 – if a building remodel cost is over 30% of the replacement cost, one must upgrade the building to meet current codes (ADA, Energy, and Building). This concept is important knowing that full upgrades to different systems could require more cost than desired.

Based on the remaining two known issues, we considered that the City's code was going to be most stringent and defined the "replacement cost of the facility" per Code section 101.4.7.1. (attached below).

The 2023 RS Means defines this type of space to have a cost per Square Foot (\$/SF) cost of \$226.40. This figure would make the city-approved replacement cost **\$35,754,000**. 30% of that cost is **\$10,726,000**. That sum is the financial limit placed by the City to keep this project from requiring full building code updates if expended in a single phase.

MTa believes the replacement cost of this facility is closer to \$63,000,000. We are using the numbers provided by public information noted in the City Code to evaluate the

replacement cost for this report. In the last 3 years, the replacement cost of all buildings has increased significantly due to the substantial increase in building construction costs.

Based on the occupancy of this structure (educational), and the current building code in the City of Chattanooga, MTa believes an addition of substance will require the addition of a Storm shelter (IBC 423.4 & ICC 500). When Hamilton County and the City of Chattanooga upgraded their building codes to the 2018 International Building Codes (IBC) this became the rule. Any assembly space will require the placement of a storm shelter. The IBC code (section 423.4.1 exception 1) specifically requires a storm shelter to accommodate the required occupancy for the new building.

Below is a link to the 2018 IBC section 423.4:

<https://up.codes/viewer/knoxville/ibc-2018/chapter/4/special-detailed-requirements-based-on-occupancy-and-use#423>

Below is a link to the Highlights on Storm Shelters & ICC 500:

[https://www.fema.gov/sites/default/files/documents/fema\\_ICC-500-2020-highlights\\_publication\\_082021.pdf](https://www.fema.gov/sites/default/files/documents/fema_ICC-500-2020-highlights_publication_082021.pdf)

Below is a link to the standard ICC 500:

[https://codes.iccsafe.org/content/ICC5002020P1/chapter-1-application-and-administration#ICC5002020P1\\_Ch1\\_Sec104](https://codes.iccsafe.org/content/ICC5002020P1/chapter-1-application-and-administration#ICC5002020P1_Ch1_Sec104)

**TASK II AND TASK III ARE NOT INCLUDED IN THIS REPORT.**

## **TASK IV – PROVIDE A SUMMARY OF AVAILABLE PROGRAM DOCUMENTS**

**Provide an assumed combined required program area to house both the High School and the Middle School.**

HCDE provided MTa with a preliminary building program for Tyner. This program was used by MTa as the “standard” in which the new Brainerd / Dalewood would be configured. We have access to other building programs, but the design team felt it was most appropriate to vet the new program against the newest school in the HCDE inventory of facilities that offered traditional education (in place of a Creative Arts, Vocational, or STEM program).

The Tyner program was altered based on the student population required in each division of schools (Middle vs High). The program for Tyner initially had a 90% utilization factor population of **675** students for High School and **563** students for the Middle school components. For the Brainerd / Dalewood combined program, we used the latest census to populate the required areas based on a 90% utilization factor population of **646** students for High School and **284** students for the Middle school component.

We also made several assumptions that helped define the projected area needed to fulfill the required programs. These were:

### **In the Middle School Division**

1. We reduced the number of core classrooms by 50% to satisfy the population of students.
2. We provided an equal area for the Related Arts / CTE program even though the population was significantly less. Currently, Dalewood has over 7,575 SF of non-traditional program area that we did not specifically include in this programmed area but may be included if other programs (i.e. Broadcasting, CTE STEM, Foreign language) are not required.
3. We added an area allowing an office element to be located near the middle school entry.
4. We provided additional gymnasium areas due to the desire to reuse the existing gym at Brainerd. If the decision is to build a new Middle School gym and reuse the existing High School gym for High School activities, some areas can be reduced.

### **In the High School Division**

1. We added a field house component to the High School program allowing Football storage and locker facilities to remain close to that program element. All other functions of the gymnasium would stay within the Basketball gym.
2. We reduced the size of the gymnasium capacity from 1,200 to 1,000 occupants (based on the school census).

