

AGENDA
ROCKY POINT PUBLIC SCHOOLS
BOARD OF EDUCATION MEETING
May 21, 2024

Reminder Regarding Public Comment:

- Speakers must present their license to Mrs. Crossan as they approach the podium to allow for their address to be recorded. Speakers will announce their name once at the podium.
- Public comment at meetings of the Board shall be restricted to civil discourse, free from disparaging remarks or inferences toward any person or organization. Speakers who fail to observe this protocol will be ruled out of order.
- A period of time not to exceed fifteen (15) minutes, unless extended at any given meeting by resolution of the Board, shall be provided prior to Board action on the agenda. Each speaker shall be limited to a maximum of three minutes. Speakers may not share, defer, or otherwise reallocate any or all of the three minutes afforded them.
- A period of time not to exceed thirty (30) minutes, unless extended at any given meeting by resolution of the Board, shall be provided subsequent to the completion of Board action on the agenda. Each speaker shall be limited to a maximum of three minutes. Speakers may not share, defer, or otherwise reallocate any or all of the three minutes afforded them.
- Speakers shall be ruled out of order if they attempt to speak about any specific student or employee, by name or title.

I Meeting called to Order:

Present: Jessica Ward, President
Michael Lisa, Vice President
Edward Casswell, Trustee
Susan Sullivan, Trustee
Erin Walsh, Trustee
Scott O'Brien, Ed.D., Superintendent of Schools
Susann Crossan, Assistant Superintendent
Christopher Van Cott, Assistant Superintendent for Business
Aaron Factor Ed.D., Assistant Superintendent for Curriculum and Instruction
Kelly White, District Clerk
Loretta Sanchez, Assistant District Clerk

Absent:

II Executive Session

At _____ p.m. motion made and seconded to adjourn to Executive Session to discuss _____.

Motion _____^{2nd} _____ Vote _____

The Board returned to Open Session at ___p.m.

Pledge of Allegiance

Superintendent's Report

Frank J. Carasiti Elementary School

Joseph A. Edgar Elementary School

Rocky Point Middle School

Rocky Point High School

Music Department

Athletics Department

CONSENT AGENDA

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

III-IX Consent Agenda Items

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

- III: Minutes** – Regular Meeting April 16, 2024; Regular Meeting April 18, 2024
- IV Budget Transfer Summary** – April 2024
- V: Treasurer's Reports** – March 2024
- VI: Extra-Classroom Activity Account Treasurer's Report** – March 2024
- VII: Financial Reports** – March 2024
- VIII: Internal Claims Audit Report** – May 2024
- IX: Committees on Special Education Schedules 5-21-24-A and 5-21-24-B**, as recommended by the Superintendent of Schools, to arrange for appropriate services, as indicated.

Motion _____ 2nd _____ Vote _____

X Sound Beach Music Scholarship Donation

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approves and accepts the donation from Sound Beach Music Inc., in the amount of \$500, to be deposited to the Scholarship Account CM2016.001.

Motion_____2nd_____Vote_____

XI Rita E. Sullivan Scholarship Donation

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approves and accepts the \$1,000.00 scholarship donation from Susan and Roger Sullivan, to be deposited to the Scholarship Fund CM2000.000.

Motion_____2nd_____Vote_____

XII Friends of Music Donation to Purchase New Electronic Equipment

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approves and accepts the donation from The Friends of Music for the purchase of new electronic equipment for the Middle School Instrumental Music Room (Room 120) and the Joseph A. Edgar music sound system.

BE IT RESOLVED, that the Rocky Point Union Free School District hereby approves, upon the recommendation of the Superintendent of Schools, to increase the general fund budget by \$5,113.80 as a result of the donation from The Friends of Music.

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

A 2138 500 03 3120 \$3,676.76 (MS Room 120/HS)

A 2138 500 03 3120 \$1,437.04 (JAE)

Motion_____2nd_____Vote_____

XIII Munistat Services Scholarship Donation

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approve and accept the \$250.00 scholarship donation from Munistat Services, Inc., to be deposited to the Scholarship Fund CM2009001.

Motion_____2nd_____Vote_____

XIV Citizens Campaign Fund for the Environment Grant Award

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

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

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

A2110500033160 \$1,250.00

A2110406030000 \$1,250.00

Motion_____2nd_____Vote_____

XV Donation from Ohiopyle Prints, Inc.

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

BE IT RESOLVED, that the Rocky Point Union Free School District hereby approves, upon the recommendation of the Superintendent of Schools, to increase the general fund budget by \$33.66 as a result of the donation from Ohiopyle Prints, Inc.

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

A 2110 500 03 0000 \$33.66

Motion_____2nd_____Vote_____

XVI Surplus Equipment

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approves for surplus the following attached lists of equipment.

Motion_____2nd_____Vote_____

XVII 2023-2024 Reserve Fund Transfers-Out

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approves the transfer of funds in the amount of \$715,000 from the District’s restricted reserve funds as reflected in the District’s 2023-2024 Adopted Budget.

Motion_____2nd_____Vote_____

XVIII Bid #22-02 – Repair and Maintenance of District Vehicles Contract Extension for 2024-2025

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education renews the agreement with CD Automotive Enterprises, Inc. for Repair and Maintenance of District Vehicle Services for the 2024-2025 fiscal year at no additional cost as per the attached.

Motion_____2nd_____Vote_____

XIX RFP #R22-02 Consultant Services-State Aid/STAC Claims Processing Contract Extension for 2024-2025

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education renew the agreement with Edgewater Consulting, LLC for Consultant Services-State Aid/ST AC Claims Processing for the 2024-2025 school year, at the rate specified on the attached.

Motion_____2nd_____Vote_____

XX RFP #R22-03 Independent External Auditing Services Contract Extension for Year End June 30, 2025

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education renews the agreement with R.S. Abrams & Co., LLP for Independent External Auditing Services for the year ending June 30, 2025, at the rate specified on the attached.

Motion_____2nd_____Vote_____

XXI Bid #23-01 Lexmark OEM Toner & Supplies Contract Extension for 2024-2025 – The Office Pal

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education renews the agreement with The Office Pal for Lexmark OEM Toner & Supplies for the 2024-2025 fiscal year at no additional cost, as per the attached.

Motion_____2nd_____Vote_____

XXII Bid #23-01 Lexmark OEM Toner & Supplies Contract Extension for 2024-2025 – PC University

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education renews the agreement with PC University Distributors as secondary vendor for Lexmark OEM Toner & Supplies for the 2024-2025 fiscal year at no additional cost, as per the attached.

Motion_____2nd_____Vote_____

XXIII RFP #R23-02 Internal Claims Auditor Services Contract Extension for 2024-2025 School Year

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education renews the agreement with John F. Dennehy, Jr. CPA, P.C. for Internal Claims Audit Services for the 2024-2025 school year, at the rate specified on the attached.

Motion_____2nd_____Vote_____

XXIV Bid #23-04 Plumbing Services Contract Extension for 2024-25

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education renews the agreement with Maccarone Plumbing Inc. for Plumbing Services for the 2024-2025 fiscal year at no additional cost, as per the attached.

Motion_____2nd_____Vote_____

XXV Bid #23-06 Integrated Pest Management Services Contract Extension for 2024-2025

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education renews the agreement with Rest Easy Pest Control, LLC / Bug Fighters Etc., Inc. for Integrated Pest Management Services for the 2024-2025 fiscal year at no additional cost, as per the attached.

Motion_____2nd_____Vote_____

XXVI Bid #23-07 Asphalt/Concrete Paving & Repair Contract Extension for 2024-2025

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education renews the agreement with Park Line Asphalt Maintenance, Inc. for Asphalt/Concrete Paving & Repair for the 2024-2025 fiscal year at no additional cost, as per the attached.

Motion_____2nd_____Vote_____

XXVII Bid #23-08 Cesspool/Septic Tank/Waste Line Sewer-Jet Contract Extension for 2024-2025

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education renews the agreement with Park Line Asphalt Maintenance, Inc. for Cesspool/Septic Tank/Waste Line Sewer-Jet Services for the 2024-2025 fiscal year at no additional cost, as per the attached.

Motion_____2nd_____Vote_____

XXVIII Bid #23-09 District Wide Printing Contract Extension for 2024-25

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education renews the agreement with Sav-On Printing for District Wide Printing Services for the 2024-2025 fiscal year at no additional cost, as per the attached.

Motion_____2nd_____Vote_____

XXIX Bid #24-02 Analog Phone System Maintenance Contract Extension for 2024-25

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education renews the agreement with TMT – Excel Communications for Analog Phone System Maintenance for the 2024-2025 fiscal year at no additional cost, as per the attached.

Motion_____2nd_____Vote_____

XXX RFP #R24-02 Medicaid Consultant Services Contract Extension for 2024-2025

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education renew the agreement with Zyron Industries LLC for Medicaid Consultant Services for the 2024-2025 school year, as per the attached.

Motion_____2nd_____Vote_____

XXXI RFP #R24-04 NYS Certified Athletic Trainer Services Contract Extension for 2024-25 School Year

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education renews the agreement with St. Charles Hospital for NYS Certified Athletic Trainer Services for the 2024-2025 school year, at the rate specified on the attached.

Motion_____2nd_____Vote_____

XXXII RFP #R24-05 Financial Accounting & Reporting Services Contract Extension for 2024-25 School Year

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education renews the agreement with R.S. Abrams & Co., LLP for Financial Accounting and Reporting Services for the fiscal year ending June 30, 2025, at the rate specified on the attached.

Motion_____2nd_____Vote_____

XXXIII Bid Award #25-01 – Electrical Services

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education awards Bid #25-01 Electrical Services to New York Trenchless, Inc., the overall lowest responsible bidder meeting bid specifications, as per the attached.

Motion_____2nd_____Vote_____

XXXIV Bid Award #25-02 – Signage Manufacture & Installation

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education awards Bid #25-02 Signage Manufacture & Installation to Alley Cat Signs Design Co., the overall lowest responsible bidder meeting bid specifications, as per the attached.

Motion_____2nd_____Vote_____

XXXV RFP #R25-03 Award – Physician Services

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approves and appoints John Gil, MD, Rocky Point Medical Care, PC for Physician Services in accordance with the scope of services submitted in response to the District's requests for proposal #R25-03 for the 2024-2025 school year.

Motion_____2nd_____Vote_____

XXXVI RFP #R25-06 Award- Affordable Care Act (ACA) Consultant Services

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, that the Board of Education approves and appoints Seneca Consulting Group, Inc. for Affordable Care Act (ACA) Consultant services in accordance with the scope of services submitted in response to the District's Requests for Proposal for the 2024-2025 school year.

Motion_____2nd_____Vote_____

XXXVII RFP Award – Workers’ Compensation Third Party Administrator (TPA) Services

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approves and appoints PMA Management Corp. for Workers’ Compensation Third Party Administrator (TPA) services in accordance with the scope of services submitted in response to the District’s Requests for Proposal for the 2024-2025 school year.

Motion_____2nd_____Vote_____

XXXVIII Sale of Five (5) Lexmark Printers (Auctions Int'l)

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approves the sale of the following equipment to the highest bidder, through Auctions International, Inc.: Lot of five (5) Lexmark MS810 Printers, \$120.00.

Motion_____2nd_____Vote_____

XXXIX Internal Audit Report and Corrective Action Plan - December 2023

RESOLVED, that upon the recommendation of the Superintendent of Schools, that the Board of Education accepts the following audit report as completed by the Internal Auditing firm, Nawrocki Smith, LLC.

- *Annual Risk Assessment Update Pertaining to the Internal Controls of District Operations - December 2023*

BE IT FURTHER RESOLVED, that upon the recommendation of the Superintendent of Schools, that the Board of Education accepts the attached Corrective Action Plans as prepared by the Business Office in response to the audit reports listed above. As required under Section 170.12 of the Regulations of the Commissioner of Education, said audit reports and related Corrective Action Plans will be submitted to the New York State Education Department, Office of Audit Services

Motion_____2nd_____Vote_____

XL 2023-2024 Health Service Contract – Three Village Central School District, South Huntington UFSD, Hauppauge Public Schools

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education authorizes the President of the Board of Education to enter into an agreement for health services for the 2023-2024 school year with the following districts:

- Three Village Central School District
- South Huntington Union Free School District
- Hauppauge Public Schools

Motion_____2nd_____Vote_____

XLI E-Rate Purchase Agreement / CDWG

WHEREAS, the Rocky Point UFSD applied for, and was granted, partial federal funding through the E-Rate program to purchase three APC Uninterruptible Power Supply units from CDW Government, LLC. (CDWG) in 2024-25 at a net cost of \$2,858.78 (\$4,288.18 paid by E-Rate).

BE IT RESOLVED, the President of the Board of Education is hereby authorized, on behalf of the District, to execute an E-Rate Purchase Agreement with CDWG.

Motion _____ 2nd _____ Vote _____

XLII Municipal Advisor Services Agreement – Munistat

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education authorizes the President of the Board of Education to execute the Municipal Advisor Services Agreement with Munistat for fiscal agent services during the 2024-2025 school year.

Motion _____ 2nd _____ Vote _____

XLIII Memorandum of Agreement between the Board of Education and the Rocky Point Teachers' Association

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools the Board of Education authorizes the President of the Board of Education to execute a Memorandum of Agreement between the District and the Rocky Point Teachers' Association for the purpose of eliminating three clubs from Schedule B of the Collective Bargaining Agreement and adding seven (7) clubs/stipend positions that shall become part of Schedule B of the Collective Bargaining Agreement between the Rocky Point Union Free School District and the Rocky Point Teachers' Association effective July 1, 2024 as per the attached.

Motion _____ 2nd _____ Vote _____

XLIV Agreement between the Rocky Point Union Free School District Board of Education and the Rocky Point Administrators' Association

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools the Board of Education authorizes the President of the Board of Education to execute an Agreement between the District and the Rocky Point Administrators' Association for the purpose of providing compensation to administrators who attend overnight field trips during the 2023-2024 and 2024-2025 school years.

Motion _____ 2nd _____ Vote _____

XLV Personnel

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

Motion _____ 2nd _____ Vote _____

XLVI Recess

I move that the Board of Education recess this meeting at _____ PM in order to accept the results of the budget vote and the election of two (2) Board of Education trustees.

Motion _____ 2nd _____ Vote _____

Meeting reconvened at _____ PM.

XLVII Resolution to Accept the Results of the Budget Vote/Capital Reserve Fund Vote /RP Historical Society Hallock Homestead Museum Vote/ Election of Trustees

BE IT RESOLVED, that the Board of Education accepts the results of the Budget Vote, Capital Reserve Fund Vote, Rocky Point Historical Society Hallock Homestead Museum Vote and Election of Trustees.

Motion _____ 2nd _____ Vote _____

XLVIII Adjournment

I move that the Board of Education adjourns the meeting at _____ PM

Motion _____ 2nd _____ Vote _____

MINUTES
ROCKY POINT PUBLIC SCHOOLS
BOARD OF EDUCATION MEETING
April 16, 2024

Ms. Ward called the meeting to order at 5:56 p.m. in the auditorium of Rocky Point High School.

Present: Jessica Ward, President
Michael Lisa, Vice President (arriving at 5:57 p.m.)
Edward Casswell, Trustee
Susan Sullivan, Trustee
Scott O'Brien, Ed.D., Superintendent of Schools
Susann Crossan, Assistant Superintendent
Christopher Van Cott, Assistant Superintendent for Business
Aaron Factor Ed.D., Assistant Superintendent for Curriculum and Instruction
Kelly White, District Clerk

Absent: Erin Walsh, Trustee

EXECUTIVE SESSION

At 5:56 p.m. a motion was made by Susan Sullivan, and seconded by Ed Casswell, to adjourn to Executive Session to discuss confidential legal and personnel matters.

All in favor – Motion carried 4-0

The Board returned to Open Session at 7:06 p.m.

PLEDGE OF ALLEGIANCE

Ms. Ward reminded the meeting attendees of the public comment procedures.

SUPERINTENDENT'S REPORT

Dr. O'Brien invited Mr. Van Cott to the podium for the final budget presentation.

Ms. Ward opened the floor to questions/comments regarding the agenda.

There were no questions/comments.

CONSENT AGENDA

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

III-IX CONSENT AGENDA ITEMS

Upon a motion made by Michael Lisa, and seconded by Susan Sullivan, the following resolution was offered:

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

- III: Minutes** – Regular Meeting March 18, 2024
- IV: Budget Transfer Summary** – March 2024
- V: Treasurer’s Reports** – February 2024
- VI: Extra-Classroom Activity Account Treasurer’s Report** – February 2024
- VII: Financials** – February 2024
- VIII: Internal Claims Audit Report** – March 2024
- IX: Committees on Special Education Schedules 4-16-24-A and 4-16-24-B** as recommended by the Superintendent of Schools, to arrange for appropriate services, as indicated.

All in favor – Motion carried 4-0

X INTERDISTRICT COUNCIL OF SUPERINTENDENTS – SCHOLARSHIP DONATION

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

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approve and accept the \$250 donation from the Interdistrict Council of Superintendents, to be deposited to the Scholarship Fund-CM-2020

All in favor – Motion carried 4-0

Ms. Ward thanked the Interdistrict Council of Superintendents for their donation.

XI LIVCC PARENT CLUB DONATION TOWARDS CHEER NATIONAL CHAMPIONSHIP RINGS

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

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education accepts the \$379.05 donation from the LIV CC Parent Club Inc. to be used toward the purchase of the Cheer Team's National Championship Rings, as per the attached.

BE IT RESOLVED, that the Rocky Point Union Free School District hereby approves upon the recommendation of the Superintendent of Schools, to increase the general fund budget by \$379.05 as a result of the donation from the LIVCC Parent Club.

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

A2855530040000 \$379.05

All in favor – Motion carried 4-0

Ms. Ward thanked the Booster Club for their generous donation.

XII SURPLUS TEXTBOOKS

Upon a motion made by Michael Lisa, and seconded by Susan Sullivan, the following resolution was offered:

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

All in favor – Motion carried 4-0

XIII RESOLUTION TO ADOPT THE 2024-25 SCHOOL DISTRICT BUDGET

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

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education adopts the Rocky Point Union Free School District Budget for the 2024-2025 fiscal year pursuant to the Education Law Section 1716 in the amount of \$96,851,654.

All in favor – Motion carried 4-0

XIV RESOLUTION TO ADOPT THE 2024-25 PROPERTY TAX REPORT CARD

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

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education adopts the 2024-2025 Rocky Point Union Free School District Property Tax Report Card, as attached.