### **Shared Use areas**

1. We removed the requirement for a small auditorium as indicated in Tyner’s program deferring to the full existing auditorium in the Brainerd/ Dalewood program.
2. We provided only the existing 2,800 SF, that is currently provided in Brainerd, instead of populating a full 4,400 SF Exceptional Education suite. Currently, Brainerd does not have a full Exceptional Ed. program.
3. We have recommended an addition of 2,000 SF to the cafeteria if lunch scheduling cannot be revised to allow for the full load of 930 students. This work will be a complex endeavor if constructed in the location shown due to the need to fly everything into this location over the existing buildings.

The summary of programs and areas is as follows:

<b>MIDDLE SCHOOL DIVISION</b>		<b>Tyner</b>	<b>Brainerd</b>	
CORE ACADEMIC:		19,600	10,885	
	90% Utilization classrooms	563	284	
		26	13	
RELATED ARTS		6,620	732	
CTE			5,870	added
GENERAL USE:		2,000	2,506	
Office area			3,500	added
MIDDLE SCHOOL GYM AREA		16,440	20,720	
		44,660	44,213	
Circulation	20%	8,932	8,843	
Total 6-8 Sq. Ft.		<b>53,592</b>	<b>53,056</b>	
<b>HIGH SCHOOL DIVISION</b>		<b>Tyner</b>	<b>Brainerd</b>	
CORE ACADEMIC:		24,850	23,066	
	90% Utilization classrooms	675	646	
		24	24	
GENERAL USE:		9,000	4,676	
			5,000	add a Field house new gym, no stage, no wrestling
HIGH SCL GYMNASIUM AREA		32,345	22,045	
Est. 9-12 Sq. Ft.		66,195	54,787	
Circulation	20%	13,239	10,957	
Total 9-12 Sq. Ft.		<b>79,434</b>	<b>65,744</b>	
<b>SHARED USE AREAS</b>		<b>Tyner</b>	<b>Brainerd</b>	
AUDITORIUM		0	12,318	
BAND/CHORAL		14,775	5,412	no small auditorium
ELECTIVES		15,800	17,425	
EXCEPTIONAL ED.		4,400	2,800	not a full program at Brainerd
CAFETERIA		12,500	7,950	
			2,000	added room
ADMINISTRATION:		8,479	3,840	
MEDIA:		6,350	5,930	
GENERAL USE:		2,600	1,720	
Est. Shared Use Sq. Ft.		64,904	64,617	
Circulation @ 20%		12,981	12,923	
Total Shared Use Sq. Ft.		<b>77,885</b>	<b>77,540</b>	
<b>AREA SUMMARY</b>				
Total Sq. Ft. Middle School (6-8) Division		53,592	53,056	
Total Sq. Ft. High School (9-12) Division		79,434	65,744	
Total Sq. Ft. Shared Areas		77,885	77,540	
Grand Total Sq. Ft.	Total Area	<b>210,911</b>	<b>196,340</b>	
			38,415	New SF required
			157,925	existing area
Students		<b>1,238</b>	<b>930</b>	
SF / Student		170.36	211.12	

As noted previously, each of the existing schools has several programs that are not specifically noted in the Tyner program. We have not attempted to provide an area for all these programs to exist in the new joint school program. We have provided an area commensurate with that in Tyner's middle school-related arts and high school elective programs. Where existing construction didn't conflict with the arrangement of core classrooms – additional area was allowed to remain. These areas are tabulated as follows:

- Tyner's program allows for 6,620 SF-related arts for the middle school and 15,800 for the high school elective area.
- In comparison, the Joint program allows for 6,602 SF-related arts for the middle school and 17,425 for the high school elective area.

A list of these areas is provided below:

**Brainerd High**

<b>Program</b>	<b>Current Sq Ft</b>
Family Resource Center	2,035
Cosmetology Lab	3,580
Speech	1,480
Avionics Classroom	1,740
Avionics Lab	4,000
Culinary Arts	2,760
Driver Training	975
Typing (2 classrooms)	2,381
Bookkeeping	975
Business Machines	1,175
Short Hand	975
Home Making	1,475
General Shop	2,380
<b>Total Program Sq. Ft.</b>	<b>25,931</b>

**Dalewood Middle**

<b>Program</b>	<b>Current Sq Ft</b>
Family Life Center	1,200
On Point	
Family Partnership	
Ben Carlson's "Think Big" school	760
Career Cluster (Media Center)	1,130
Computer Science	
Audio Visual	
Digital Fabrication	
Castle Store & Gameroom	835
Audio Video Innovation Center	2,250
Fitness Center	600
Yoga and Dance Studio	500
Bike Program	300
<b>Total Program Sq. Ft.</b>	<b>7,575</b>
	<b>33,506</b>

**Define a list of shortcomings of existing areas that will need to be resolved by future building additions.**

Based on this Summary, we recommend adding the following area to the existing Brainerd High School campus to cover the additional programs required by the addition of a middle school.

- 3,500 SF Middle school office addition
- 5,870 SF Middle School classroom addition
- 22,045 High School gymnasium addition
- 2,000 Middle School Cafeteria Addition
- 5,000 Field House addition

**38,415 SF new construction**

Not knowing the ultimate scope of the project, MTa considered possibilities towards scope to determine how they would fair against the City’s limiting cost of \$10,726,000 (30% of Replacement Cost).

We have not established a specific list of areas to renovate but we understand providing minimal revised finishes and lighting upgrades would improve this school’s aesthetic image. With the overall existing area containing 157,925 SF, improvements would need to be prioritized be less than \$88/ SF or less to stay under the 30% replacement cost prescribed in the City Code if accomplished in a single phase.

As the design architect considers the exact scope of the renovation, specific work around the ceilings in the original school needs to be defined closely. Abatement of asbestos contained within the ceiling plane will be a costly endeavor but may prove to be necessary to achieve the required aesthetic result. We caution against wholesale remodeling of the ceilings knowing that this abatement scope would inflate the cost of a relatively simple remodel causing the contract to exceed 30% of the Replacement Cost.

Although not specifically requested in our scope of work, an initial programmatic budget for this project would be:

<u>Area</u>	<u>Cost / SF</u>	<u>Subcost</u>		
23000	\$550	\$12,650,000	New gym	
3500	\$450	\$1,575,000	New office	← Moved to Renovation budget
5800	\$450	\$2,610,000	New fieldhouse	
5870	\$700	\$4,109,000	New classroom addition	
2000	\$500	\$1,000,000	New cafeteria addition	← No cafeteria needed; moved funds to renovation budget
		\$21,944,000	New Construction	
196,340	\$51	\$10,000,000	Existing interior renovations	← This was too low, we added to this based on Tyner comparison.
		\$31,944,000	<b>Total project construction cost</b>	
		unknown	fixtures, furniture, & equipment	
		\$1,700,000	Project design fees	

In this budget, the classroom addition would be constructed in a manner to provide the code requirements of a storm shelter.

Softball field not mentioned here, moved on Page 4

## **TASK V – PROVIDE A SCHEMATIC TEST FIT**

In the attached test fits located in the Appendix, MTa shows how a “High School” and a “Middle School” curriculum may coexist on this site based on the previous commentary. Please note that these are only two of several possible scenarios. These indicate the general size of area needed to fulfill the combination of the two schools. This area can be rearranged to meet several differing requirements that may be more of a priority for the County and School System. In our study the following comments were heard by both schools:

- Each school wanted to maintain programmatic division between the others school.
- Each school considered a different “start of school” timing and separate transportation being advantageous.
- Each school wanted to keep as many active programs as possible when combined.

MTa intentionally grouped the construction in a centralized area in “Scheme A” to minimize the impacts of construction on an operational school. We feel this consolidation would be beneficial, lowering construction costs and providing a safer environment for construction, by limiting contractor/student access.

With this configuration, the school would receive a new main façade to the public way. This grouping of the main elements would also help minimize the travel distances faced by each student and help control the differing age groups more effectively. We would hope that the main gymnasium would act as the bridge between the two separate schools garnering a new sense of community for this newly combined school.