All in favor – Motion carried 4-0

XV

TAN BORROWING FOR THE 2024-25 FISCAL YEAR

Upon a motion made by Michael Lisa, and seconded by Susan Sullivan, the following resolution was offered:

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approve the following resolution:

TAX ANTICIPATION NOTE RESOLUTION OF ROCKY POINT UNION FREE SCHOOL DISTRICT, NEW YORK, ADOPTED APRIL 16, 2024, AUTHORIZING THE ISSUANCE OF NOT TO EXCEED \$5,000,000 TAX ANTICIPATION NOTES IN ANTICIPATION OF THE RECEIPT OF TAXES TO BE LEVIED FOR THE FISCAL YEAR ENDING JUNE 30, 2025

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

Section 1. Tax Anticipation Notes (herein called "Notes") of Rocky Point Union Free School District, in the County of Suffolk, New York (herein called "District"), in the principal amount of not to exceed \$5,000,000, and any notes in renewal thereof, are hereby authorized to be issued pursuant to the provisions of Sections 24.00 and 39.00 of the Local Finance Law, constituting Chapter 33-a of the Consolidated Laws of the State of New York (herein called "Law").

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

- (a) The Notes shall be issued in anticipation of the collection of real estate taxes to be levied for school purposes for the fiscal year commencing July 1, 2024 and ending June 30, 2025, and the proceeds of the Notes shall be used only for the purposes for which said taxes are levied.
- (b) The Notes shall mature within the period of one year from the date of their issuance.
- (c) The Notes are not issued in renewal of other notes.
- (d) The total amount of such taxes remains uncollected at the date of adoption of this resolution.

Section 3. The Notes hereby authorized shall contain the recital of validity prescribed by Section 52.00 of the Law and shall be general obligations of the District, and the faith and credit of the District are hereby pledged to the punctual payment of the principal of and interest on the Notes and unless the Notes are otherwise paid or payment provided for, an amount sufficient for such payment shall be inserted in the budget of the District and a tax sufficient to provide for the payment thereof shall be levied and collected.

Section 4. Subject to the provisions of this resolution and the Law, and pursuant to Sections 50.00, 56.00, 60.00 and 61.00 of the Law, the power to sell and issue the Notes authorized pursuant hereto, or any renewals thereof, and to determine the terms, form and contents, including the manner of execution, of such Notes, and to execute tax certifications relative thereto, is hereby delegated to the President of the Board of Education, the chief fiscal officer of the District.

Section 5. The Notes shall be executed in the name of the District by the manual signature of the President of the Board of Education, the Vice President of the Board of Education, the District Treasurer, the District Clerk, or such other officer of the District as shall be designated by the chief fiscal officer of the District, and shall have the corporate seal of the District impressed or imprinted thereon which corporate seal may be attested by the manual signature of the District Clerk.

Section 6. This resolution shall take effect immediately.

All in favor – Motion carried 4-0

**XVI 2022-23 INSTRUCTIONAL AGREEMENT - HALF HOLLOW HILLS
CENTRAL SCHOOL DISTRICT**

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

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education authorizes the President of the Board of Education to enter into a contract with Half Hollow Hills Central School District – The Hills Academy, for special education instructional services for the 2022-2023 school year, as required under applicable Individual Educational Programs, applicable law, and/or District Policy.

All in favor – Motion carried 4-0

Ms. Ward confirmed that the contract year listed is correct as we have just received the invoice.

XVII STUDENT INSTRUCTIONAL SERVICES CONTRACT

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

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approves and authorizes the Board of Education President to execute the Agreement between Rocky Point Schools and Mr. and Mrs. Kyle Jackson for their daughter, Aubree Jackson, grade 1, to attend Frank J. Carasiti Elementary School for the 2023-2024 school year. Tuition on a non-precedential basis will be waived for the 2023-2024 School Year.

All in favor – Motion carried 4-0

XVIII BOCES MULTI-YEAR SERVICE AGREEMENT (E-RATE AWARD: WAN/INTERNET SERVICES)

Upon a motion made by Michael Lisa, and seconded by Susan Sullivan, the following resolution was offered:

WHEREAS, the District (District) and the Board of Cooperative Educational Services, First Supervisory District of Suffolk County (BOCES), desire, pursuant to § 109-b and § 119-o of the General Municipal Law, and Section 1950(4)(aa) of the Education Law, to undertake a Technology Project consisting of the acquisition and installation of Internet Access, and other services as indicated in said Technology Project, and

WHEREAS, the cost of the Project #RP-IA-032024-2024-2027 is \$67,200.07 to be paid in equal installments over a 3-year period (7/1/2024-6/30/2027).

NOW, THEREFORE, BE IT RESOLVED, by the Board of Education of the District as follows:

The President of the Board of Education and the Superintendent of Schools are hereby authorized, on behalf of the District, to execute and deliver the Eastern Suffolk BOCES Multi-Year Service Agreement; the execution thereof by the President of the Board of Education and Superintendent of Schools to constitute conclusive evidence of such approval.

The officers, employees and agents of the District are hereby authorized and directed for and in the name and on behalf of the District to do all acts and things required or provided for by the provisions of the Eastern Suffolk BOCES Multi-Year Service Agreement, including all acts and things necessary to ensure the payments due thereunder, and deliver all additional certificates, instruments and documents, to pay all such fees, charges and expenses and to do all such further acts and things as may be necessary or, in the opinion of the officers, employee or agent acting, desirable and proper to effect the purpose of the foregoing resolution and to cause compliance by the District with all of the terms, covenants and provisions of the Eastern Suffolk BOCES Multi-Year Service Agreement, binding upon the District.

All in favor – Motion carried 4-0

XIX VOTE TO APPROVE/DISAPPROVE THE BOCES ADMINISTRATIVE BUDGET FOR 2024-2025

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

BE IT RESOLVED, that the Board of Education approves the BOCES Administrative Budget for 2024-2025 in the amount of \$60,530,529.

Roll Call:

Ms. Ward	Yea
Mr. Lisa	Yea
Mr. Casswell	Yea
Mrs. Sullivan	Yea

All in favor – Motion carried 4-0

XX VOTING FOR TRUSTEES TO SERVE ON THE BOARD OF COOPERATIVE EDUCATION SERVICES OF THE FIRST SUPERVISORY DISTRICT OF THE COUNTY OF SUFFOLK

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

BE IT RESOLVED, that the Board of Education elects the following candidate(s) to serve for the term commencing on July 1, 2024 and ending on June 30, 2027. (*Choose up to six*):

Arlene Barresi

Roll Call:

Ms. Ward	Yea
Mr. Lisa	Yea
Mr. Casswell	Yea
Mrs. Sullivan	Yea

Angelo Cassarino

Roll Call:

Ms. Ward	Yea
Mr. Lisa	Yea
Mr. Casswell	Yea
Mrs. Sullivan	Yea

Kelli Anne Jennings

Roll Call:

Ms. Ward	Yea
Mr. Lisa	Yea
Mr. Casswell	Yea
Mrs. Sullivan	Yea

Joseph LoSchiavo

Roll Call:

Ms. Ward	Nay
Mr. Lisa	Nay
Mr. Casswell	Nay
Mrs. Sullivan	Nay

James F. McKenna

Roll Call:

Ms. Ward	Yea
Mr. Lisa	Yea
Mr. Casswell	Yea
Mrs. Sullivan	Yea

Brian O. Mealy

Roll Call:

Ms. Ward	Yea
Mr. Lisa	Yea
Mr. Casswell	Yea
Mrs. Sullivan	Yea

Robert P. Sweeney

Roll Call:

Ms. Ward	Yea
Mr. Lisa	Yea
Mr. Casswell	Yea
Mrs. Sullivan	Yea

All in favor – Motion carried 4-0

XXI SETTLEMENT AGREEMENT

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

RESOLVED, that the Board of Education President is authorized to execute the confidential Agreement between the District and Rocky Point UFSD Employee #4567 on the matter of resignation.

All in favor – Motion carried 4-0

XXII PERSONNEL

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

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

All in favor – Motion carried 4-0

MINUTES
ROCKY POINT PUBLIC SCHOOLS
BOARD OF EDUCATION MEETING
April 18, 2024

Ms. Ward called the meeting to order at 4 p.m. in the auditorium of Rocky Point High School.

Present: Jessica Ward, President
Michael Lisa, Vice President
Susan Sullivan, Trustee
Scott O'Brien, Ed.D., Superintendent of Schools
Christopher Van Cott, Assistant Superintendent for Business
Kelly White, District Clerk

Absent: Edward Casswell, Trustee
Erin Walsh, Trustee
Susann Crossan, Assistant Superintendent
Aaron Factor Ed.D., Assistant Superintendent for Curriculum and Instruction

PLEDGE OF ALLEGIANCE

Mr. Van Cott addressed the items on the agenda:

Boiler replacement was originally included in the budget plan for 2025-26. On April 17, 2024, the District was informed that due to the State Education Department project approval timelines, as well as lead times to obtain the new equipment, it was advisable to present a capital reserve proposition to the Rocky Point voters this May. If approved at the May 21, 2024 meeting, new boilers are anticipated to be installed during the summer of 2025. If the proposition was delayed until the 2025-26 budget vote, the boilers would likely be installed in the summer of 2026 which is not advisable.

The District's architect has provided an estimated cost of \$4,300,000 to address the replacement of the (7) above-mentioned boilers. District's Counsel has also provided the necessary SEQRA resolution for the proposed work. Additionally, Mr. Van Cott noted that there are sufficient funds in the capital reserve fund to pay for the proposed replacement project. Details regarding this added proposition will also be included at the May 7 public Budget Hearing.

Mr. Van Cott inquired if there were any questions/comments on the added items.

There were no questions/comments.

II STATE ENVIRONMENTAL QUALITY REVIEW ACT (SEQRA)/2024-25 CAPITAL RESERVE PROJECT

Upon a motion made by Michael Lisa, and seconded by Susan Sullivan, the following resolution was offered:

WHEREAS, the Board of Education of the Rocky Point Union Free School District desires to embark upon the following capital improvement projects:

- **DISTRICT WIDE**

1. Replacement of existing boilers and burners (7) in total.
2. Replacement/upgrades to existing boiler room components as required such as pumps, valves, insulation, breeching etc.
3. New electrical and control wiring (the “Projects”); and

WHEREAS, said capital improvements are subject to classification under the State Environmental Quality Review Act (SEQRA); and

WHEREAS, maintenance or repair involving no substantial changes in an existing structure or facility are classified as Type II Actions under the current Department of Environmental Conservation SEQRA Regulations (Section 6 NYCRR 617.5 (c)(1)); and

WHEREAS, replacement, rehabilitation or reconstruction of a structure or a facility, in kind, on the same site, including upgrading buildings to meet building or fire codes, unless such action meets or exceeds any of the thresholds in section 617.4 are classified as Type II Actions under the current Department of Environmental Conservation SEQRA Regulations (Section 6 NYCRR 617.5 (c)(2)); and

WHEREAS, the SEQRA Regulations declare Type II Actions to be actions that have no significant impact on the environment and require no further review under SEQRA; and

WHEREAS, the Board of Education, as the only involved agency, has examined all information related to the capital improvement projects and has determined that the Project is classified as a Type II Action pursuant to Section 617.5(c)(1) and (2) of the SEQRA Regulations;

NOW, THEREFORE, BE IT RESOLVED, that the Board of Education hereby declares itself lead agency in connection with the requirements of the State Environmental Quality Review Act; and

BE IT FURTHER RESOLVED, that the Board of Education, after a review of the proposed action, hereby declares that the Projects are Type II Actions, which requires no further review under SEQR; or

BE IT FURTHER RESOLVED, that the Board of Education hereby shall forward an official copy of this Resolution to the New York State Education Department together with a copy of the correspondence from the New York State Office of Parks, Recreation and Historic Preservation in connection with its request for approval of the listed project from the New York State Education Department.

All in favor – Motion carried 3-0

III RESOLUTION TO EXPEND CAPITAL RESERVE FUNDS ON CAPITAL PROJECTS

Upon a motion made by Susan Sullivan, and seconded by Michael Lisa, the following resolution was offered:

WHEREAS, the Board of Education of the Rocky Point Union Free School District (“Board”) has determined that there is a need to undertake certain capital improvements, renovations and/or alterations to commence during the 2024-2025 school year (“Projects”); and

WHEREAS, it is required that a proposition be presented to the voters of the School District authorizing the expenditure of available funds from the District’s Capital Reserve Fund for that purpose;

NOW, THEREFORE, BE IT RESOLVED, that the Board hereby authorizes and directs that the following proposition be placed before the voters of the Rocky Point Union Free School District at the Annual District Meeting to be conducted on May 21, 2024, and that the District Clerk be hereby authorized and directed to give notice of such proposition to be voted at said Annual District Meeting by publishing notice thereof in the newspapers designated for such purpose.

PROPOSITION (Capital Reserve Project Proposition):

RESOLVED:

That the Board of Education of the Rocky Point Union Free School District (“District”), is hereby authorized to appropriate and expend from the Capital Reserve Fund, approved by the voters and established on May 16, 2006, as amended on May 21, 2013 and May 16, 2023, an amount not to exceed \$4,300,000 for the purpose of undertaking improvement projects (“Projects”) to commence during the 2024-2025 school year and to consist of: District-wide boiler and burner replacements with dual fuel capabilities where applicable and other work required in connection therewith, including preliminary costs and costs incidental thereto; and to transfer such sum into the District’s Capital Fund as needed to be expended and approved toward the costs of said Projects.

All in favor – Motion carried 3-0

IV ADJOURNMENT

At 4:08 p.m. a motion was made by Michael Lisa, and seconded by Susan Sullivan, to adjourn the meeting.

All in favor – Motion carried 3-0

Respectfully submitted,

Kelly White
District Clerk

Budget Transfer Summary Report
April 2024

From Account				To Account			
From Account #	Description	Amount	To Account #	Description	Amount	Reason	
A2630515750000	Computer Supplies	\$ 1,725.00	A2630400750000	Contractual	\$ 1,725.00	PD on New zSpace Laptops	
A2110440010000	Conference & Travel	\$ 1,376.80	A2110500010000	Supplies	\$ 1,376.80	Heggerty Phonics &	
A2110440010000	Conference & Travel	\$ 461.13	A2110500010000	Supplies	\$ 461.13	Wireless Mic for Gym	
A2138461033040	Service Contracts	\$ 600.00	A2138500033040	Supplies	\$ 600.00	HS Art Supplies	
A2110130030000	Teachers' Salaries 7-12	\$ 29,150.00	A1620400040000	Contractual	\$ 29,150.00	Greeters Desks Security Film,	
A2110130030000	Teachers' Salaries 7-12	\$ 5,865.00	A1621400040000	Contractual	\$ 5,865.00	Environmental Controls Repair,	
A2110130030000	Teachers' Salaries 7-12	\$ 3,010.00	A1620521040000	Custodial Supplies	\$ 3,010.00	Boiler Repair, Camera Replace.,	
A2110130030000	Teachers' Salaries 7-12	\$ 6,530.00	A1621520040000	Building & Grounds Materials	\$ 6,530.00	Maintenance & Custodial Supplies,	
A2110130030000	Teachers' Salaries 7-12	\$ 41,814.00	A1621560040000	Uniforms	\$ 41,814.00	Grounds, Supplies, Radio Repair.	
A2850400030000	Contractual	\$ 1,900.00	A2850500030000	Supplies	\$ 1,900.00	Supplies Supplies	
A2810400060000	Contractual	\$ 134.12	A2810500060000	Supplies	\$ 134.12	Shelves to Store Supplies	
A2110130030000	Teachers' Salaries 7-12	\$ 25,280.00	A2110400060000	Contractual	\$ 25,280.00	Gr.7 Wild Play Field Trip Costs to be Reimbursed by NYS Grant	
A2855433040000	Official Fees	\$ 3,871.44	A2855530040000	Supplies	\$ 3,871.44	Cheer National Championship Rings MS GLAX Target	
C2860200041000	Equipment	\$ 1,000.00	C2860500041000	Supplies	\$ 1,000.00	Supplies	
A2855433040000	Official Fees	\$ 365.17	A2855530040000	Supplies	\$ 365.17	Stopwatch, Timer, Whistles, Basketball Nets	

**ROCKY POINT UNION FREE SCHOOL DISTRICT
FINANCE REPORTS
FOR THE MONTH ENDED MARCH 2024**

BOARD MEETING BOOK

TREASURER'S REPORT

REPORTS FILED IN DISTRICT CLERKS OFFICE:

CASH REPORT

CASH FLOW REPORT

GENERAL FUND

TRIAL BALANCE

REVENUE STATUS REPORT

APPR. BUDGET STATUS REPORT

CAFETERIA FUND

TRIAL BALANCE

REVENUE STATUS REPORT

APPR. BUDGET STATUS REPORT

FEDERAL FUND

TRIAL BALANCE

REVENUE STATUS REPORT

APPR. BUDGET STATUS REPORT

CAPITAL FUND

TRIAL BALANCE

REVENUE STATUS REPORT

APPR. BUDGET STATUS REPORT

SCHOLARSHIP FUND

TRIAL BALANCE

REVENUE STATUS REPORT

DEBT SERVICE FUND

TRIAL BALANCE

REVENUE STATUS REPORT

APPR. BUDGET STATUS REPORT

EXTRA CLASS FUND

TRIAL BALANCE

REVENUE STATUS REPORT

APPR. BUDGET STATUS REPORT

**Rocky Point Union Free School District
Treasurer's Report
For the Month Ended: March 31, 2024**

Rocky Point Union Free School District
Treasurer's Report
Trust and Agency Checking - A204
As of March 31, 2024

Reconciled Balance as of: 2/29/2024 1,537,857.18

Receipts:
Payroll Deductions 1,562,591.66 1,562,591.66

Disbursements:
ERS 28,480.06
Cash Disbursements 1,337,572.83 (1,366,052.89)

Total available balance per General Ledger as of: 3/31/2024 1,734,395.95

Bank Balance as of: 3/31/2024 1,744,982.95

Less: Outstanding Checks (10,587.00)

Adjusted Bank Balance as of: 3/31/2024 1,734,395.95

Prepared by: Linda Bilski
Date: 4/2/2024

Reviewed by: Virginia Hollaway
Date: 4/2/2024

A204

ROCKY POINT UFSD
TRUST AND AGENCY ACCOUNT
90 ROCKY POINT YAPHANK RD
ROCKY POINT NY 11778-8423

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

ACCOUNT SUMMARY FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking		ROCKY POINT UFSD	
Previous Balance 02/29/24	\$1,595,170.97	Number of Days in Cycle	29
2 Deposits/Credits	\$1,562,591.66	Minimum Balance This Cycle	\$1,563,191.30
28 Checks/Debits	(\$1,412,779.68)	Average Collected Balance	\$1,800,611.04
Service Charges	\$0.00		
Ending Balance 03/29/24	\$1,744,982.95		

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking		ROCKY POINT UFSD		
Date	Description	Deposits/Credits	Withdrawals/Debits	Resulting Balance
03/01	Check 13711		\$26,219.00	\$1,568,951.97
03/01	Check 13715		\$5,760.67	\$1,563,191.30
03/05	Book transfer credit FROM ...5277	\$765,970.08		\$2,329,161.38
03/08	Wire transfer withdrawal The OMNI Group 030824 USD0013106713		\$102,922.31	\$2,226,239.07
03/08	ACH Withdrawal IRS USATAXPYMT 030824 ROCKY POINT SCHOOL DIS 270446XXXXX6822		\$427,698.21	\$1,798,540.86
03/08	ACH Withdrawal NYS DTF PROMPT WT Tax Paymnt 030824 ROCKY POINT UFSD 000000XXXXX1411		\$73,427.12	\$1,725,113.74
03/08	Check 13727		\$32,324.76	\$1,692,788.98
03/08	Check 13726		\$5,601.37	\$1,687,187.61
03/08	Check 13717		\$179.53	\$1,687,008.08
03/11	Check 13723		\$875.73	\$1,686,132.35
03/12	ACH Withdrawal 9102716322 CONS COLL 031224 ROCKY POINT UFSD 74728R		\$14,386.09	\$1,671,746.26
03/12	Check 13721		\$1,998.79	\$1,669,747.47
03/12	Check 13722		\$345.80	\$1,669,401.67

Thank you for banking with us.