## **APPENDIX**

All attachments are found at this link ([Brainerd Dalewood report](#))

### **Supporting documents**

1. City of Chattanooga Code of Ordinances – Section 101.4.7.
2. 2018 IBC – section 423.4 Storm Shelters
3. FEMA ICC 500 highlights
4. Brainerd / Dalewood Schematic Test Fit
5. Tyner Preliminary Program
6. Brainerd / Dalewood Preliminary Program

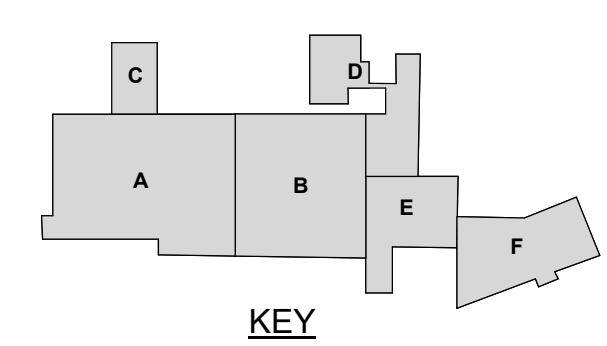
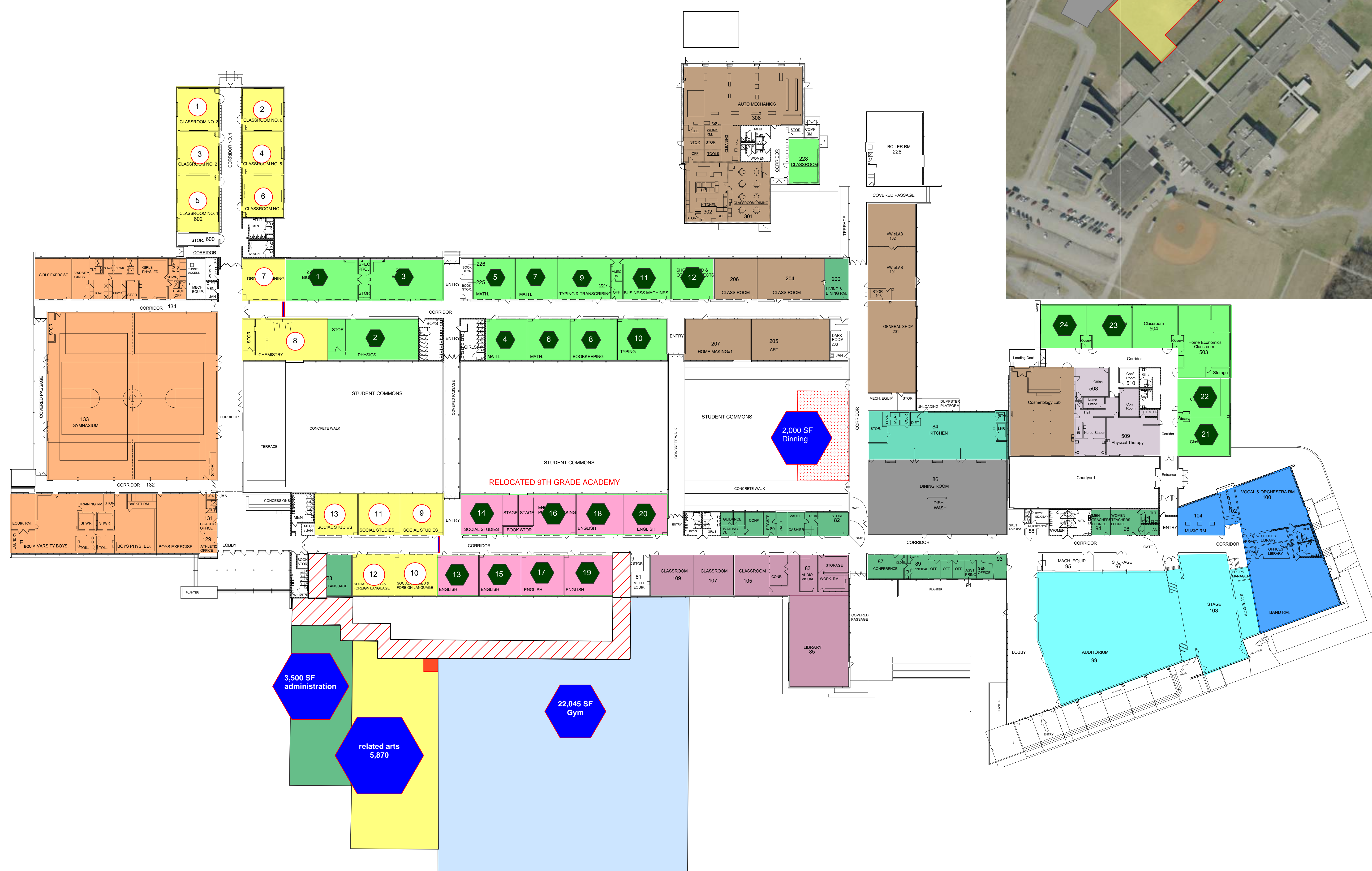
### **Plans and construction documents**

1. Brainerd
  - Partial Plans by Selmon T. Franklin (3/20/1959)
  - Partial Plans by Yearwood and Johnson (9/14/1979)
  - Partial Plans by DHW (3/22/1991)
  - Plans by DHW (11/22/1993)
  - Brainerd Overall Plan
  - ACAD floor plan
2. Dalewood
  - Partial Plans by Butler Wilhoite Hildebrand (6/10/1962)
  - Partial Auditorium Plans by Butler Wilhoite Hildebrand (3/20/1964)
  - Partial Addition Plans by Billingsley Architecture (3/19/2004)
  - Dalewood Overall Plan

Autodesk Docs/Brainerd 24-10 Brainerd High R2023.rvt

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5,000 SF field house



Schematic Design

Revisions:		
No.	Issue	Date

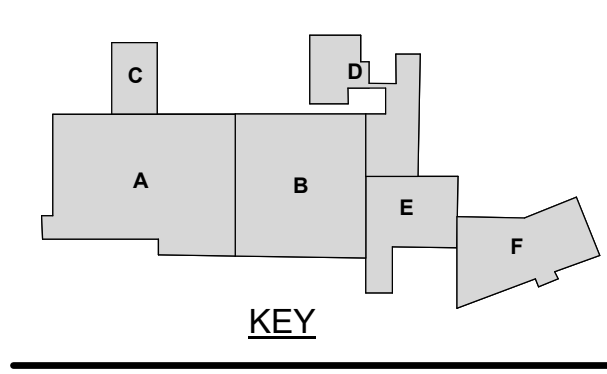
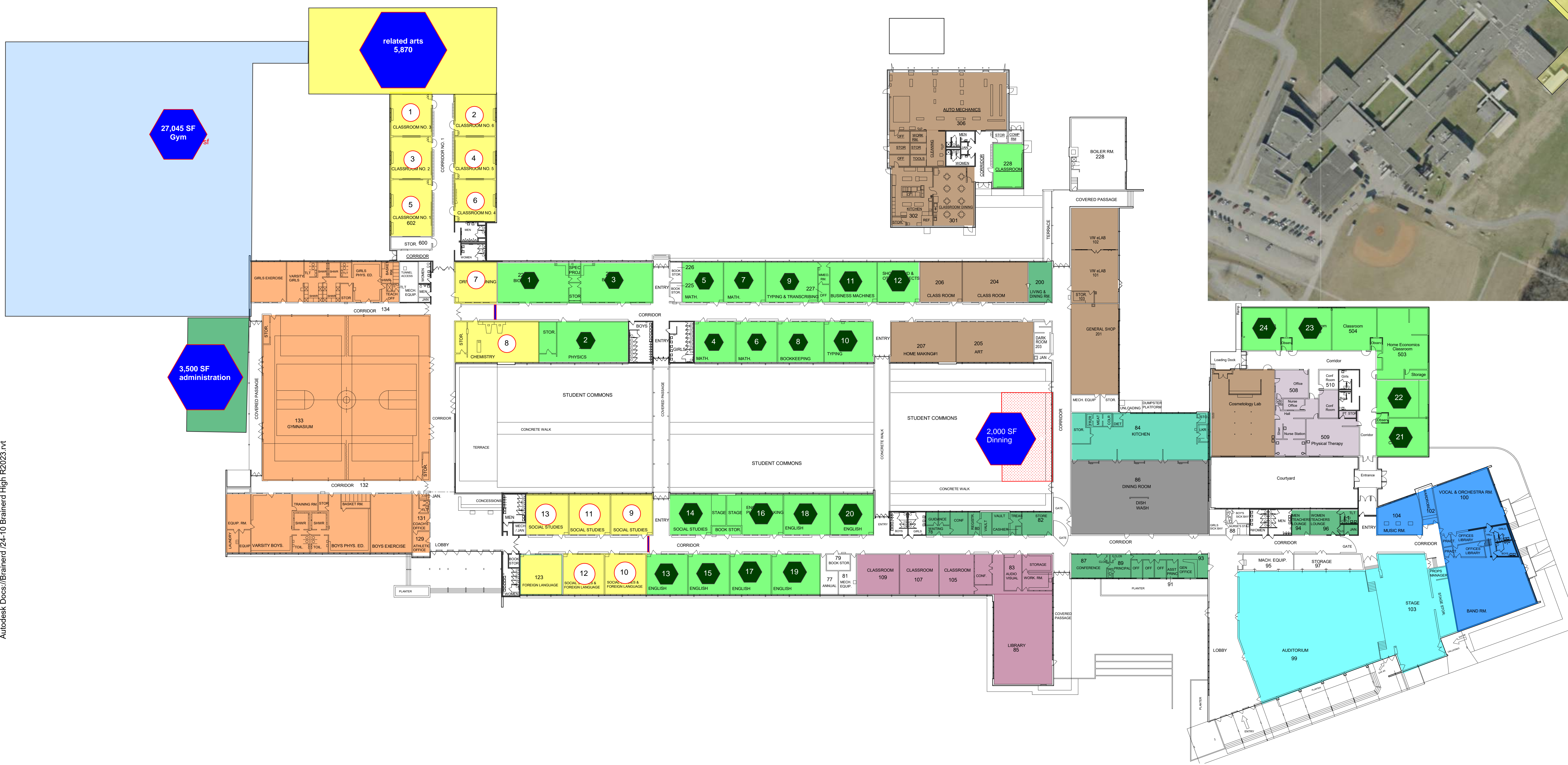
Issue Date: April 29, 2024  
 Project No.: 24-10