PAGE 1 OF 2

ROCKY POINT UFSD

Bank Reconciliation for period ending on 3/31/2024



Account: Capital One Trust & Agency Checking
Cash Account(s): A 204

Ending Bank Balance:		1,744,982.95
Outstanding Checks (See listing below):	-	10,587.00
Deposits in Transit:	+	0.00
Other Credits:	+	0.00
Other Debits:	-	0.00

Adjusted Ending Bank Balance:		1,734,395.95
Cash Account Balance:		1,734,395.95

Outstanding Check Listing

Check Date	Check Number	Payee	Amount
12/12/2023	13666	ROCKY POINT ADMIN ASSOCIATION	640.00
02/05/2024	13706	ROCKY POINT ADMIN ASSOCIATION	640.00
02/16/2024	13714	ROCKY POINT ADMIN ASSOCIATION	640.00
02/16/2024	13716	ROCKY PT. TEACH. ASSOC.	16,195.59
02/16/2024	13718	VOTE COPE	174.00
03/05/2024	13716	ROCKY PT. TEACH. ASSOC.	-16,195.59
03/05/2024	13725	ROCKY POINT ADMIN ASSOCIATION	640.00
03/05/2024	13729	VOTE COPE	174.00
03/19/2024	13734	ROCKY POINT ADMIN ASSOCIATION	640.00
03/19/2024	13738	VOTE COPE	174.00
03/25/2024	13739	WESTERN SUFFOLK BOCES	6,865.00
Outstanding Check Total:			10,587.00

Prepared By _____

Approved By _____

ROCKY POINT UFSD



Cash Account Transactions Report From 3/1/2024 To 3/31/2024

Account	Account Name							
Date	Ref Number	Invoice #	Vendor ID	Explanation	Schedule	Debits	Credits	Balance
A 204	TRUST & AGENCY DEDUCTIONS							
				BALANCE 07/01/2023 - 02/29/2024		0.00	0.00	1,537,857.18
03/05/2024	1031132			Trust & Agency Deductions 3/8/24	CR-9	765,970.08	0.00	2,303,827.26
03/06/2024				See Cash Disbursement Schedule 92	CD-92	0.00	9,310.81	2,294,516.45
03/12/2024		205		ERS February 2024	JE-10	0.00	14,386.09	2,280,130.36
03/13/2024				See Cash Disbursement Schedule 96	CD-96	0.00	6,865.00	2,273,265.36
03/13/2024		207		ERS January 2024	JE-10	0.00	100.50	2,273,164.86
03/20/2024	1031178			Trust & Agency Deductions 3/22/24	CR-9	796,621.58	0.00	3,069,786.44
03/26/2024				See Cash Disbursement Schedule 101	CD-101	0.00	6,865.00	3,062,921.44
03/26/2024		222		ERS March 2024	JE-10	0.00	13,993.47	3,048,927.97
03/31/2024				See Cash Disbursement Schedule 94	CD-94	0.00	629,310.26	2,419,617.71
03/31/2024				See Cash Disbursement Schedule 99	CD-99	0.00	685,221.76	1,734,395.95
Grand Totals:						1,562,591.66	1,366,052.89	1,734,395.95

Rocky Point Union Free School District
Treasurer's Report
Net Payroll Checking - A205
As of March 31, 2024

Reconciled Balance as of:	2/29/2024		47,418.16
Receipts:			
	Payroll	<u>2,239,211.73</u>	2,239,211.73
Disbursements:			
	Disburse Net Payroll	<u>2,239,211.73</u>	<u>(2,239,211.73)</u>
Total available balance per General Ledger as of:	3/31/2024		<u>47,418.16</u>
Bank Balance as of:	3/31/2024		<u>47,418.16</u> 0.00

Prepared by: Linda Belski
Date: 4/2/2024

Reviewed by: Virginia Holway
Date: 4/2/2024

A205

ROCKY POINT UFSD
PAYROLL ACCOUNT
90 ROCKY POINT YAPHANK RD
ROCKY POINT NY 11778-8423

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

ACCOUNT SUMMARY FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking		ROCKY POINT UFSD	
Previous Balance 02/29/24	\$47,418.16	Number of Days in Cycle	29
2 Deposits/Credits	\$2,239,211.73	Minimum Balance This Cycle	\$47,418.16
11 Checks/Debits	(\$2,239,211.73)	Average Collected Balance	\$227,373.04
Service Charges	\$0.00		
Ending Balance 03/29/24	\$47,418.16		

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking		ROCKY POINT UFSD		
Date	Description	Deposits/Credits	Withdrawals/Debits	Resulting Balance
03/05	Book transfer credit FROM ...5277	\$1,089,157.32		\$1,136,575.48
03/08	ACH Withdrawal PAYROLL ROCKYPT REG SALARY 030824 PAYROLL ROCKYPT -SETT-TMOBSPEB		\$1,086,548.34	\$50,027.14
03/08	Check 100228		\$439.22	\$49,587.92
03/11	Check 100227		\$729.51	\$48,858.41
03/11	Check 100230		\$641.45	\$48,216.96
03/11	Check 100229		\$423.28	\$47,793.68
03/12	Check 100231		\$118.20	\$47,675.48
03/18	Check 100225		\$257.32	\$47,418.16
03/20	Book transfer credit FROM ...5277	\$1,150,054.41		\$1,197,472.57
03/22	ACH Withdrawal PAYROLL ROCKYPT REG SALARY 032224 PAYROLL ROCKYPT -SETT-TMOBSPEB		\$1,149,018.88	\$48,453.69
03/22	Check 100234		\$171.56	\$48,282.13
03/25	Check 100233		\$729.51	\$47,552.62
03/25	Check 100235		\$134.46	\$47,418.16
Total		\$2,239,211.73	\$2,239,211.73	

Thank you for banking with us.

ROCKY POINT UFSD



Cash Account Transactions Report From 3/1/2024 To 3/31/2024

Account	Account Name	Vendor ID	Explanation	Schedule	Debits	Credits	Balance
Date	Ref Number Invoice #						
A 205	PAYROLL						
			BALANCE 07/01/2023 - 02/29/2024		0.00	0.00	47,418.16
03/05/2024	1031131		Funding Net Payroll 3/8/24	CR-9	1,089,157.32	0.00	1,136,575.48
03/08/2024	189		Release Net Payroll	JE-10	0.00	1,089,157.32	47,418.16
03/20/2024	1031177		Funding Net Payroll 3/22/24	CR-9	1,150,054.41	0.00	1,197,472.57
03/22/2024	217		Release Net Payroll 3/22/24	JE-10	0.00	1,150,054.41	47,418.16
Grand Totals:					2,239,211.73	2,239,211.73	47,418.16

Rocky Point Union Free School District
Treasurer's Report
General Fund - Investment A2008
As of March 31, 2024

Reconciled Balance as of: 2/29/2024 17,610,157.94

Receipts:

Brookhaven Tax Revenue	822,256.78	
Charter School Aid 2023.-2024	300.00	
Commercial Gaming Revenue 2023-2024	135,634.53	
Excess Cost Revenue 2023-2024	3,045,005.00	
Federal Breakfast Revenue Feb. 2024	11,072.00	
Federal Lunch Revenue Feb. 2024	40,943.00	
General Aid End of FY Payment 2023-2024	5,320,111.08	
General Aid Spring Advance 2023-2024	2,503,585.01	
Interest Revenue	41,464.60	
Smart Schools Reimbursement	314,115.48	
State Aid Textbook 2023-2024	119,068.00	
State Aid Software 2023-2024	40,701.00	
State Aid Lib. Mats. 2023-2024	16,981.00	
State Aid Hardware 2023-2024	41,490.00	
State Breakfast Revenue Feb. 2024	12,207.00	
State Lunch Revenue Feb. 2024	46,153.00	
Summer School Revenue 2023-2024	336,637.66	
Title I A & D Revenue 2023-2024	44,112.00	
VLT Lottery Revenue 2023-2024	152,527.21	
		13,044,364.35

Disbursements:

Funding Transfer: Interfund Transfer	300,000.00	
Funding Transfer: AP Warrants	2,795,387.84	
Funding Transfer: Net Payroll	2,239,211.73	
Funding Transfer: Payroll Deductions	1,562,591.66	
		(6,897,191.23)

Total available balance per General Ledger as of: 3/31/2024 23,757,331.06

Bank Balance as of: 3/31/2024 23,757,331.06

Prepared by: Linda Bilski
Date: 4/2/2024

Reviewed by: Virginia Ho Wang
Date: 4/2/2024

A 2008

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

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

ACCOUNT SUMMARY FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking		ROCKY POINT UFSD	
Previous Balance 02/29/24	\$17,610,157.94	Number of Days in Cycle	29
11 Deposits/Credits	\$13,044,364.35	Minimum Balance This Cycle	\$14,256,418.11
Interest Paid	\$0.00	Average Collected Balance	\$17,330,725.53
9 Checks/Debits	(\$6,897,191.23)	Interest Earned During this Cycle	\$0.00
Service Charges	\$0.00	Interest Paid Year-To-Date	\$79,943.66
Ending Balance 03/29/24	\$23,757,331.06		

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking		ROCKY POINT UFSD		
Date	Description	Deposits/Credits	Withdrawals/Debits	Resulting Balance
03/04	ACH deposit BROOKHAVEN CASH DISB 030424 ROCKY POINT SCH DIST	\$474,378.90		\$18,084,536.84
03/04	ACH deposit NYS OSC ACH 030424 ROCKY POINT SCHOOL DIS AP00079920818	\$44,112.00		\$18,128,648.84
03/05	ACH deposit NYS OSC ACH 030524 ROCKY POINT SCHOOL DIS AP00079922631	\$314,115.48		\$18,442,764.32
03/05	Book transfer debit TO ...3954		\$765,970.08	\$17,676,794.24
03/05	Book transfer debit TO ...3946		\$1,089,157.32	\$16,587,636.92
03/07	Book transfer debit TO ...9596		\$823,833.59	\$15,763,803.33
03/07	Book transfer debit TO ...9588		\$300,000.00	\$15,463,803.33
03/08	ACH deposit NYS OSC ACH 030824 ROCKY POINT SCHOOL DIS AP00079935653	\$110,375.00		\$15,574,178.33
03/12	ACH deposit NYS OSC ACH 031224 ROCKY POINT SCHOOL DIS AP00079944819	\$152,527.21		\$15,726,705.54
03/14	Book transfer debit TO ...9596		\$1,470,287.43	\$14,256,418.11

Thank you for banking with us.

PAGE 1 OF 2

ROCKY POINT UFSD



Cash Account Transactions Report From 3/1/2024 To 3/31/2024

Account	Account Name							
Date	Ref Number Invoice #	Vendor ID	Explanation	Schedule	Debits	Credits	Balance	
A 2008	CAPITAL ONE INVESTMENT							
			BALANCE 07/01/2023 - 02/29/2024		0.00	0.00	17,610,157.94	
03/04/2024	1031118		Tax Warrant #9	CR-9	474,378.90	0.00	18,084,536.84	
03/04/2024	1031119		Title I A&D Revenue 2023-2024	CR-9	44,112.00	0.00	18,128,648.84	
03/05/2024	186		Smart Schools Reimbursement	JE-10	314,115.48	0.00	18,442,764.32	
03/05/2024	1031131		Funding Net Payroll 3/8/24	CR-9	0.00	1,089,157.32	17,353,607.00	
03/05/2024	1031132		Trust & Agency Deductions 3/8/24	CR-9	0.00	765,970.08	16,587,636.92	
03/07/2024	1031140		Interfund Transfer	CR-9	0.00	300,000.00	16,287,636.92	
03/07/2024	1031141		Funding Warrant #91	CR-9	0.00	823,833.59	15,463,803.33	
03/08/2024	1031142		Federal Lunch Revenue Feb. 2024	CR-9	40,943.00	0.00	15,504,746.33	
03/08/2024	1031143		Federal Breakfast Revenue Feb. 2024	CR-9	11,072.00	0.00	15,515,818.33	
03/08/2024	1031144		State Lunch Revenue Feb. 2024	CR-9	46,153.00	0.00	15,561,971.33	
03/08/2024	1031145		State Breakfast Revenue Feb. 2024	CR-9	12,207.00	0.00	15,574,178.33	
03/12/2024	1031154		VLT Lottery Revenue 2023-2024	CR-9	152,527.21	0.00	15,726,705.54	
03/14/2024	1031158		Funding Warrant #95	CR-9	0.00	1,470,287.43	14,256,418.11	
03/15/2024	1031159		Excess Cost Revenue 2023-2024	CR-9	3,045,005.00	0.00	17,301,423.11	
03/15/2024	1031160		Charter School Aid 2023-2024	CR-9	300.00	0.00	17,301,723.11	
03/18/2024	1031162		Tax Warrant #10	CR-9	347,877.88	0.00	17,649,600.99	
03/18/2024	1031209		Interest Revenue	CR-9	41,464.60	0.00	17,691,065.59	
03/20/2024	1031176		Funding Warrant #97	CR-9	0.00	334,786.67	17,356,278.92	
03/20/2024	1031177		Funding Net Payroll 3/22/24	CR-9	0.00	1,150,054.41	16,206,224.51	
03/20/2024	1031178		Trust & Agency Deductions 3/22/24	CR-9	0.00	796,621.58	15,409,602.93	
03/20/2024	1031188		Summer School Revenue 2023-2024	CR-9	205,164.76	0.00	15,614,767.69	
03/20/2024	1031189		Summer School Revenue 2023-2024	CR-9	131,472.90	0.00	15,746,240.59	
03/21/2024	1031184		State Aid Textbook 2023-2024	CR-9	119,068.00	0.00	15,865,308.59	
03/21/2024	1031185		State Aid Software 2023-2024	CR-9	40,701.00	0.00	15,906,009.59	
03/21/2024	1031186		State Aid Lib. Mats 2023-2024	CR-9	16,981.00	0.00	15,922,990.59	
03/21/2024	1031187		State Aid Hardware 2023-2024	CR-9	41,490.00	0.00	15,964,480.59	
03/27/2024	1031204		Funding Warrant #100	CR-9	0.00	166,480.15	15,798,000.44	
03/28/2024	1031205		Commercial Gaming Revenue 2023-2024	CR-9	135,634.53	0.00	15,933,634.97	
03/28/2024	1031206		General Aid Spring Advance 2023-2024	CR-9	2,503,585.01	0.00	18,437,219.98	
03/28/2024	1031207		General Aid End of FY Payment 2023-2024	CR-9	5,320,111.08	0.00	23,757,331.06	
Grand Totals:					13,044,364.35	6,897,191.23	23,757,331.06	

A2010

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

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

ACCOUNT SUMMARY FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking		ROCKY POINT UFSD	
Previous Balance 02/29/24	\$3,665,806.70	Number of Days in Cycle	29
22 Deposits/Credits	\$2,895,465.31	Minimum Balance This Cycle	\$1,971,754.48
228 Checks/Debits	(\$4,438,149.81)	Average Collected Balance	\$2,674,747.56
Service Charges	\$0.00		
Ending Balance 03/29/24	\$2,123,122.20		

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking		ROCKY POINT UFSD		
Date	Description	Deposits/Credits	Withdrawals/Debits	Resulting Balance
03/01	Customer Deposit	\$10,210.20		\$3,676,016.90
03/01	Check 122000		\$2,036.00	\$3,673,980.90
03/04	Customer Deposit	\$2,300.00		\$3,676,280.90
03/04	Check 122115		\$884,802.75	\$2,791,478.15
03/04	Check 122113		\$65,007.50	\$2,726,470.65
03/04	Check 122114		\$47,624.08	\$2,678,846.57
03/04	Check 122155		\$15,314.66	\$2,663,531.91
03/04	Check 122144		\$13,500.00	\$2,650,031.91
03/04	Check 122124		\$7,714.70	\$2,642,317.21
03/04	Check 122108		\$5,685.00	\$2,636,632.21
03/04	Check 122137		\$5,119.98	\$2,631,512.23
03/04	Check 122132		\$4,504.98	\$2,627,007.25
03/04	Check 122106		\$2,147.58	\$2,624,859.67
03/04	Check 122110		\$1,631.16	\$2,623,228.51
03/04	Check 122119		\$1,444.29	\$2,621,784.22
03/04	Check 122105		\$1,353.01	\$2,620,431.21
03/04	Check 122103		\$849.95	\$2,619,581.26
03/04	Check 122088		\$640.00	\$2,618,941.26
03/04	Check 122120		\$592.44	\$2,618,348.82

Thank you for banking with us.

ROCKY POINT UFSD		
OUTSTANDING CHECK LIST		
AS OF MARCH 31, 2024		
CHECK#	CHECK DATE	CHECK AMOUNT
121473	11/08/2023	2,460.00
121731	12/20/2023	200.00
121742	12/20/2023	323.00
121782	01/02/2024	34.00
121805	01/02/2024	34.00
121812	01/09/2024	49.46
121914	01/24/2024	389.87
121947	01/30/2024	150.00
122091	02/12/2024	200.00
122175	03/05/2024	551.60
122179	03/05/2024	330.00
122200	03/05/2024	30.00
122218	03/05/2024	56.00
122250	03/12/2024	43.20
122255	03/12/2024	675.00
122288	03/19/2024	280.00
122290	03/19/2024	546.88
122293	03/19/2024	233.12
122301	03/19/2024	6,144.60
122303	03/19/2024	16,348.61
122304	03/19/2024	3,070.00
122312	03/19/2024	290.00
122313	03/19/2024	13,050.00
122315	03/19/2024	427.09
122323	03/25/2024	728.47
122324	03/25/2024	724.80
122325	03/25/2024	80.80
122326	03/25/2024	16.80
122327	03/25/2024	5,685.00
122328	03/25/2024	123.28
122329	03/25/2024	4,091.52
122331	03/25/2024	1,766.47
122332	03/25/2024	325.00
122333	03/25/2024	380.00
122334	03/25/2024	48,265.36
122335	03/25/2024	119.50
122337	03/25/2024	10,340.00
122338	03/25/2024	2,178.00
122339	03/25/2024	248.78
122340	03/25/2024	339.56
122341	03/25/2024	229.89
122344	03/25/2024	330.39
122345	03/25/2024	15,912.00
122347	03/25/2024	200.00
122348	03/25/2024	200.00
122349	03/25/2024	1,075.00
122350	03/25/2024	8,218.63
122351	03/25/2024	200.00
122352	03/25/2024	200.00
122355	03/25/2024	59.00
122356	03/25/2024	225.00
122358	03/25/2024	780.00
122361	03/25/2024	651.19
122362	03/25/2024	180.14
122363	03/25/2024	180.00
122364	03/25/2024	180.00

122365	03/25/2024	698.46	
122366	03/25/2024	5,375.20	
122367	03/25/2024	555.39	
122368	03/25/2024	5,606.49	
122370	03/25/2024	330.50	
122371	03/25/2024	89.29	
122372	03/25/2024	657.65	
122373	03/25/2024	200.00	
122374	03/25/2024	25.00	
122375	03/25/2024	342.16	
122376	03/25/2024	114.00	
122377	03/25/2024	1,141.40	
		165,286.55	TOTAL

ROCKY POINT UFSD



Cash Account Transactions Report From 3/1/2024 To 3/31/2024

Account	Account Name	Ref Number Invoice #	Vendor ID	Explanation	Schedule	Debits	Credits	Balance
A 2010	CAPITAL ONE AP CHECKING							
				BALANCE 07/01/2023 - 02/29/2024		0.00	0.00	1,860,058.18
03/01/2024	1031109			Health, Dental, Life Deposit	CR-9	10,210.20	0.00	1,870,268.38
03/04/2024	1031115			LAX on LLC Facilities Use	CR-9	2,300.00	0.00	1,872,568.38
03/05/2024	1031121			Friends of Music Donation	CR-9	1,200.00	0.00	1,873,768.38
03/05/2024	1031122			Ohiopyle Prints, Inc. Donation	CR-9	97.94	0.00	1,873,866.32
03/06/2024				See Cash Disbursement Schedule 91	CD-91	0.00	823,833.59	1,050,032.73
03/06/2024	192			NSF Checks (2)	JE-10	0.00	2,300.00	1,047,732.73
03/07/2024	1031133			LAX on LLC Replace Bounced Checks (2)	CR-9	2,300.00	0.00	1,050,032.73
03/07/2024	1031134			Grainger Refund	CR-9	14,325.00	0.00	1,064,357.73
03/07/2024	1031135			NRT Tuition-Shoreham Wading River	CR-9	11,119.00	0.00	1,075,476.73
03/07/2024	1031141			Funding Warrant #91	CR-9	823,833.59	0.00	1,899,310.32
03/12/2024	1031146			Rocky Point PTA Donation	CR-9	218.00	0.00	1,899,528.32
03/12/2024	1031147			Community Ed Spring-Men's Basketball	CR-9	330.00	0.00	1,899,858.32
03/13/2024				See Cash Disbursement Schedule 95	CD-95	0.00	1,470,287.43	429,570.89
03/14/2024	1031157			NYSSMA Festival	CR-9	32.00	0.00	429,602.89
03/14/2024	1031158			Funding Warrant #95	CR-9	1,470,287.43	0.00	1,899,890.32
03/15/2024	1031161			Health, Dental, Life Deposit	CR-9	5,049.08	0.00	1,904,939.40
03/19/2024	1031167			The Jazz Loft Field-Trip-Schecher	CR-9	982.00	0.00	1,905,921.40
03/20/2024				See Cash Disbursement Schedule 97	CD-97	0.00	334,786.67	1,571,134.73
03/20/2024	1031172			Optimum Refund	CR-9	180.00	0.00	1,571,314.73
03/20/2024	1031173			Foster Care Rec'ble-Northport-E.Northport UFSD	CR-9	3,641.73	0.00	1,574,956.46
03/20/2024	1031174			Non Resident Tuition-Miller Place UFSD	CR-9	39,287.00	0.00	1,614,243.46
03/20/2024	1031175			Little Flower Rate Adjustment	CR-9	771.76	0.00	1,615,015.22
03/20/2024	1031176			Funding Warrant #97	CR-9	334,786.67	0.00	1,949,801.89
03/21/2024	1031179			High Note Music Festival-Schecher	CR-9	900.00	0.00	1,950,701.89
03/21/2024	1031182			NYS DOH ACH	CR-9	7,133.76	0.00	1,957,835.65
03/26/2024				See Cash Disbursement Schedule 100	CD-100	0.00	166,480.15	1,791,355.50
03/27/2024	1031204			Funding Warrant #100	CR-9	166,480.15	0.00	1,957,835.65
Grand Totals:						2,895,465.31	2,797,687.84	1,957,835.65



JPMorgan Chase Bank, N.A.
P O Box 182051
Columbus, OH 43218 - 2051

A2011

March 01, 2024 through March 29, 2024

Customer Service Information

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

00081446 WBS 802.211 09024 NNNNNNNNNN 1 000000000 C2 0000

ROCKY POINT UFSD
GENERAL FUND MONEY MARKET A/C
90 ROCKY POINT YAPHANK RD
ROCKY POINT NY 11778-8423



**Commercial Checking With Interest
Summary**

	Number	Market Value/Amount	Shares
Opening Ledger Balance		\$84,659.86	
Deposits and Credits	38	\$62,032.53	
Withdrawals and Debits	8	\$312.00	
Checks Paid	0	\$0.00	
Ending Ledger Balance		\$146,380.39	
Average Ledger Balance	\$122,657	Annual Percentage Yield Earned*	2.12%
Interest Credited This Period	\$221.44	Interest Credited Year-to-Date	\$483.60

Rate(s): 03/01 to 03/31 at 2.10%

Deposits and Credits

Ledger Date	Description	Amount
03/01	Deposit	\$2,864.00
03/01	Deposit	1,701.00
03/01	Deposit	940.00
03/01	Deposit	262.00
03/06	Deposit	8,835.00
03/06	Deposit	1,968.00
03/06	Deposit	850.00
03/06	Deposit	420.00
03/06	Deposit	200.00
03/06	Deposit	176.00
03/06	Deposit	150.00
03/08	Deposit	10,400.00
03/08	Deposit	3,059.00

* Annual Percentage Yield Earned - the percentage rate earned if balances remain on deposit for a full year with compounding, no change in the interest rate and all interest is left in the account.

Please examine this statement of account at once. By continuing to use the account, you agree that: (1) the account is subject to the Bank's deposit account agreement, and (2) the Bank has no responsibility for any error in or improper charge to the account (including any unauthorized or altered check) unless you notify us in writing of this error or charge within sixty days of the mailing or availability of the first statement on which the error or charge appears.

ROCKY POINT UFSD



Cash Account Transactions Report From 3/1/2024 To 3/31/2024

Account	Account Name							
Date	Ref Number Invoice #	Vendor ID	Explanation	Schedule	Debits	Credits	Balance	
A 2011	CHASE GENERAL FUND MM							
			BALANCE 07/01/2023 - 02/29/2024		0.00	0.00	90,426.86	
03/01/2024	1031102		4th Grade BNL Trip-O'Brien	CR-9	176.00	0.00	90,602.86	
03/01/2024	1031103		4th Grade BNL Trip-Manfredonia	CR-9	200.00	0.00	90,802.86	
03/01/2024	1031104		MSG Field Trip-Burns	CR-9	150.00	0.00	90,952.86	
03/01/2024	1031110		Yaphank Correctional Facility Field Trip-Coen	CR-9	850.00	0.00	91,802.86	
03/04/2024	196		Bounced Check	JE-10	0.00	16.00	91,786.86	
03/04/2024	1031114		NYSSMA Festival	CR-9	420.00	0.00	92,206.86	
03/04/2024	1031116		Whitney Art Museum - Meier	CR-9	1,968.00	0.00	94,174.86	
03/04/2024	1031117		Medieval Times Field Trip - O'Connell	CR-9	8,835.00	0.00	103,009.86	
03/05/2024	197		Bounced Check	JE-10	0.00	16.00	102,993.86	
03/05/2024	198		Bounced Check	JE-10	0.00	24.00	102,969.86	
03/07/2024	1031136		5th Grade Yearbook	CR-9	3,059.00	0.00	106,028.86	
03/07/2024	1031137		2nd Grade Memory Book	CR-9	2,925.00	0.00	108,953.86	
03/07/2024	1031138		HS Musical Ticket Sales	CR-9	10,400.00	0.00	119,353.86	
03/07/2024	1031139		Varsity Club Volleyball Night	CR-9	610.00	0.00	119,963.86	
03/08/2024	206		Bounced Check	JE-10	0.00	48.00	119,915.86	
03/11/2024	209		Bounced Check	JE-10	0.00	48.00	119,867.86	
03/11/2024	210		Bounced Check	JE-10	0.00	18.00	119,849.86	
03/13/2024	214		Bounced Check	JE-10	0.00	19.00	119,830.86	
03/13/2024	1031155		Art Field Trip-Meier	CR-9	336.00	0.00	120,166.86	
03/13/2024	1031156		High Note Music Festival - Schecher	CR-9	12,045.00	0.00	132,211.86	
03/18/2024	221		Bounced Check	JE-10	0.00	103.00	132,108.86	
03/19/2024	1031163		Theatre Three Field Trip-Falcone	CR-9	480.00	0.00	132,588.86	
03/19/2024	1031164		Theatre Three Field Trip-Jacobellis	CR-9	520.00	0.00	133,108.86	
03/19/2024	1031165		Theatre Three Field Trip-Hale	CR-9	120.00	0.00	133,228.86	
03/19/2024	1031166		Theatre Three Field Trip-Ciliento	CR-9	400.00	0.00	133,628.86	
03/19/2024	1031168		Yankee Stadium Field Trip-Acritelli	CR-9	3,951.00	0.00	137,579.86	
03/19/2024	1031169		Medieval Times Field Trip- O'Connell	CR-9	115.00	0.00	137,694.86	
03/19/2024	1031170		Medieval Times Field Trip-O'Connell	CR-9	1,368.00	0.00	139,062.86	
03/19/2024	1031171		MS Yearbook Sales	CR-9	420.00	0.00	139,482.86	
03/21/2024	220		Bounced Check	JE-10	0.00	20.00	139,462.86	
03/21/2024	1031180		Art Field Trip-Meier	CR-9	144.00	0.00	139,606.86	

ROCKY POINT UFSD



Cash Account Transactions Report From 3/1/2024 To 3/31/2024

Account	Account Name							
Date	Ref Number	Invoice #	Vendor ID	Explanation	Schedule	Debits	Credits	Balance
A 2011	CHASE GENERAL FUND MM							
03/21/2024	1031181			Lost Book Fines	CR-9	74.99	0.00	139,681.85
03/21/2024	1031183			JAE Yearbook-O'Mahoney	CR-9	181.00	0.00	139,862.85
03/26/2024	1031194			Theatre Three Field Trip-Friscia	CR-9	520.00	0.00	140,382.85
03/26/2024	1031195			Theatre Three Field Trip-Yashowitz	CR-9	420.00	0.00	140,802.85
03/26/2024	1031196			Theatre Three Field Trip-Zambardino	CR-9	160.00	0.00	140,962.85
03/26/2024	1031197			Theatre Three Field Trip-Reh	CR-9	540.00	0.00	141,502.85
03/26/2024	1031198			Scrap Metal	CR-9	93.10	0.00	141,595.95
03/26/2024	1031199			Theatre Three Field Trip- Banigan	CR-9	460.00	0.00	142,055.95
03/26/2024	1031200			Theatre Three Field Trip-O'Mahoney	CR-9	500.00	0.00	142,555.95
03/26/2024	1031201			Math Honor Society MOMATH Field Trip	CR-9	1,690.00	0.00	144,245.95
03/26/2024	1031202			BANN Club Swoopin' & Hoopin' Fundraiser	CR-9	1,913.00	0.00	146,158.95
03/29/2024	1031210			Interest Revenue	CR-9	221.44	0.00	146,380.39
Grand Totals:						56,265.53	312.00	146,380.39

Rocky Point Union Free School District
Treasurer's Report
NYCLASS Investment A2013
As of March 31, 2024

Reconciled Balance as of: 2/29/2024 6,158,076.77

Receipts:
Dividend 27,351.26 27,351.26

Disbursements: 0.00

Total available balance per General Ledger as of: 3/31/2024 6,185,428.03

Bank Balance as of: 3/31/2024 6,185,428.03

Prepared by: Linda Belski
Date: 4/4/2024

Reviewed by: Virginia Holly
Date: 4/4/2024

0001107-0008992 PDF 633404

Rocky Point UFSD
90 Rocky Point Yaphank Rd
Rocky Point, NY 11778

NYCLASS

NYCLASS

Average Monthly Yield: 5.2328%

	Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
General Fund Investment	6,158,076.77	0.00	0.00	27,351.26	69,778.17	6,172,702.38	6,185,428.03
TOTAL	6,158,076.77	0.00	0.00	27,351.26	69,778.17	6,172,702.38	6,185,428.03

ROCKY POINT UFSD



Cash Account Transactions Report From 3/1/2024 To 3/31/2024

Account	Date	Account Name	Ref Number Invoice #	Vendor ID	Explanation	Schedule	Debits	Credits	Balance
A 2013		NYCLASS							
					BALANCE 07/01/2023 - 02/29/2024		0.00	0.00	6,158,076.77
	03/31/2024		1031214		Dividend Income	CR-9	27,351.26	0.00	6,185,428.03
Grand Totals:							27,351.26	0.00	6,185,428.03

Rocky Point Union Free School District
Treasurer's Report
Cafeteria Checking - C207
As of March 31, 2024

Reconciled Balance as of:	2/29/2024		389,182.56
Receipts:			0.00
Disbursements:			
	NYS Annual Sales Tax	869.60	
	Cash Disbursements	<u>88,186.79</u>	<u>(89,056.39)</u>
Total available balance per General Ledger as of:	3/31/2024		<u>300,126.17</u>
Bank Balance as of:	3/31/2024		314,325.87
Less:	Outstanding Checks		<u>(14,199.70)</u>
Adjusted Bank Balance as of:	3/31/2024		<u>300,126.17</u>

Prepared by: Linda Belski
Date: 4/3/2024

Reviewed by: Virginia Holloway
Date: 4/3/2024

C207

ROCKY POINT UFSD
CAFETERIA CHECKING
90 ROCKY POINT YAPHANK RD
ROCKY POINT NY 11778-8423

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

ACCOUNT SUMMARY FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking		ROCKY POINT UFSD	
Previous Balance 02/29/24	\$415,890.20	Number of Days in Cycle	29
0 Deposits/Credits	\$0.00	Minimum Balance This Cycle	\$314,325.87
51 Checks/Debits	(\$101,564.33)	Average Collected Balance	\$366,655.39
Service Charges	\$0.00		
Ending Balance 03/29/24	\$314,325.87		

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking			ROCKY POINT UFSD		
Date	Description		Deposits/Credits	Withdrawals/Debits	Resulting Balance
03/04	Check 13344			\$6,632.39	\$409,257.81
03/04	Check 13350			\$3,684.43	\$405,573.38
03/04	Check 13355			\$3,648.34	\$401,925.04
03/04	Check 13346			\$2,590.40	\$399,334.64
03/04	Check 13356			\$1,511.71	\$397,822.93
03/04	Check 1335			\$1,457.55	\$396,365.38
03/04	Check 13354			\$1,414.35	\$394,951.03
03/04	Check 13348			\$1,100.88	\$393,850.15
03/04	Check 13352			\$487.25	\$393,362.90
03/05	Check 13347			\$1,030.55	\$392,332.35
03/06	Check 13349			\$2,355.00	\$389,977.35
03/07	Check 13345			\$469.10	\$389,508.25
03/08	Check 13351			\$317.69	\$389,190.56
03/11	Check 13357			\$12,540.71	\$376,649.85
03/11	Check 13365			\$2,259.18	\$374,390.67
03/11	Check 13367			\$1,319.96	\$373,070.71
03/11	Check 13360			\$1,032.52	\$372,038.19
03/11	Check 13366			\$644.75	\$371,393.44
03/11	Check 13368			\$368.64	\$371,024.80

Thank you for banking with us.



Account: Capital One Cafeteria Checking
Cash Account(s): C 207

Ending Bank Balance:	-	314,325.87
Outstanding Checks (See listing below):	-	14,199.70
Deposits in Transit:	+	0.00
Other Credits:	+	0.00
Other Debits:	-	0.00

Adjusted Ending Bank Balance:	300,126.17
Cash Account Balance:	300,126.17

Outstanding Check Listing

Check Date	Check Number	Payee	Amount
12/20/2023	13265	Traci McElroy	8.00
03/05/2024	13362	SHAKIA HALL	36.31
03/19/2024	13382	B & G Foodservice Equipment, LLC	1,066.00
03/19/2024	13386	SHAKIA HALL	62.04
03/25/2024	13395	BIG GEYSER INC.	1,211.20
03/25/2024	13396	BROOKLYN BAGELS AND CAFE, INC.	498.76
03/25/2024	13397	HORMEL FOODS SALES LLC	1,213.20
03/25/2024	13400	NARDONE BROS BAKING CO	1,259.74
03/25/2024	13401	PROCOLD EAST	7,667.06
03/25/2024	13402	RICH PRODUCTS CORPORATION	1,177.39
Outstanding Check Total:			14,199.70

Prepared By

Approved By

ROCKY POINT UFSD



Cash Account Transactions Report From 3/1/2024 To 3/31/2024

Account	Account Name							
Date	Ref Number	Invoice #	Vendor ID	Explanation	Schedule	Debits	Credits	Balance
C 207	CAPITAL ONE CHECKING							
				BALANCE 07/01/2023 - 02/29/2024		0.00	0.00	389,182.56
03/01/2024	232			NYS Annual Sales Tax 3/1/23-2/29/24	JE-10	0.00	869.60	388,312.96
03/06/2024				See Cash Disbursement Schedule 26	CD-26	0.00	20,091.75	368,221.21
03/13/2024				See Cash Disbursement Schedule 27	CD-27	0.00	8,390.10	359,831.11
03/20/2024				See Cash Disbursement Schedule 28	CD-28	0.00	34,184.71	325,646.40
03/26/2024				See Cash Disbursement Schedule 29	CD-29	0.00	25,520.23	300,126.17
Grand Totals:						0.00	89,056.39	300,126.17

Rocky Point Union Free School District
Treasurer's Report
Cafeteria Fund ACH C208
As of March 31, 2024

Reconciled Balance as of: 2/29/2024 230,295.39

Receipts:

Café ACH Deposits	29,181.95	
Cafeteria Receipts	14,155.82	
Interest	<u>449.68</u>	
		43,787.45

Disbursements: 0.00

Total available balance per General Ledger as of: 3/31/2024 274,082.84

Bank Balance as of: 3/31/2024 272,980.31

Add: Deposit in Transit: 1,102.53

Adjusted Bank Balance as of: 3/31/2024 274,082.84

Prepared by: Linda Bieliski
Date: 4/8/2024

Reviewed by: Jacqueline Ables
Date: 4/8/2024



JPMorgan Chase Bank, N.A.
 P O Box 182051
 Columbus, OH 43218 - 2051

C208

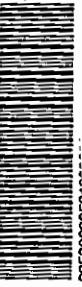
March 01, 2024 through March 29, 2024

CUSTOMER SERVICE INFORMATION

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

00053083 DDA 802 212 09024 NNNNNNNNNN 1 000000000 C1 0000

ROCKY POINT UFSD
 SCHOOL LUNCH ACH
 90 ROCKY POINT YAPHANK RD
 ROCKY POINT NY 11778-8423



CHECKING SUMMARY

Commercial Checking With Interest

	INSTANCES	AMOUNT
Beginning Balance		\$227,455.60
Deposits and Additions	259	45,524.71
Ending Balance	259	\$272,980.31
Annual Percentage Yield Earned This Period		2.12%
Interest Paid This Period		\$449.68
Interest Paid Year-to-Date		\$1,119.63
Interest paid in 2023		\$5,283.24.