Sheet Title:  
**ARCHITECTURAL**  
**SCHEME A**

Sheet Number:  
**A101**

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Schematic Design

Revisions:		
No.	Issue	Date

Issue Date: April 29, 2024  
 Project No.: 24-10

Sheet Title:  
**ARCHITECTURAL**  
**SCHEME B**

Sheet Number:  
**A102**

## EXHIBIT B: Project Budget and Fee Schedule

A/E Fee		Comments
Estimated Construction Cost	\$ 31,650,000.00	\$13,175,000 Renovation (158,000 S.F.) / \$18,475,000 New Construction (34,000 S.F.)
Architect Fee	\$ 2,022,712.00	Per state fee schedule based on the Estimated Construction cost. The contract will be a lump sum fee. \$965,544.94 Renovation Fee / \$1,057,166.80 New Construction Fee
Mechanical		Included in fee
Electrical		Included in fee
Plumbing		Included in fee
Fire Protection		Included in fee
Civil		Included in fee
Structural		Included in fee
Landscaping		Included in fee
Food Service Consultant		Included in fee
Code Consultant (ADA/Accessibility)		Included in fee
Total	\$ 2,022,712.00	

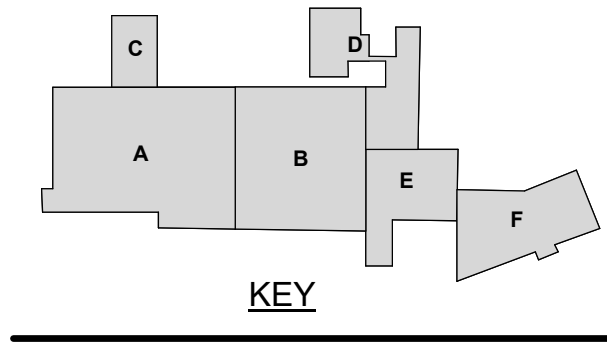
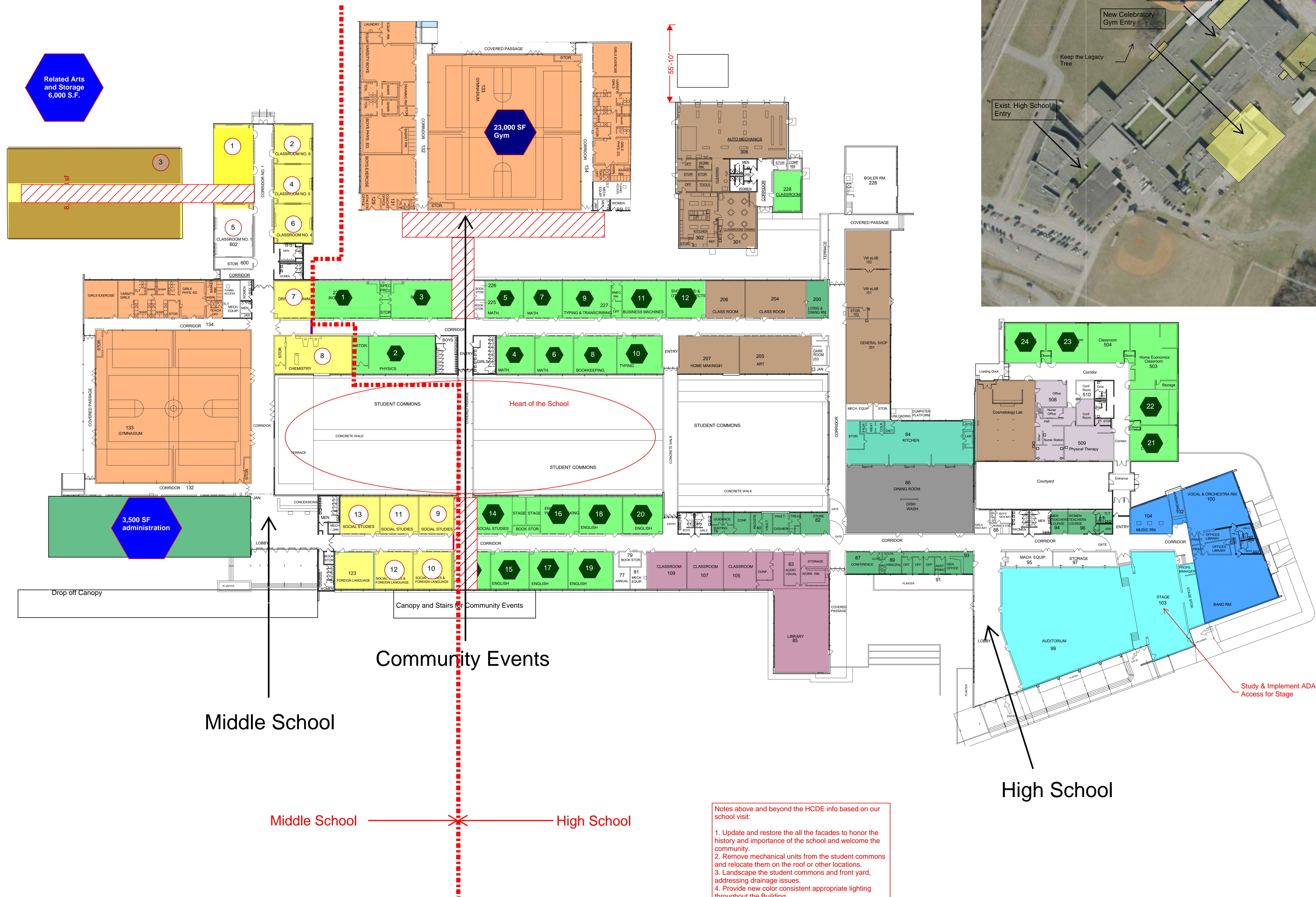
Reimbursable Expenses		Comments
Geothermal Testing	NA	N/A
Printing	\$ 1,500.00	10% Allowable Markup
Traffic Study	\$ 63,800.00	10% Allowable Markup
Roof Consultant	NA	NA
Storm Water Permits	\$ 3,300.00	
SOV Infeasibility Application	\$ 1,500.00	10% Allowable Markup
City of Chattanooga Plans Review	\$ -	Larger Permit to be direct paid to City. Do not include in Contract
State Fire Marshall Review Fee	\$ -	Larger Permit to be direct paid to State. Do not include in Contract
Miscellaneous Permits	\$ 5,000.00	10% Allowable Markup
Survey	\$ 82,500.00	10% Allowable Markup
Geotechnical/Testing	\$ 27,420.00	20% Allowable Markup
Special Testing and Inspections	\$ 37,150.00	Proposals solicited by Architect contracted by Owner
Wetland Delineation	\$ 9,000.00	10% Allowable Markup
Tree Survey	\$ 22,000.00	10% Allowable Markup
Total	\$ 253,170.00	