DEPOSITS AND ADDITIONS

DATE	DESCRIPTION	AMOUNT
03/01	Deposit	\$199.85
03/01	Deposit	160.50
03/01	Deposit	123.81
03/01	Deposit	107.00
03/01	Deposit	79.50
03/01	Deposit	64.75
03/01	Deposit	62.51
03/01	Deposit	44.00
03/01	Deposit	36.81
03/01	Deposit	21.50
03/01	Deposit	16.50
03/01	Deposit	13.00
03/01	Deposit	11.00

ROCKY POINT UFSD

Cash Account Transactions Report From 3/1/2024 To 3/31/2024



Account	Account Name								
Date	Ref Number	Invoice #	Vendor ID	Explanation	Schedule	Debits	Credits	Balance	
C 208	CHASE ACH REVENUE								
				BALANCE 07/01/2023 - 02/29/2024		0.00	0.00	230,295.39	
03/01/2024	1031148			Cafeteria Receipts 3/1/24	CR-9	703.17	0.00	230,998.56	
03/04/2024	1031149			Cafeteria Receipts 3/4/24	CR-9	670.96	0.00	231,669.52	
03/05/2024	1031150			Cafeteria Receipts 3/5/24	CR-9	689.99	0.00	232,359.51	
03/06/2024	1031151			Cafeteria Receipts 3/6/24	CR-9	790.18	0.00	233,149.69	
03/07/2024	1031152			Cafeteria Receipts 3/7/24	CR-9	984.88	0.00	234,134.57	
03/08/2024	1031153			Cafeteria Receipts 3/8/24	CR-9	799.94	0.00	234,934.51	
03/15/2024	1031203			Cafeteria Receipts 3/11-3/15/24	CR-9	3,645.69	0.00	238,580.20	
03/29/2024	1031211			Interest Revenue	CR-9	449.68	0.00	239,029.88	
03/31/2024	238			Miscellaneous Revenue	JE-10	2.10	0.00	239,031.98	
03/31/2024	1031215			FJC ACH	CR-9	1,268.00	0.00	240,299.98	
03/31/2024	1031216			FJC ACH	CR-9	2,532.25	0.00	242,832.23	
03/31/2024	1031217			JAE ACH	CR-9	2,172.50	0.00	245,004.73	
03/31/2024	1031218			JAE ACH	CR-9	3,742.50	0.00	248,747.23	
03/31/2024	1031219			RPHS ACH	CR-9	11,579.85	0.00	260,327.08	
03/31/2024	1031220			RPMS ACH	CR-9	7,886.85	0.00	268,213.93	
03/31/2024	1031229			Cafeteria Receipts 3/18-3/22/24	CR-9	3,714.87	0.00	271,928.80	
03/31/2024	1031231			Cafeteria Receipts 3/25-3/29/24	CR-9	2,154.04	0.00	274,082.84	
Grand Totals:						43,787.45	0.00	274,082.84	

Rocky Point Union Free School District
Treasurer's Report
Scholarship Fund Checking - CM200
As of March 31, 2024

Reconciled Balance as of:	2/29/2024		48,853.05
Receipts:			
	Live Like Susie Donation	<u>100.00</u>	100.00
Disbursements:			<u>0.00</u>
Total available balance per General Ledger as of:	3/31/2024		<u><u>48,953.05</u></u>
Bank Balance as of:	3/31/2024		49,203.05
Less:	Outstanding Checks		<u>(250.00)</u>
Adjusted Bank Balance as of:	3/31/2024		<u><u>48,953.05</u></u>

Prepared by: Linda Bilski
Date: 4/3/2024

Reviewed by: Virginia Holley
Date: 4/3/2024

CM200

ROCKY POINT UFSD
SCHOLARSHIP CHECKING
90 ROCKY POINT YAPHANK RD
ROCKY POINT NY 11778-8423

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

ACCOUNT SUMMARY FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking		ROCKY POINT UFSD	
Previous Balance 02/29/24	\$49,103.05	Number of Days in Cycle	29
1 Deposits/Credits	\$100.00	Minimum Balance This Cycle	\$49,103.05
0 Checks/Debits	\$0.00	Average Collected Balance	\$49,186.92
Service Charges	\$0.00		
Ending Balance 03/29/24	\$49,203.05		

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking		ROCKY POINT UFSD		
Date	Description	Deposits/Credits	Withdrawals/Debits	Resulting Balance
03/05	Customer Deposit	\$100.00		\$49,203.05
Total		\$100.00	\$0.00	

Thank you for banking with us.

CM3200

ROCKY POINT UFSD
EXTRA CLASS CHECKING
90 ROCKY POINT YAPHANK RD
ROCKY POINT NY 11778-8423

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

ACCOUNT SUMMARY FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking		ROCKY POINT UFSD	
Previous Balance 02/29/24	\$77,100.55	Number of Days in Cycle	29
0 Deposits/Credits	\$0.00	Minimum Balance This Cycle	\$74,804.35
2 Checks/Debits	(\$2,296.20)	Average Collected Balance	\$74,910.11
Service Charges	\$0.00		
Ending Balance 03/29/24	\$74,804.35		

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking		ROCKY POINT UFSD		
Date	Description	Deposits/Credits	Withdrawals/Debits	Resulting Balance
03/01	Check 11518		\$2,062.00	\$75,038.55
03/15	Check 11519		\$234.20	\$74,804.35
Total		\$0.00	\$2,296.20	

Govt Banking Blended Chking		ROCKY POINT UFSD						
Checks * designates gap in check sequence								
Check No.	Date	Amount	Check No.	Date	Amount	Check No.	Date	Amount
11518	03/01	\$2,062.00	11519	03/15	\$234.20			

Thank you for banking with us.

ROCKY POINT UFSD

Bank Reconciliation for period ending on 3/31/2024



Account: Capital One Extra Class Checking
Cash Account(s): CM3 200

Ending Bank Balance:	74,804.35
Outstanding Checks (See listing below):	- 659.00
Deposits in Transit:	+ 0.00
Other Credits:	+ 0.00
Other Debits:	- 0.00

Adjusted Ending Bank Balance:	74,145.35
Cash Account Balance:	74,145.35

Outstanding Check Listing

Check Date	Check Number	Payee	Amount
03/25/2024	11520	JEAN COSTA	274.00
03/25/2024	11521	EDUCATIONAL THEATRE ASSOC	385.00
Outstanding Check Total:			659.00

Prepared By

Approved By

ROCKY POINT UFSD



Cash Account Transactions Report From 3/1/2024 To 3/31/2024

Account	Date	Account Name	Ref Number Invoice #	Vendor ID	Explanation	Schedule	Debits	Credits	Balance
CM3 200		Extraclass Checking							
					BALANCE 07/01/2023 - 02/29/2024		0.00	0.00	75,038.55
	03/31/2024				See Cash Disbursement Schedule 15	CD-15	0.00	234.20	74,804.35
	03/31/2024				See Cash Disbursement Schedule 16	CD-16	0.00	659.00	74,145.35
					Grand Totals:		0.00	893.20	74,145.35

Rocky Point Union Free School District
Treasurer's Report
Federal Fund Checking - F205
As of March 31, 2024

Reconciled Balance as of:	2/29/2024		145,347.54
Receipts:			
	Interfund Transfer	<u>300,000.00</u>	300,000.00
Disbursements:			
	Cash Disbursements	<u>142,555.05</u>	<u>(142,555.05)</u>
Total available balance per General Ledger as of:	3/31/2024		<u>302,792.49</u>
Bank Balance as of:	3/31/2024		309,792.49
Less:	Outstanding Checks		<u>(7,000.00)</u>
Adjusted Bank Balance as of:	3/31/2024		<u>302,792.49</u> 0.00

Prepared by:
Date:

Linda Beluski
4/3/2024

Reviewed by:
Date:

Virginia Holloway
4/3/2024

F205

ROCKY POINT UFSD
FEDERAL CHECKING
90 ROCKY POINT YAPHANK RD
ROCKY POINT NY 11778-8423

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

ACCOUNT SUMMARY FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking			ROCKY POINT UFSD	
Previous Balance 02/29/24	\$284,070.10	Number of Days in Cycle	29	
1 Deposits/Credits	\$300,000.00	Minimum Balance This Cycle	\$145,347.54	
16 Checks/Debits	(\$274,277.61)	Average Collected Balance	\$331,752.18	
Service Charges	\$0.00			
Ending Balance 03/29/24	\$309,792.49			

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking			ROCKY POINT UFSD	
Date	Description	Deposits/Credits	Withdrawals/Debits	Resulting Balance
03/04	Check 4944		\$30,000.00	\$254,070.10
03/04	Check 4940		\$15,406.55	\$238,663.55
03/04	Check 4941		\$13,678.45	\$224,985.10
03/04	Check 4939		\$4,216.00	\$220,769.10
03/04	Check 4942		\$3,600.00	\$217,169.10
03/05	Check 4932		\$42,920.00	\$174,249.10
03/05	Check 4943		\$28,901.56	\$145,347.54
03/07	Book transfer credit FROM ...5277	\$300,000.00		\$445,347.54
03/11	Check 4546		\$24,937.20	\$420,410.34
03/11	Check 4949		\$20,781.00	\$399,629.34
03/11	Check 4945		\$181.38	\$399,447.96
03/12	Check 4950		\$17,442.00	\$382,005.96
03/14	Check 4947		\$28,901.56	\$353,104.40
03/14	Check 4948		\$227.50	\$352,876.90
03/19	Check 4951		\$11,800.00	\$341,076.90
03/25	Check 4953		\$27,684.41	\$313,392.49
03/25	Check 4954		\$3,600.00	\$309,792.49
Total		\$300,000.00	\$274,277.61	

Thank you for banking with us.



Account: Capital One Federal Checking
Cash Account(s): F 205

Ending Bank Balance:		309,792.49
Outstanding Checks (See listing below):	-	7,000.00
Deposits in Transit:	+	0.00
Other Credits:	+	0.00
Other Debits:	-	0.00
<hr/>		
Adjusted Ending Bank Balance:		302,792.49
Cash Account Balance:		302,792.49

Outstanding Check Listing

Check Date	Check Number	Payee	Amount
03/19/2024	4952	B & G Foodservice Equipment, LLC	7,000.00
Outstanding Check Total:			7,000.00

Prepared By

Approved By

Rocky Point Union Free School District
Treasurer's Report
Capital Fund Checking - H205
As of March 31, 2024

Reconciled Balance as of:	2/29/2024	228,875.33
Receipts:		0.00
Disbursements:		<u>0.00</u>
Total available balance per General Ledger as of:	3/31/2024	<u><u>228,875.33</u></u>
Bank Balance as of:	3/31/2024	<u><u>228,875.33</u></u>

Prepared by: Linda Bilski
Date: 4/3/2024

Reviewed by: Virginia Holway
Date: 4/3/2024

H205

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

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

ACCOUNT SUMMARY FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking		ROCKY POINT UFSD	
Previous Balance 02/29/24	\$228,875.33	Number of Days in Cycle	29
0 Deposits/Credits	\$0.00	Minimum Balance This Cycle	\$228,875.33
0 Checks/Debits	\$0.00	Average Collected Balance	\$228,875.33
Service Charges	\$0.00		
Ending Balance 03/29/24	\$228,875.33		

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking		ROCKY POINT UFSD		
<i>Date</i>	<i>Description</i>	<i>Deposits/Credits</i>	<i>Withdrawals/Debits</i>	<i>Resulting Balance</i>
03/01				\$228,875.33
No Account Activity this Statement Period				
03/29				\$228,875.33
Total		\$0.00	\$0.00	
No Items Processed				

Thank you for banking with us.

ROCKY POINT UFSD



Cash Account Transactions Report From 3/1/2024 To 3/31/2024

Account	Date	Account Name	Ref Number	Invoice #	Vendor ID	Explanation	Schedule	Debits	Credits	Balance
H 205		CAPITAL ONE CHECKING								
						BALANCE 07/01/2023 - 02/29/2024		0.00	0.00	228,875.33
						Grand Totals:		0.00	0.00	228,875.33

Rocky Point Union Free School District
Treasurer's Report
Debt Service Fund Checking - V200
As of March 31, 2024

Reconciled Balance as of:	2/29/2024	129,152.42
Receipts:		0.00
Disbursements:		0.00
Total available balance per General Ledger as of:	3/31/2024	<u>129,152.42</u>
Bank Balance as of:	3/31/2024	<u>129,152.42</u>

Prepared by: Linda Bielcki
Date: 4/3/2024

Reviewed by: Virginia Holway
Date: 4/3/2024

V200

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

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

ACCOUNT SUMMARY FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking		ROCKY POINT UFSD	
Previous Balance 02/29/24	\$129,152.42	Number of Days in Cycle	29
0 Deposits/Credits	\$0.00	Minimum Balance This Cycle	\$129,152.42
0 Checks/Debits	\$0.00	Average Collected Balance	\$129,152.42
Service Charges	\$0.00		
Ending Balance 03/29/24	\$129,152.42		

ACCOUNT DETAIL FOR PERIOD MARCH 01, 2024 - MARCH 29, 2024

Govt Banking Blended Chking		ROCKY POINT UFSD		
Date	Description	Deposits/Credits	Withdrawals/Debits	Resulting Balance
03/01				\$129,152.42
No Account Activity this Statement Period				
03/29				\$129,152.42
Total		\$0.00	\$0.00	
No Items Processed				

Thank you for banking with us.

ROCKY POINT UFSD



Cash Account Transactions Report From 3/1/2024 To 3/31/2024

Account	Date	Account Name	Ref Number Invoice #	Vendor ID	Explanation	Schedule	Debits	Credits	Balance
V 200		CASH							
					BALANCE 07/01/2023 - 02/29/2024		0.00	0.00	129,152.42
					Grand Totals:		0.00	0.00	129,152.42

**CASH REPORT
FOR THE MONTH ENDED
March 31, 2024**

GENERAL FUND

A204	Capital One Trust & Agency	\$	1,734,395.95
A205	Capital One Payroll	\$	47,418.16
A210	Petty Cash	\$	600.00
A2008	Capital One Investment	\$	23,757,331.06
A2010	Capital One AP Checking	\$	1,957,835.65
A2011	JP Morgan Chase-Money Market	\$	146,380.39
A2013	NYCLASS Investment	\$	6,185,428.03

Total General Fund: \$ 33,829,389.24

SCHOOL LUNCH FUND

C207	Capital One Lunch Fund Checking	\$	300,126.17
C208	JP Morgan Chase-Lunch ACH	\$	274,082.84

Total School Lunch Fund: \$ 574,209.01

SPECIAL AID FUND

F205	Capital One Federal Checking	\$	302,792.49
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Total Special Aid Fund: \$ 302,792.49

CAPITAL FUND

H205	Capital One - Checking	\$	228,875.33
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Total Capital Fund: \$ 228,875.33

SCHOLARSHIP FUND

CM200	Capital One - Checking	\$	48,953.05
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Total Scholarship Fund \$ 48,953.05

DEBT SERVICE FUND

V200	Capital One - Money Market	\$	129,152.42
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Total Debt Service Fund \$ 129,152.42

EXTRA CLASS FUND

CM3200	Capital One - Checking	\$	74,145.35
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Total Extra Class Fund \$ 74,145.35

Total All Funds: \$ 35,187,516.89

**ROCKY POINT UNION FREE SCHOOL DISTRICT
FOR THE MONTH ENDED MARCH 2024**

GENERAL FUND

ROCKY POINT UFSD



Trial Balance Report From 7/1/2023 - 3/31/2024

Account	Description	Debits	Credits
A 2008	CAPITAL ONE INVESTMENT	23,757,331.06	0.00
A 2010	CAPITAL ONE AP CHECKING	1,957,835.65	0.00
A 2011	CHASE GENERAL FUND MM	146,380.39	0.00
A 2013	NYCLASS	6,185,428.03	0.00
A 204	TRUST & AGENCY DEDUCTIONS	1,734,395.95	0.00
A 205	PAYROLL	47,418.16	0.00
A 210	PETTY CASH	600.00	0.00
A 380	ACCOUNTS RECEIVABLE	57,578.52	0.00
A 391	DUE FROM FEDERAL FUND	800,364.70	0.00
A 3912	DUE FROM SCHOOL LUNCH	39,510.30	0.00
A 3912C	DUE FROM SCHOOL LUNCH PAYROLL	57,650.72	0.00
A 3917	DUE FROM DEBT SERVICE	3,143.02	0.00
A 391F	DUE FROM FEDERAL FUND PAYROLL	531,643.65	0.00
A 4805	PREPAID INSURANCE	60,000.00	0.00
A 510	ESTIMATED REVENUES	91,268,669.11	0.00
A 521	ENCUMBRANCES	27,978,166.34	0.00
A 522	EXPENDITURES	53,590,453.74	0.00
A 599	APPROPRIATED FUND BALANCE	3,582,680.01	0.00
A 600	ACCOUNTS PAYABLE	0.00	161,521.47
A 620	TAX ANTICIP NOTES PAYABLE	0.00	3,500,000.00
A 630	DUE TO OTHER FUNDS	0.00	5,049.07
A 6301	DUE TO SCHOOL LUNCH FUND	0.00	111,090.45
A 6302	DUE TO CAPITAL FUND	0.00	319,858.15
A 6303	DUE TO FEDERAL FUND	0.00	1,000.00
A 6305	DUE TO DEBT SERVICE	0.00	1,922.74
A 6306	DUE TO SCHOLARSHIP FUND	0.00	867.40
A 632	DUE TO STATE TEACHERS' RETIREMENT	0.00	149,857.80
A 726FICA	SOCIAL SECURITY TAX	0.00	2.29
A 726MEDI	MEDICARE TAX	0.00	0.54
A 738A	SCHOOL ACTIVITES FJC	0.00	3,231.81
A 738B	SCHOOL ACTIVITES JAE	0.00	17,502.37
A 738C	SCHOOL ACTIVITES MS	0.00	10,441.17
A 738D	TESTING HS	0.00	8,493.25
A 755	ADMIN KEN EDWARDS SCHOLARSHIP	0.00	980.00
A 761	VISION	0.00	2,002.59
A 762	ERS	0.00	649.13
A 763	ERS LOANS	0.00	3,776.68
A 764	ERSAR and ERSAR414 ERS ARREARS	0.00	736.80
A 771	OTHER-TEA. RETIRE.	0.00	21.40
A 777	MUSIC DEPT HIGH SCHOOL	0.00	3,156.88
A 778	MARK TWAIN DINNER	0.00	3,198.00
A 779	AP TEST DEPOSITS	0.00	18,098.88
A 780	NYSSMA	0.00	104.00
A 787	LONG TERM DISABILITY	206.02	0.00
A 789	OTHER VOTE COPE	0.00	564.00
A 790	AFLAC -CPP	0.00	3,757.31

ROCKY POINT UFSD

Trial Balance Report From 7/1/2023 - 3/31/2024



Account	Description	Debits	Credits
A 791	AFLAC - STD	0.00	1,213.88
A 792	AFLAC - ACC	0.00	1,161.58
A 793	AFLAC - HSP	0.00	845.20
A 797	SCHOOL ACTIVITES HS	0.00	20,024.93
A 800	YEARBOOK FJC	0.00	2,906.00
A 801	YEARBOOK JAE	0.00	3,233.00
A 806	NONSPENDABLE FUND BALANCE	0.00	60,000.00
A 814	WORKER'S COMPENSATION RESERVE	0.00	1,931,458.12
A 815	UNEMPLOYMENT INSURANCE RESERVE	0.00	449,254.53
A 821	RESERVE FOR ENCUMBRANCES	0.00	27,978,689.29
A 825	ERS RESERVE	0.00	4,054,504.06
A 826	TRS SUB FUND RESERVE	0.00	3,305,347.91
A 861	PROPERTY LOSS RESERVE	0.00	29,896.91
A 862	LIABILITY LOSS RESERVE	0.00	43,531.12
A 867	RESERVE FOR EMPLOYEE BENEFITS	0.00	3,924,693.85
A 878	CAPITAL RESERVE	0.00	3,644,031.10
A 878.1	CAPITAL RESERVE 2023	0.00	708,303.00
A 909	FUND BALANCE	0.00	4,456,899.71
A 910	APPROPRIATED FUND BALANCE	0.00	2,031,198.00
A 960	APPROPRIATIONS	0.00	94,851,349.12
A 980	REVENUES	0.00	59,973,029.88
A Fund Totals:		211,799,455.37	211,799,455.37
Grand Totals:		211,799,455.37	211,799,455.37

Revenue Status Report By Function From 7/1/2023 To 3/31/2024

Account	Description	Budget	Adjustments	Revised Budget	Revenue Earned	Unearned Revenue
<u>A 1001</u>	REAL PROPERTY TAX	50,842,314.00	0.00	50,842,314.00	30,866,253.92	19,976,060.08
<u>A 1081</u>	PILOT	31,971.00	0.00	31,971.00	19,139.93	12,831.07
<u>A 1085</u>	STAR REIMBURSEMENT	4,500,000.00	0.00	4,500,000.00	3,999,147.39	500,852.61
<u>A 1315</u>	CONTINUING ED-SUMMER	4,000.00	0.00	4,000.00	0.00	4,000.00
<u>A 1315.A</u>	CONTINUING ED-FALL	5,000.00	0.00	5,000.00	880.00	4,120.00
<u>A 1315.B</u>	CONTINUING ED-SPRING	5,000.00	0.00	5,000.00	330.00	4,670.00
<u>A 1316</u>	DRIVER EDUCATION-SUMMER	20,000.00	0.00	20,000.00	0.00	20,000.00
<u>A 1316.A</u>	DRIVERS ED-FALL	17,500.00	0.00	17,500.00	36,140.00	-18,640.00
<u>A 1316.B</u>	DRIVERS ED-SPRING	17,500.00	0.00	17,500.00	44,480.00	-26,980.00
<u>A 1489</u>	OTHER CHARGES-PROM, YEARBOOK	70,000.00	0.00	70,000.00	0.00	70,000.00
<u>A 2230</u>	DAY SCHOOL TUITION FROM OTHER DISTRICTS	0.00	0.00	0.00	98,342.25	-98,342.25
<u>A 2401</u>	INTEREST AND EARNINGS	90,000.00	0.00	90,000.00	495,668.43	-405,668.43
<u>A 2655</u>	TICKET AND MINOR SALES, OTHER	0.00	0.00	0.00	23,293.15	-23,293.15
<u>A 2655.A</u>	FACILITIES USE	0.00	0.00	0.00	3,350.00	-3,350.00
<u>A 2656</u>	POCKET THEATER	0.00	0.00	0.00	1,010.00	-1,010.00
<u>A 2680</u>	INSURANCE RECOVERIES	0.00	0.00	0.00	7,512.48	-7,512.48
<u>A 2690</u>	FINES - LOST BOOKS	0.00	0.00	0.00	201.00	-201.00
<u>A 2703</u>	PRIOR YEAR REFUNDS-OTHER (NOT TRANS)	350,000.00	0.00	350,000.00	853,709.31	-503,709.31
<u>A 2704</u>	REFUNDS	0.00	0.00	0.00	951.76	-951.76
<u>A 2705</u>	GIFTS AND DONATIONS	0.00	6,140.11	6,140.11	3,436.21	2,703.90
<u>A 2710</u>	PREMIUM ON OBLIGATIONS	0.00	0.00	0.00	7,735.00	-7,735.00
<u>A 2770</u>	OTHER UNCLASSIFIED	0.00	0.00	0.00	76,047.56	-76,047.56
<u>A 2772</u>	E-RATE REVUENE	0.00	0.00	0.00	22,715.47	-22,715.47
<u>A 2801</u>	INTERFUND REVENUE	23,000.00	0.00	23,000.00	167,052.71	-144,052.71
<u>A 3100</u>	PRIOR YEAR STATE AID	0.00	0.00	0.00	84,340.10	-84,340.10
<u>A 3101</u>	GROSS STATE AID - BASIC	22,937,228.00	0.00	22,937,228.00	12,680,381.82	10,256,846.18
<u>A 3101.E</u>	STATE AID EXCESS COST	4,500,000.00	0.00	4,500,000.00	4,773,146.00	-273,146.00
<u>A 3102</u>	STATE AID LOTTERY	6,000,000.00	0.00	6,000,000.00	5,348,911.56	651,088.44
<u>A 3103</u>	STATE AID BOCES	1,482,691.00	0.00	1,482,691.00	0.00	1,482,691.00
<u>A 3260</u>	STATE AID TEXTBOOKS	165,000.00	0.00	165,000.00	160,363.00	4,637.00
<u>A 3262</u>	STATE AID COMPUTER SOFTWARE	84,000.00	0.00	84,000.00	82,191.00	1,809.00
<u>A 3263</u>	STATE AID LIBRARY LOAN PROGRAM	17,325.00	0.00	17,325.00	16,981.00	344.00
<u>A 3285</u>	STATE AID MEDICAID	100,000.00	0.00	100,000.00	0.00	100,000.00

ROCKY POINT UFSD

Revenue Status Report By Function From 7/1/2023 To 3/31/2024



Account	Description	Budget	Adjustments	Revised Budget	Revenue Earned	Unearned Revenue
<u>A 3289</u>	OTHER STATE AID	0.00	0.00	0.00	1,000.00	-1,000.00
<u>A 4285</u>	MEDICAID MANAGEMENT REIMBURSEMENT	0.00	0.00	0.00	98,318.83	-98,318.83
A Totals:		91,262,529.00	6,140.11	91,268,669.11	59,973,029.88	31,295,639.23
Grand Totals:		91,262,529.00	6,140.11	91,268,669.11	59,973,029.88	31,295,639.23



Account	Description		Budget	Adjustments	Adj. Budget	Expensed	Encumbered	Available
1010	BOARD OF EDUCATION	*	12,150.00	0.00	12,150.00	8,431.50	722.50	2,996.00
1040	DISTRICT CLERK	*	18,976.00	0.00	18,976.00	13,867.15	5,108.85	0.00
1060	DISTRICT MEETING	*	10,900.00	0.00	10,900.00	0.00	304.70	10,595.30
1240	CHIEF SCHOOL ADMINISTRATOR	*	374,576.00	16,161.70	390,737.70	284,634.46	102,857.16	3,246.08
1310	BUSINESS ADMINISTRATION	*	824,241.00	-2,846.64	821,394.36	555,109.24	215,044.06	51,241.06
1320	AUDITING	*	75,532.00	13,818.00	89,350.00	57,991.64	31,358.36	0.00
1325	TREASURER	*	10,710.00	0.00	10,710.00	9,513.44	0.00	1,196.56
1345	PURCHASING	*	47,024.00	79.00	47,103.00	33,278.98	16,719.86	-2,895.84
1380	FISCAL AGENT FEE	*	11,730.00	0.00	11,730.00	9,000.00	0.00	2,730.00
1420	LEGAL	*	55,000.00	0.00	55,000.00	43,553.60	11,446.40	0.00
1430	PERSONNEL	*	548,588.00	572.78	549,160.78	367,325.89	168,694.16	13,140.73
1480	PUBLIC INFORMATION AND SERVICES	*	40,976.00	0.00	40,976.00	23,076.12	17,899.88	0.00
1620	OPERATION OF PLANT	*	5,222,148.00	164,536.46	5,386,684.46	3,702,262.20	1,441,982.80	242,439.46
1621	MAINTENANCE OF PLANT	*	1,335,700.00	839,836.41	2,175,536.41	1,299,086.58	812,595.75	63,854.08
1670	CENTRAL PRINTING AND MAILING	*	73,000.00	20,390.00	93,390.00	72,048.07	11,494.37	9,847.56
1680	CENTRAL DATA PROCESSING	*	1,265,164.00	-38,478.00	1,226,686.00	658,925.84	567,760.16	0.00
1910	UNALLOCATED INSURANCE	*	631,800.00	0.00	631,800.00	573,671.33	5,000.00	53,128.67
1981	ADMINISTRATIVE CHARGE-BOCES	*	356,229.00	0.00	356,229.00	237,486.00	118,743.00	0.00
2010	CURRICULUM DEVELOPMENT AND SUPERVISION	*	379,826.00	1,095.00	380,921.00	213,643.68	110,083.47	57,193.85
2020	SUPERVISION - ADMINISTRATION	*	2,224,080.00	3,232.16	2,227,312.16	1,498,425.20	548,376.00	180,510.96
2060	RESEARCH, PLANNING AND EVALUATION	*	94,000.00	0.00	94,000.00	55,100.00	0.00	38,900.00
2070	INSERVICE TRAINING - INSTRUCTION	*	28,300.00	0.00	28,300.00	5,716.30	14,846.75	7,736.95
2110	TEACHING - REGULAR SCHOOL	*	25,902,362.00	-514,489.49	25,387,872.51	14,098,119.45	9,019,363.60	2,270,389.46
2138	MUSIC & FINE ARTS	*	71,324.00	6,587.43	77,911.43	47,862.16	27,586.59	2,462.68
2250	PROGRAMS FOR HANDICAPPED CHILDREN	*	16,041,519.00	0.00	16,041,519.00	8,742,418.03	6,527,384.05	771,716.92
2280	OCCUPATIONAL EDUCATION	*	1,193,034.00	40.00	1,193,074.00	571,313.71	620,002.79	1,757.50
2330	COMMUNITY EDUCATION	*	141,500.00	5,740.00	147,240.00	38,451.44	34,372.22	74,416.34
2610	SCHOOL LIBRARY AND AUDIOVISUAL	*	556,135.00	64.47	556,199.47	369,800.34	181,632.68	4,766.45
2620	EDUCATIONAL TELEVISION	*	18,967.00	0.00	18,967.00	2,425.16	16,541.84	0.00
2630	COMPUTER ASSISTED INSTRUCTION	*	495,229.00	137,463.10	632,692.10	300,599.26	71,088.43	261,004.41
2805	ATTENDANCE - REGULAR SCHOOL	*	79,386.00	-20,112.00	59,274.00	42,448.44	12,589.50	4,236.06
2810	GUIDANCE - REGULAR SCHOOL	*	1,388,473.00	95,351.72	1,483,824.72	949,435.87	535,209.06	-820.21

ROCKY POINT UFSD

Appropriation Status Summary Report By Function From 7/1/2023 To 3/31/2024



Account	Description	Budget	Adjustments	Adj. Budget	Expensed	Encumbered	Available
2815	HEALTH SERVICES - REGULAR SCHOOL *	543,046.00	75,703.02	618,749.02	355,717.89	187,219.06	75,812.07
2820	PSYCHOLOGICAL SERVICES - REGULAR SCHOOL *	359,684.00	0.00	359,684.00	199,116.43	160,399.57	168.00
2825	SOCIAL WORK SERVICES - REGULAR SCHOOL *	369,109.00	0.00	369,109.00	211,804.59	156,590.41	714.00
2850	CO-CURRICULAR ACTIVITIES - REG. SCHOOL *	442,620.00	-4,137.80	438,482.20	245,855.41	5,201.26	187,425.53
2855	INTERSCHOLASTIC ATHLETICS - REG. SCHOOL *	925,930.00	61,314.80	987,244.80	739,873.71	89,275.30	158,095.79
5510	DISTRICT TRANSPORTATION SERVICES *	44,078.00	100.00	44,178.00	32,463.13	11,705.87	9.00
5540	CONTRACT TRANSPORTATION *	6,193,069.00	3,600.00	6,196,669.00	3,193,481.52	2,986,709.64	16,477.84
9010	NYS EMPLOYEES RETIREMENT *	1,135,038.00	0.00	1,135,038.00	721,039.19	0.00	413,998.81
9020	NYS TEACHERS RETIREMENT *	3,648,084.00	0.00	3,648,084.00	-20,979.00	0.00	3,669,063.00
9030	SOCIAL SECURITY *	3,390,480.00	0.00	3,390,480.00	1,945,481.94	0.00	1,444,998.06
9040	WORKERS' COMPENSATION *	400,000.00	0.00	400,000.00	202,632.61	180,021.15	17,346.24
9045	LIFE INSURANCE *	50,000.00	0.00	50,000.00	24,215.07	14,238.24	11,546.69
9050	UNEMPLOYMENT INSURANCE *	50,000.00	0.00	50,000.00	4,499.17	44,800.83	700.00
9060	HEALTH INSURANCE *	14,028,208.00	0.00	14,028,208.00	10,151,150.39	2,895,196.02	981,861.59
9760	TAX ANTICIPATION NOTES *	120,000.00	0.00	120,000.00	0.00	0.00	120,000.00
9785	Installment Purchase Debt- State Aided Computer *	313,241.00	0.00	313,241.00	146,860.61	0.00	166,380.39
9901	TRANSFER TO SPECIAL AID *	2,053,681.00	0.00	2,053,681.00	161,340.00	0.00	1,892,341.00
9950	CAPITAL IMPROVEMENTS *	390,880.00	0.00	390,880.00	390,880.00	0.00	0.00
Fund ATotals:		93,985,727.00	865,622.12	94,851,349.12	53,590,453.74	27,978,166.34	13,282,729.04
Grand Totals:		93,985,727.00	865,622.12	94,851,349.12	53,590,453.74	27,978,166.34	13,282,729.04

**ROCKY POINT UNION FREE SCHOOL DISTRICT
FOR THE MONTH ENDED MARCH 2024**

CAFETERIA FUND

ROCKY POINT UFSD

Trial Balance Report From 7/1/2023 - 3/31/2024



Account	Description	Debits	Credits
C 207	CAPITAL ONE CHECKING	300,126.17	0.00
C 208	CHASE ACH REVENUE	274,082.84	0.00
C 380	ACCOUNTS RECEIVABLE	886.46	0.00
C 391	DUE FROM GENERAL FUND	111,090.45	0.00
C 445	SUPPLY INVENTORY	11,411.81	0.00
C 446	GOVT FOOD INVENTORY	6,555.02	0.00
C 447	PURCHASED FOOD INVENTORY	18,404.04	0.00
C 510	ESTIMATED REVENUES	1,322,000.00	0.00
C 521	ENCUMBRANCES	311,382.58	0.00
C 522	EXPENDITURES	1,023,883.67	0.00
C 599	APPROPRIATED FUND BALANCE	181,142.22	0.00
C 600	ACCOUNTS PAYABLE	0.00	915.50
C 630	DUE TO GENERAL FUND	0.00	39,510.30
C 630A	DUE TO GENERAL FUND PAYROLL	0.00	57,650.72
C 631	DUE TO OTHER GOVT.	0.00	0.09
C 691	DEFERRED REVENUE	0.00	28,981.17
C 821	RESERVE FOR ENCUMBRANCES	0.00	311,382.58
C 845	FUND BALANCE RESERVE FOR INVENTORY	0.00	36,370.87
C 909	FUND BALANCE	0.00	587,670.94
C 960	APPROPRIATIONS	0.00	1,503,142.22
C 980	REVENUES	0.00	995,340.87
C Fund Totals:		3,560,965.26	3,560,965.26
Grand Totals:		3,560,965.26	3,560,965.26

ROCKY POINT UFSD

Revenue Status Report By Function From 7/1/2023 To 3/31/2024



Account	Description	Budget	Adjustments	Revised Budget	Revenue Earned	Unearned Revenue
<u>C 1440</u>	SALE OF TYPE A LUNCHES	298,900.00	7,000.00	305,900.00	58,497.25	247,402.75
<u>C 1441</u>	ADULT ALA CARTE	1,200.00	0.00	1,200.00	745.38	454.62
<u>C 1445</u>	OTHER CAFETERIA SALES	373,900.00	11,000.00	384,900.00	262,832.75	122,067.25
<u>C 2401</u>	INTEREST AND EARNINGS	0.00	0.00	0.00	7,983.84	-7,983.84
<u>C 2770</u>	MISCELLANEOUS REVENUES	10,000.00	0.00	10,000.00	2.65	9,997.35
<u>C 3190</u>	GOVERNMENT REIMB-STATE	20,000.00	0.00	20,000.00	264,891.00	-244,891.00
<u>C 4191</u>	GOVERNMENT REIMB-FEDERAL	600,000.00	0.00	600,000.00	400,388.00	199,612.00
	C Totals:	1,304,000.00	18,000.00	1,322,000.00	995,340.87	326,659.13
	Grand Totals:	1,304,000.00	18,000.00	1,322,000.00	995,340.87	326,659.13

Appropriation Status Summary Report By Function From 7/1/2023 To 3/31/2024

Account	Description	Budget	Adjustments	Adj. Budget	Expensed	Encumbered	Available
2860	*	1,340,000.00	103,142.22	1,443,142.22	990,524.91	311,382.58	141,234.73
9030	*	55,000.00	0.00	55,000.00	31,329.32	0.00	23,670.68
9925	*	5,000.00	0.00	5,000.00	2,029.44	0.00	2,970.56
Fund CTotals:		1,400,000.00	103,142.22	1,503,142.22	1,023,883.67	311,382.58	167,875.97
Grand Totals:		1,400,000.00	103,142.22	1,503,142.22	1,023,883.67	311,382.58	167,875.97