Additional Services		Comments
A.S. Allowance	\$ 125,000.00	General Allowance
A.S. Allowance Programming	\$ 75,000.00	
A.S. Allowance Prog - Cost Estimate	\$ 26,000.00	
Design Contingency	\$ 200,000.00	10% of Design Fee
Total	\$ 426,000.00	

Total Contract \$ 2,701,882.00

**Note: Make necessary revisions to the worksheet as needed for project specific items. All changes will be reviewed and agreed upon by the owner and architect. All mark ups are included in the contract price.**

The estimated construction cost will be defined as the total project cost including the building, site, designated allowances and general allowances.



Schematic Design

Revisions:		
No.	Issue	Date

Notes above and beyond the HCDE info based on our school visit:

1. Update and restore the all the facades to honor the history and importance of the school and welcome the community.
2. Remove mechanical units from the student commons and relocate them on the roof or other locations.
3. Landscape the student commons and front yard, addressing drainage issues.
4. Provide new color consistent appropriate lighting throughout the Building.



Conceptual Layout for the Combined Brainerd High School and Middle School June 20th, 2025

Issue Date: April 29, 2024  
 Project No.: 24-10  
 Sheet Title: ARCHITECTURAL

SCHEME B

Sheet Number: A102

Autodesk Docs/Brainerd 24-10 Brainerd High R2023.rvt

PLOTTED: 6/20/2024 10:08:33 AM FROM:

**To:** Hamilton County Board of Education  
Dr. Justin Robertson, Superintendent

**From:** Shannon Moody, Chief Strategy Officer

**Date:** October 9, 2025

**Subject:** RFP Review Committee

**Board Agenda Category:**

- Consent Agenda
- Action Item
- Reports and Information

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In accordance with Hamilton County Schools (HCS) procurement guidelines, HCS has identified a review committee responsible for reviewing and scoring all mental health services RFP submissions.

We respectfully request approval of the following committee to bring all reviewed, qualified submissions as recommendations to the Board for approval on November 20, 2025:

- Lori Carmack; Coordinator of Social Workers
- Dr. Jasmine Fernández; Chief of Student Supports
- Dr. Blake Freeman; Chief Academic Officer
- Sara Garmon; Coordinator of Compliance and Compensation
- Dr. Shane Harwood; Rock Point Learning Community Superintendent
- Shannon Moody; Chief Strategy Officer
- Dr. Patricia Russell; Executive Director of Social Emotional Academic Development

**Opportunity 2030 Commitment Connection**

- Every Student Learns
- Every Student Belongs
- Every School Equipped
- Every Employee Valued
- Every Community Served

**To:** Hamilton County Board of Education  
Dr. Justin Robertson, Superintendent

**From:** Mary Ellen Heuton, Chief Financial Officer  
Lindsay Cepero, Director of Procurement

**Date:** October 02, 2025

**Subject:** August 2025 Legal Services Summary

**Board Agenda Category:**

- Consent Agenda
  - Action Item
  - Reports and Information
- 

The following reflects the legal fees paid for services received during the month of August 2025:

Bennett & DeCamp, PLLC (Retainer)	\$20,000.00	<b>TOTAL</b>	<b>\$20,000.00</b>
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**Opportunity 2030 Commitment Connection**

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