**ROCKY POINT UNION FREE SCHOOL DISTRICT
FOR THE MONTH ENDED MARCH 2024**

FEDERAL FUND

ROCKY POINT UFSD

Trial Balance Report From 7/1/2023 - 3/31/2024



Account	Description	Debits	Credits
F 205	CAPITAL ONE CHECKING	302,792.49	0.00
F 391	DUE FROM GENERAL FUND	1,000.00	0.00
F 410	STATE AND FEDERAL AID REC	66,992.71	0.00
F 510	ESTIMATED REVENUES	3,988,116.20	0.00
F 521	ENCUMBRANCES	1,199,753.78	0.00
F 522	EXPENDITURES	2,540,579.77	0.00
F 599	APPROPRIATED FUND BALANCE	0.00	0.09
F 630	DUE TO GENERAL FUND	0.00	800,364.70
F 630A	DUE TO GENERAL FUND PAYROLL	0.00	531,643.65
F 821	RESERVE FOR ENCUMBRANCES	0.00	1,199,753.78
F 960	APPROPRIATIONS	0.00	3,988,116.11
F 980	REVENUES	0.00	1,579,356.62
F Fund Totals:		8,099,234.95	8,099,234.95
Grand Totals:		8,099,234.95	8,099,234.95



Account	Description	Budget	Adjustments	Revised Budget	Revenue Earned	Unearned Revenue
F 3289.EMT.A	Educational Media Technology Association	1,000.00	0.00	1,000.00	1,000.00	0.00
F 3289.HCW.B	HEALTHCARE WORKER BONUS REVENUE 2022 2023	1,000.00	9,000.00	10,000.00	9,688.50	311.50
F 3289.SSH.24	REVENUE-SUMMER HCP 2023 2024	0.00	0.00	0.00	336,637.66	-336,637.66
F 3289.STO.P2.3	STOP ARM REVENUE 2022 2023	19,576.00	0.00	19,576.00	19,576.10	-0.10
F 3289.UPK.24	UPK REVENUE 2023 2024	410,490.00	0.00	410,490.00	205,245.00	205,245.00
F 3289.UPK.24.A	UPK REVENUE 2023 2024 FULL DAY	380,983.00	0.00	380,983.00	54,030.00	326,953.00
F 4126.TLL.23	REVENUE TITLE I	1,755.00	0.00	1,755.00	0.00	1,755.00
F 4126.TLL.24	REVENUE TITLE I	0.00	0.00	0.00	44,112.00	-44,112.00
F 4256.PRE.22.A	REVENUE PRE	0.00	6,216.00	6,216.00	0.00	6,216.00
F 4256.PRE.24	REVENUE PRE	44,549.00	0.00	44,549.00	8,909.00	35,640.00
F 4256.PTB.22.A	REVENUE PTB	165.71	0.00	165.71	0.00	165.71
F 4256.PTB.24	REVENUE PTB	758,321.00	0.00	758,321.00	151,664.00	606,657.00
F 4283.24C.NE.A	CHILD NURTITION EQUIPMENT GRANT	47,100.00	0.00	47,100.00	0.00	47,100.00
F 4286.ARP.A	ARP PLAN ARPA	637,236.83	0.00	637,236.83	220,205.00	417,031.83
F 4286.ARP.S	ARP SED ARPS	1,017,235.63	0.00	1,017,235.63	0.00	1,017,235.63
F 4286.ESS.ER	CRRSA ESSER 2	334,715.87	0.00	334,715.87	334,692.00	23.87
F 4286.GEE.R2	CRRSA GEER 2	176,290.16	0.00	176,290.16	176,237.36	52.80
F 4289.ELL.23	REVENUE ELL	3,925.00	0.00	3,925.00	0.00	3,925.00
F 4289.ELL.24	REVENUE ELL	19,219.00	18,270.00	37,489.00	3,843.00	33,646.00
F 4289.SAE.23	REVENUE SSAE	100.00	0.00	100.00	0.00	100.00
F 4289.SAE.24	REVENUE SSAE	18,963.00	0.00	18,963.00	3,792.00	15,171.00
F 4289.TIL.23	REVENUE TITLE IIA	7,311.00	0.00	7,311.00	1,077.00	6,234.00
F 4289.TIL.24	REVENUE TITLE IIA	43,244.00	31,450.00	74,694.00	8,648.00	66,046.00
F Totals:		3,923,180.20	64,936.00	3,988,116.20	1,579,356.62	2,408,759.58
Grand Totals:		3,923,180.20	64,936.00	3,988,116.20	1,579,356.62	2,408,759.58



Account	Description	Budget	Adjustments	Adj. Budget	Expensed	Encumbered	Available
1620	*	12,143.85	327,846.10	339,989.95	339,920.41	0.00	69.54
1621	*	18,701.00	627.29	19,328.29	15,677.26	3,651.03	0.00
2110	*	2,281,623.29	196,625.01	2,478,248.30	1,323,904.26	914,930.86	239,413.18
2250	*	869,483.71	11,127.00	880,610.71	597,573.38	281,171.89	1,865.44
2630	*	2,972.36	173,321.40	176,293.76	176,237.36	0.00	56.40
2810	*	11,837.11	8,987.00	20,824.11	13,648.50	0.00	7,175.61
2815	*	0.00	3,000.00	3,000.00	3,000.00	0.00	0.00
2825	*	0.99	0.00	0.99	0.00	0.00	0.99
9020	*	20,979.00	0.00	20,979.00	20,979.00	0.00	0.00
9030	*	16,376.00	0.00	16,376.00	17,174.60	0.00	-798.60
9060	*	32,465.00	0.00	32,465.00	32,465.00	0.00	0.00
Fund FTotals:		3,266,582.31	721,533.80	3,988,116.11	2,540,579.77	1,199,753.78	247,782.56
Grand Totals:		3,266,582.31	721,533.80	3,988,116.11	2,540,579.77	1,199,753.78	247,782.56

**ROCKY POINT UNION FREE SCHOOL DISTRICT
FOR THE MONTH ENDED MARCH 2024**

CAPITAL FUND

ROCKY POINT UFSD

Trial Balance Report From 7/1/2023 - 3/31/2024



Account	Description	Debits	Credits
H 205	CAPITAL ONE CHECKING	228,875.33	0.00
H 391	DUE FROM GENERAL FUND	319,858.15	0.00
H 510	ESTIMATED REVENUES	543,083.34	0.00
H 521	ENCUMBRANCES	348,267.94	0.00
H 522	EXPENDITURES	2,436,637.64	0.00
H 599	APPROPRIATED FUND BALANCE	3,160,397.57	0.00
H 821	RESERVE FOR ENCUMBRANCES	0.00	348,267.94
H 909	FUND BALANCE	0.00	2,280,375.64
H 960	APPROPRIATIONS	0.00	3,703,480.91
H 980	REVENUES	0.00	704,995.48
H Fund Totals:		7,037,119.97	7,037,119.97
Grand Totals:		7,037,119.97	7,037,119.97

Revenue Status Report By Function From 7/1/2023 To 3/31/2024

Account	Description	Budget	Adjustments	Revised Budget	Revenue Earned	Unearned Revenue
<u>H 3297</u>	SMART SCHOOLS	0.00	0.00	0.00	314,115.48	-314,115.48
<u>H 5031</u>	TRANFERS GENERAL FUND	0.00	390,880.00	390,880.00	390,880.00	0.00
<u>H 5710</u>	SERIAL BONDS	0.00	152,203.34	152,203.34	0.00	152,203.34
H Totals:		0.00	543,083.34	543,083.34	704,995.48	-161,912.14
Grand Totals:		0.00	543,083.34	543,083.34	704,995.48	-161,912.14



Account	Description	Budget	Adjustments	Adj. Budget	Expensed	Encumbered	Available
1620	*	63,390.45	2,395,477.09	2,458,867.54	2,122,265.10	306,149.44	30,453.00
1625	*	884,957.45	194,632.29	1,079,589.74	149,349.27	42,118.50	888,121.97
9950	*	0.36	165,023.27	165,023.63	165,023.27	0.00	0.36
Fund HTotals:		948,348.26	2,755,132.65	3,703,480.91	2,436,637.64	348,267.94	918,575.33
Grand Totals:		948,348.26	2,755,132.65	3,703,480.91	2,436,637.64	348,267.94	918,575.33

**ROCKY POINT UNION FREE SCHOOL DISTRICT
FOR THE MONTH ENDED MARCH 2024**

SCHOLARSHIP FUND



Account	Description	Debits	Credits
CM 200	Scholarship Cash	48,953.05	0.00
CM 200.1	DUE FROM GENERAL	867.40	0.00
CM 2001	RITA SULLIVAN SCHOLARSHIP	0.00	538.27
CM 2003	K EDWARDS ADMIN SCHOLARSHIP	0.00	1,956.64
CM 2008	FRANCIS RYAN SCHOLARSHIP	0.00	262.48
CM 2009	GENERAL SCHOLARSHIP	0.00	64.87
CM 2010	AL MAIN SCHOLARSHIP	0.00	3,479.35
CM 2011	JOSEPH FALLICA SCHOLARSHIP	0.00	866.19
CM 2012	FJC RUTH SPIEGEL MEMORIAL	0.00	101.46
CM 2016	SOUND BEACH MUSIC SCHOLARSHIP	0.00	0.96
CM 2018	LIVE LIKE SUSIE SCHOLARSHIP	0.00	28,587.02
CM 2020	INTERDIST COUNCIL OF SUP. SR SCHOLARSHIP	0.00	264.95
CM 2021	PETER MADDALENA MEMORIAL SCHOLARSHIP	0.00	8,656.64
CM 2022	JOHN HAGGERTY MEMORIAL SCHOLARSHIP	0.00	3,601.02
CM 2023	TEAM SCHOLARSHIP	0.00	46.68
CM 510	Estimated Revenue	12,500.00	0.00
CM 522	Expenditures	0.00	0.00
CM 599	Appropriated Fund Balance	0.00	12,500.00
CM 980	Revenues	0.00	1,393.92
CM Fund Totals:		62,320.45	62,320.45
Grand Totals:		62,320.45	62,320.45

ROCKY POINT UFSD

Revenue Status Report By Function From 7/1/2023 To 3/31/2024



Account	Description	Budget	Adjustments	Revised Budget	Revenue Earned	Unearned Revenue
<u>CM 2018.001</u>	LIVE LIKE SUSIE	5,000.00	0.00	5,000.00	600.00	4,400.00
<u>CM 2401.000</u>	INTEREST	7,500.00	0.00	7,500.00	793.92	6,706.08
CM Totals:		12,500.00	0.00	12,500.00	1,393.92	11,106.08
Grand Totals:		12,500.00	0.00	12,500.00	1,393.92	11,106.08

**ROCKY POINT UNION FREE SCHOOL DISTRICT
FOR THE MONTH ENDED MARCH 2024**

DEBT SERVICE FUND

ROCKY POINT UFSD

Trial Balance Report From 7/1/2023 - 3/31/2024



Account	Description	Debits	Credits
V 200	CASH	129,152.42	0.00
V 3911	DUE FROM GENERAL	1,922.74	0.00
V 510	ESTIMATED REVENUE	1,992,682.00	0.00
V 522	EXPENDITURES	161,340.63	0.00
V 599	APPROPRIATED FUND BALANCE	0.00	40,000.00
V 630	DUE TO OTHER FUNDS	0.00	3,143.02
V 909	FUND BALANCE, UNRESERVED	0.00	110,233.89
V 960	APPROPRIATIONS	0.00	1,952,682.00
V 980	REVENUES	0.00	179,038.88
V Fund Totals:		2,285,097.79	2,285,097.79
Grand Totals:		2,285,097.79	2,285,097.79

ROCKY POINT UFSD



Revenue Status Report By Function From 7/1/2023 To 3/31/2024

Account	Description	Budget	Adjustments	Revised Budget	Revenue Earned	Unearned Revenue
<u>V 2401</u>	INTEREST EARNINGS	40,000.00	0.00	40,000.00	17,698.88	22,301.12
<u>V 5031</u>	INTERFUND TRANSFERS	1,952,682.00	0.00	1,952,682.00	161,340.00	1,791,342.00
	V Totals:-	1,992,682.00	0.00	1,992,682.00	179,038.88	1,813,643.12
	Grand Totals:	1,992,682.00	0.00	1,992,682.00	179,038.88	1,813,643.12

ROCKY POINT UFSD

Appropriation Status Summary Report By Function From 7/1/2023 To 3/31/2024



Account	Description	Budget	Adjustments	Adj. Budget	Expensed	Encumbered	Available
9711	*	1,952,682.00	0.00	1,952,682.00	161,340.63	0.00	1,791,341.37
	Fund VTotals:	1,952,682.00	0.00	1,952,682.00	161,340.63	0.00	1,791,341.37
	Grand Totals:	1,952,682.00	0.00	1,952,682.00	161,340.63	0.00	1,791,341.37

**ROCKY POINT UNION FREE SCHOOL DISTRICT
FOR THE MONTH ENDED MARCH 2024**

EXTRA CLASS FUND

ROCKY POINT UFSD

Trial Balance Report From 7/1/2023 - 3/31/2024



Account	Description	Debits	Credits
CM3 200	Extraclass Checking		
CM3 291	Due From Other Funds	74,145.35	0.00
CM3 301	LEADERS CLUB	5,049.07	0.00
CM3 302	MATH HONOR SOCIETY	0.00	23.17
CM3 303	VARSITY CLUB	0.00	58.14
CM3 304	SCIENCE CLUB	0.00	385.59
CM3 305	SPACE CLUB	0.00	332.63
CM3 306	STUDENT COUNCIL MS	0.00	343.16
CM3 307	YEARBOOK MS	0.00	5,223.88
CM3 308	BUSINESS CLUB	0.00	15,116.76
CM3 309	MS ROBOTICS CLUB	0.00	165.97
CM3 310	BE A NICER NEIGHBOR CLUB	0.00	155.90
CM3 311	INTERACT COMMUNITY SERVICE CLUB	0.00	2,171.85
CM3 312	SKILLS USA HS COSMOTOLOGY	0.00	3,066.95
CM3 313	GAY STRAIGHT ALLIANCE CLUB	0.00	893.56
CM3 314	HUMAN RIGHTS CLUB	0.00	0.01
CM3 315	S.A.D.D	0.00	181.08
CM3 316	THESPIAN TROUPE #696	0.00	1,304.87
CM3 317	YEARBOOK HS	0.00	1,982.91
CM3 318	STUDENT COUNCIL	0.00	10,325.48
CM3 319	ART CLUB	0.00	15,182.24
CM3 321	JAE STUDENT COUNCIL	0.00	1,439.58
CM3 322	ROBOTICS CLUB HS	0.00	1,130.65
CM3 323	HISTORY HONOR SOCIETY	0.00	514.61
CM3 324	MATH TEAM	0.00	107.82
CM3 325	NATIONAL ENGLISH HONOR SOCIETY	0.00	748.54
CM3 326	TECHNOLOGY/MAKER SPACE CLUB	0.00	0.21
CM3 327	SOUND CHOICE CLUB	0.00	31.88
CM3 510	Estimated Revenue	0.00	482.58
CM3 522	Expenditures	61,850.00	0.00
CM3 599	Appropriated Fund Balance	18,908.45	0.00
CM3 960	Appropriations	0.00	32,850.00
CM3 980	Revenues	0.00	29,000.00
		0.00	36,732.85
CM3 Fund Totals:		159,952.87	159,952.87
Grand Totals:		159,952.87	159,952.87

ROCKY POINT UFSD

Revenue Status Report By Function From 7/1/2023 To 3/31/2024



Account	Description	Budget	Adjustments	Revised Budget	Revenue Earned	Unearned Revenue
<u>CM3 1000.102</u>	MATH HONOR SOCIETY	0.00	0.00	0.00	1,690.00	-1,690.00
<u>CM3 1000.103</u>	VARSITY CLUB	1,500.00	0.00	1,500.00	997.00	503.00
<u>CM3 1000.106</u>	STUDENT COUNCIL MS	9,000.00	0.00	9,000.00	2,244.00	6,756.00
<u>CM3 1000.107</u>	YEARBOOK MS	9,000.00	0.00	9,000.00	7,140.00	1,860.00
<u>CM3 1000.110</u>	BE A NICER NEIGHBOR CLUB	0.00	0.00	0.00	1,913.00	-1,913.00
<u>CM3 1000.112</u>	SKILLS USA HS COSMOTOLOGY	7,500.00	0.00	7,500.00	5,300.00	2,200.00
<u>CM3 1000.114</u>	HUMAN RIGHTS CLUB	350.00	0.00	350.00	107.00	243.00
<u>CM3 1000.117</u>	YEARBOOK HS	12,500.00	0.00	12,500.00	7,695.00	4,805.00
<u>CM3 1000.118</u>	STUDENT COUNCIL	11,000.00	0.00	11,000.00	3,069.92	7,930.08
<u>CM3 1000.125</u>	NATIONAL ENGLISH HONOR SOCIETY	500.00	0.00	500.00	250.00	250.00
<u>CM3 1000.129</u>	FISHING CLUB	7,500.00	0.00	7,500.00	5,346.50	2,153.50
<u>CM3 2401.000</u>	INTEREST	3,000.00	0.00	3,000.00	980.43	2,019.57
CM3 Totals:		61,850.00	0.00	61,850.00	36,732.85	25,117.15
Grand Totals:		61,850.00	0.00	61,850.00	36,732.85	25,117.15

ROCKY POINT UFSD

Appropriation Status Summary Report By Function From 7/1/2023 To 3/31/2024



Account	Description	Budget	Adjustments	Adj. Budget	Expensed	Encumbered	Available
3000	*	29,000.00	0.00	29,000.00	18,908.45	0.00	10,091.55
	Fund CM3Totals:	29,000.00	0.00	29,000.00	18,908.45	0.00	10,091.55
	Grand Totals:	29,000.00	0.00	29,000.00	18,908.45	0.00	10,091.55



John F. Dennehy, Jr.
Certified Public Accountant, P.C.

April 24, 2024

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

*Re: Internal Claims Audit Report for the period
April 1, 2024 through April 30, 2024*

Board of Education:

I have completed my internal claims auditing services for the Rocky Point School District covering the period April 1, 2024 through April 30, 2024. The services I performed, as outlined within my proposal, include reviewing all claims against the District. The purpose of this report is to update the Board of Education on work performed to date, my findings, and recommendations.

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

Internal Claims Audit Services

Exhibits

INTERNAL CLAIMS AUDIT SERVICES

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

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

Board of Education
Rocky Point School District
April 24, 2024

Page 2

*Re: Internal Claims Audit Report for the time period of
April 1, 2024 through April 30, 2024*

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

Over the time period of April 1, 2024 through April 30, 2024 I have audited 276 claims against the District in the amount of \$5,127,938.82. (See attached Exhibit I) I made inquiries and/ or observations into 51 claims in the amount of \$106,099.42. I have summarized the inquiries and/or observations as well as the resolutions within Exhibit II. It should be noted that currently, there are 0 outstanding inquiries in regards to the audit of the claims made against the District for the period of April 1, 2024 through April 30, 2024. I have summarized all voided checks and notable exceptions in Exhibit III.

I trust that the foregoing comments are clear. If you have any questions or you would like to discuss this matter further, please contact me at 631-928-5406.

Very truly yours,

John F. Dennehy, Jr.
Certified Public Accountant

Rocky Point School District
Internal Claims Audit By Fund

Exhibit I

Warrant Date	Audit Date	Warrant #	Fund	# of Checks	\$ Value of Checks	# of Inquiries	\$ Value of Inquiries	# of Resolved Inquiries	# of Outstanding Inquiries	Check Sequence
4/5/2024	4/3/2024	103	A	25	\$636,690.53	-	\$0.00	-	-	13743-13749, 5117310-5117327
4/3/2024	4/3/2024	104	A	29	\$1,112,984.54	8	\$22,347.34	8	-	122378-122405
4/3/2024	4/3/2024	105	A	3	\$15,843.32	-	\$0.00	-	-	13740-13742
4/10/2024	4/10/2024	106	A	62	\$1,497,901.28	12	\$19,185.86	12	-	122406-122467
4/10/2024	4/10/2024	107	A	1	\$345.80	-	\$0.00	-	-	13750
4/17/2024	4/17/2024	108	A	80	\$718,410.78	27	\$46,578.17	27	-	122468-122546
4/19/2024	4/17/2024	110	A	26	\$706,279.84	-	\$0.00	-	-	13751-13758, 5117328-5117345
4/3/2024	4/3/2024	30	C	13	\$17,104.82	-	\$0.00	-	-	13403-13415
4/10/2024	4/10/2024	31	C	16	\$32,790.76	2	\$17,172.29	2	-	13416-13431
4/3/2024	4/3/2024	17	CM3	1	\$51.19	-	\$0.00	-	-	11522
4/9/2024	4/10/2024	18	CM3	4	\$1,892.33	-	\$0.00	-	-	11523-11526
4/16/2024	4/17/2024	19	CM3	1	\$235.25	-	\$0.00	-	-	11527
4/3/2024	4/3/2024	25	F	3	\$34,905.09	-	\$0.00	-	-	4955-4957
4/10/2024	4/10/2024	26	F	5	\$81,479.62	-	\$0.00	-	-	4958-4962
4/17/2024	4/17/2024	27	F	3	\$30,501.21	-	\$0.00	-	-	4963-4965
4/3/2024	4/3/2024	18	H	1	\$115,449.20	-	\$0.00	-	-	1203
4/10/2024	4/10/2024	19	H	1	\$78,948.98	-	\$0.00	-	-	1204
4/17/2024	4/17/2024	20	H	2	\$46,124.28	2	\$815.76	2	-	1205-1206
TOTAL				276	\$ 5,127,988.82	51	\$ 106,099.42	51	-	

Legend:

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

John F. Dennehy, Jr.
Certified Public Accountant, PC

Rocky Point School District
Claims Audit - Analysis by Number of Inquiries & Dollar Value
Summary of Inquiries / Resolutions and Percentage of Total Claims & Dollar Value of Claims
Exhibit II

2023 / 2024 YTD

Analysis by Dollar Value

Reason For Inquiry	Resolution	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24
All invoices not reflected on check	Pay unpaid invoice(s) next warrant	0.00%	0.00%	0.00%	0.00%		
Check amount not equal to invoices	Difference < \$5; immaterial, claim paid	141.03 0.00%	0.00%	0.00%	0.00%		#DIV/0!
Check amount not equal to invoices	Overpaid recurring vendor by less than \$100; credit will be taken off on next payment to vendor	0.00%	0.00%	0.00%	16,377.89 0.32%		#DIV/0!
Check amount not equal to invoices	Void & reissue	19,002.97 0.35%	0.00%	0.00%	0.00%		#DIV/0!
Check issued prior to service	Void & reissue at time of service	0.00%	0.00%	0.00%	0.00%		#DIV/0!
Credit not taken	Recurring vendor; credit memo pulled from packet to apply to next invoice	0.00%	0.00%	0.00%	0.00%		#DIV/0!
Current year expense paid prior year P.O.	P.O. Funds carried over	46,325.58 0.84%	0.00%	11,800.00 0.27%	0.00%		#DIV/0!
Duplicate payment	Check void by AP	0.00%	0.00%	0.00%	0.00%		#DIV/0!
Incorrect vendor name	Void & reissue	0.00%	0.00%	0.00%	0.00%		#DIV/0!
Insufficient supporting backup	Hold for missing information	0.00%	0.00%	0.00%	0.00%		#DIV/0!
Insufficient supporting backup	Backup Provided	585.00 0.01%	0.00%	0.00%	0.00%		#DIV/0!
Insufficient supporting backup	Void check	0.00%	0.00%	0.00%	0.00%		#DIV/0!
Invoice date precedes PO date	Noted by Business Office	99,916.60 1.83%	83,444.93 1.43%	29,527.60 0.67%	15,273.41 0.30%		#DIV/0!
Invoice over 90 days outstanding/undated	Verified no duplicate payment	44,382.76 0.81%	114,769.85 1.93%	17,181.63 0.38%	27,623.46 0.54%		#DIV/0!
Invoices not listed separately on check	Void and reissue with all invoices itemized separately	0.00%	0.00%	0.00%	0.00%		#DIV/0!
Invoice previously stamped by claims auditor	Confirmed original check void	3,398.40 0.05%	3,769.32 0.05%	379.35 0.01%	2,450.00 0.04%		#DIV/0!
Missing administrator approval endorsement	Received proper authorization	0.00%	0.00%	0.00%	0.00%		#DIV/0!
Missing receiving signature on invoice or PO	Verified receipt of goods/services	0.00%	0.00%	0.00%	0.00%		#DIV/0!
No Purchase Order encumbered	Void & reissue after P.O. encumbered	0.00%	0.00%	0.00%	0.00%		#DIV/0!
Not an original invoice	Copy, fax or statement accepted	51,513.75 0.94%	19,563.69 0.33%	31,347.50 0.70%	2,733.95 0.05%		#DIV/0!
Paid sales tax	Void and reissue	0.00%	0.00%	0.00%	0.00%		#DIV/0!
PO insufficient funds	PO funds increased post invoice/paid direct from budget code	51,604.32 0.94%	55,821.77 0.93%	65,849.20 1.51%	41,556.46 0.81%		#DIV/0!
Prior year invoice paid current year funds	Noted by Business Office	774.87 0.01%	214.00 0.00%	0.00%	74.25 0.00%		#DIV/0!
Pre-dated Invoice	Hold until service date	0.00%	0.00%	1,075.00 0.02%	0.00%		#DIV/0!
Separation of Duties	Same individual signed P.O. and authorized payment; additional admin approval provided	0.00%	0.00%	0.00%	0.00%		#DIV/0!
Prepaid Invoice - Improper Procedure	Vendor requires prepayment; advised in future to select a different vendor	0.00%	0.00%	0.00%	0.00%		#DIV/0!
Total Value (\$) of Inquiries		316,745.98 5.75%	277,576.06 4.75%	167,060.18 2.85%	106,099.42 1.87%		
Total Claims Audited		5,470,694.14 100.00%	5,846,915.40 100.00%	4,368,520.71 100.00%	5,127,938.82 100.00%		
Total Outstanding Inquiries		0.00%	0.00%	0.00%	0.00%		#DIV/0!

**Rocky Point School District
Internal Claim Audit
Notable Exceptions
Exhibit III**

Voided Checks - April 2024

Fund	Ck #	Amount \$	Vendor	Warrant #	Warrant Date	Reason For Inquiry	Resolution
None		-					
Total	0 Voids	\$	-				

Other Notable Exceptions - April 2024

Fund	Ck #	Amount \$	Vendor	Warrant #	Reason For Inquiry	Resolution
None		-				
Total	0 Inquiries	\$	-			

**John F. Denny, Jr.
Certified Public Accountant, PC**

**Rocky Point School District
Internal Claims Audit
Payroll Audit
Exhibit IV**

Audited Payroll Checks - April 2024

Fund	Ck #	Amount \$	Employee	Payroll Date	Exceptions
PR	340969	2,553.35	Ritchie, Carlyle	4/5/2024	None
PR	341437	1,772.49	Mitchko, Nicholas E.	4/5/2024	None
PR	341306	2,859.18	Camarda, Joseph	4/5/2024	None
PR	341341	2,248.04	O'Connell, Catherine	4/5/2024	None
PR	341244	3,177.34	Lawson, Jacqueline T.	4/5/2024	None
		12,610.40			

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

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

**John F. Dennehy, Jr.
Certified Public Accountant, PC**

Interoffice Memorandum

TO: *Dr. Scott O'Brien, Ed.D*

FROM: *Kristen White, Executive Director for Pupil Personnel Services*

DATE: *May 21, 2024*

RE: *Board Action Sheets*

Below please find the schedule of Committee on Special Education meetings for approval at the May 21, 2024 Board of Education meeting:

SCHEDULE- A 5/21/24		
Year	Date	Location
2023-2024	March 26, 2024- May 3, 2024	CSE & SCSE meetings conducted for students attending in-district and out of district placements
2023-2024	March 26, 2024- May 3, 2024	CSE & SCSE Amendments without Meetings

BOE ACTION Summary DATE? DECISION?

CMA BOE Date	CR Doc Committee Responsible	CMA Reason	Decision/Status	CMA Date	CR Expected Grade	CR Next Recommended School (>2010-11 SY)	Program	Program Start	Program End	Program Ratio	Program Frequency	Program Period	Program Duration	Program Location	Related Service	RS Start	RS End	RS Ratio	RS Frequency	RS Period	RS Duration
05/21/2024	CSE	Annual Review	Classified	03/30/2023	08		Special Class	09/05/2024	06/27/2025	8:1:1	5	Weekly		330 Across All Educational Settings	Speech/Language Therapy	09/05/2024	06/27/2025	Individual	2	Weekly	30
		Annual Review	Classified		08		Special Class	09/05/2024	06/27/2025	8:1:1	5	Weekly		330 Across All Educational Settings	Parent Counseling and Training	09/05/2024	06/27/2025	Individual	2	Monthly	60
		Annual Review	Classified		08		Special Class	09/05/2024	06/27/2025	8:1:1	5	Weekly		330 Across All Educational Settings	Speech/Language Therapy	09/05/2024	06/27/2025	Small Group	1	Weekly	30
		Annual Review	Classified	01/18/2024	Ungraded		Special Class	09/04/2024	06/13/2025	12:1	4	Daily		40 Special Location	Physical Therapy	09/12/2024	06/13/2025	Individual	2	Weekly	30
		Annual Review	Classified		Ungraded		Special Class	09/04/2024	06/13/2025	12:1	4	Daily		40 Special Location	Occupational Therapy	09/12/2024	06/13/2025	Individual	2	Weekly	30
		Annual Review	Classified		Ungraded		Special Class	09/04/2024	06/13/2025	12:1	4	Daily		40 Special Location	Speech/Language Therapy	09/12/2024	06/13/2025	Small Group	2	Weekly	30
		Annual Review	Classified		Ungraded		Special Class	09/04/2024	06/13/2025	12:1	4	Daily		40 Special Location	Orientation and Mobility Services	09/12/2024	06/13/2025	Individual	1	Weekly	30
		Annual Review	Classified		Ungraded		Special Class	09/04/2024	06/13/2025	12:1	4	Daily		40 Special Location	Counseling	09/12/2024	06/13/2025	Small Group	2	Monthly	30
		Annual Review	Classified		Ungraded		Special Class	09/04/2024	06/13/2025	12:1	4	Daily		40 Special Location	Counseling	09/12/2024	06/13/2025	Individual	2	Monthly	30
		Annual Review	Classified		Ungraded		Special Class	09/04/2024	06/13/2025	12:1	4	Daily		40 Special Location	School Health Services	09/12/2024	06/13/2025	Individual	5	Weekly	30
		Annual Review	Classified		Ungraded		Adapted Physical Education	09/04/2024	06/13/2025		10	Every 2 weeks		40 Gym	Physical Therapy	09/12/2024	06/13/2025	Individual	2	Weekly	30
		Annual Review	Classified		Ungraded		Adapted Physical Education	09/04/2024	06/13/2025		10	Every 2 weeks		40 Gym	Occupational Therapy	09/12/2024	06/13/2025	Individual	2	Weekly	30
		Annual Review	Classified		Ungraded		Adapted Physical Education	09/04/2024	06/13/2025		10	Every 2 weeks		40 Gym	Speech/Language Therapy	09/12/2024	06/13/2025	Small Group	2	Weekly	30
		Annual Review	Classified		Ungraded		Adapted Physical Education	09/04/2024	06/13/2025		10	Every 2 weeks		40 Gym	Orientation and Mobility Services	09/12/2024	06/13/2025	Individual	1	Weekly	30
		Annual Review	Classified		Ungraded		Adapted Physical Education	09/04/2024	06/13/2025		10	Every 2 weeks		40 Gym	Counseling	09/12/2024	06/13/2025	Small Group	2	Monthly	30
		Annual Review	Classified		Ungraded		Adapted Physical Education	09/04/2024	06/13/2025		10	Every 2 weeks		40 Gym	Counseling	09/12/2024	06/13/2025	Individual	2	Monthly	30
		Annual Review	Classified		Ungraded		Adapted Physical Education	09/04/2024	06/13/2025		10	Every 2 weeks		40 Gym	School Health Services	09/12/2024	06/13/2025	Individual	5	Weekly	30
		Annual Review	Classified		Ungraded		Special Class - English	09/04/2024	06/13/2025	12:1+1	5	Weekly		40 ELA Class	Physical Therapy	09/12/2024	06/13/2025	Individual	2	Weekly	30
		Annual Review	Classified		Ungraded		Special Class - English	09/04/2024	06/13/2025	12:1+1	5	Weekly		40 ELA Class	Occupational Therapy	09/12/2024	06/13/2025	Individual	2	Weekly	30
		Annual Review	Classified		Ungraded		Special Class - English	09/04/2024	06/13/2025	12:1+1	5	Weekly		40 ELA Class	Speech/Language Therapy	09/12/2024	06/13/2025	Small Group	2	Weekly	30
		Annual Review	Classified		Ungraded		Special Class - English	09/04/2024	06/13/2025	12:1+1	5	Weekly		40 ELA Class	Orientation and Mobility Services	09/12/2024	06/13/2025	Individual	1	Weekly	30
		Annual Review	Classified		Ungraded		Special Class - English	09/04/2024	06/13/2025	12:1+1	5	Weekly		40 ELA Class	Counseling	09/12/2024	06/13/2025	Small Group	2	Monthly	30
		Annual Review	Classified		Ungraded		Special Class - English	09/04/2024	06/13/2025	12:1+1	5	Weekly		40 ELA Class	Counseling	09/12/2024	06/13/2025	Individual	2	Monthly	30
		Annual Review	Classified		Ungraded		Special Class - English	09/04/2024	06/13/2025	12:1+1	5	Weekly		40 ELA Class	School Health Services	09/12/2024	06/13/2025	Individual	5	Weekly	30
		Annual Review	Classified		Ungraded		Special Class - Math	09/04/2024	06/13/2025	12:1+1	5	Weekly		40 Math Class	Physical Therapy	09/12/2024	06/13/2025	Individual	2	Weekly	30
		Annual Review	Classified		Ungraded		Special Class - Math	09/04/2024	06/13/2025	12:1+1	5	Weekly		40 Math Class	Occupational Therapy	09/12/2024	06/13/2025	Individual	2	Weekly	30
		Annual Review	Classified		Ungraded		Special Class - Math	09/04/2024	06/13/2025	12:1+1	5	Weekly		40 Math Class	Speech/Language Therapy	09/12/2024	06/13/2025	Small Group	2	Weekly	30

Annual Review	Classified	Ungraded	Special Class - Math	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	Orientation and Mobility Services	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	Ungraded	Special Class - Math	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025 Small Group	2 Monthly	30
Annual Review	Classified	Ungraded	Special Class - Math	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025 Individual	2 Monthly	30
Annual Review	Classified	Ungraded	Special Class - Math	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	School Health Services	09/12/2024 06/13/2025 Individual	5 Weekly	30
Annual Review	Classified	Ungraded	Special Class - Reading	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Reading Class	Physical Therapy	09/12/2024 06/13/2025 Individual	2 Weekly	30
Annual Review	Classified	Ungraded	Special Class - Reading	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Reading Class	Occupational Therapy	09/12/2024 06/13/2025 Individual	2 Weekly	30
Annual Review	Classified	Ungraded	Special Class - Reading	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Reading Class	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	2 Weekly	30
Annual Review	Classified	Ungraded	Special Class - Reading	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Reading Class	Orientation and Mobility Services	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	Ungraded	Special Class - Reading	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Reading Class	Counseling	09/12/2024 06/13/2025 Small Group	2 Monthly	30
Annual Review	Classified	Ungraded	Special Class - Reading	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Reading Class	Counseling	09/12/2024 06/13/2025 Individual	2 Monthly	30
Annual Review	Classified	Ungraded	Special Class - Reading	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Reading Class	School Health Services	09/12/2024 06/13/2025 Individual	5 Weekly	30
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class	Counseling	09/12/2024 06/13/2025 Individual	2 Monthly	30
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025 Individual	2 Monthly	30
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025 Individual	2 Monthly	30
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025 Individual	2 Monthly	30
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Math Class	Counseling	09/12/2024 06/13/2025 Individual	2 Monthly	30
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class	Counseling	09/12/2024 06/13/2025 Individual	2 Monthly	30
Annual Review	Classified	10	Resource Room Program	09/04/2024 06/13/2025 5:1	5 Weekly	40 Resource Room	Counseling	09/12/2024 06/13/2025 Individual	2 Monthly	30
Annual Review	Classified	Ungraded	Special Class - Math	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	2 Monthly	30
Annual Review	Classified	Ungraded	Special Class - Math	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	Occupational Therapy	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	Ungraded	Special Class - Math	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	Physical Therapy	09/12/2024 06/13/2025 Individual	1 Monthly	30
Annual Review	Classified	Ungraded	Special Class - Math	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	2 Weekly	30
Annual Review	Classified	Ungraded	Special Class - Math	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	Itinerant Vision Teacher	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	Ungraded	Special Class - Math	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	Orientation and Mobility Services	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	Ungraded	Special Class	09/04/2024 06/13/2025 12:1	4 Daily	40 Separate	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	2 Monthly	30
Annual Review	Classified	Ungraded	Special Class	09/04/2024 06/13/2025 12:1	4 Daily	40 Separate	Occupational Therapy	09/12/2024 06/13/2025 Small Group	1 Weekly	30

Annual Review	Classified	Ungraded	Special Class	09/04/2024 06/13/2025 12:1	4 Daily	40 Separate	Physical Therapy	09/12/2024 06/13/2025	Individual	1 Monthly	30
Annual Review	Classified	Ungraded	Special Class	09/04/2024 06/13/2025 12:1	4 Daily	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	Ungraded	Special Class	09/04/2024 06/13/2025 12:1	4 Daily	40 Separate	Itinerant Vision Teacher	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	Ungraded	Special Class	09/04/2024 06/13/2025 12:1	4 Daily	40 Separate	Orientation and Mobility Services	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	Ungraded	Special Class - Math	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	Ungraded	Special Class - Math	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	Ungraded	Special Class - Math	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	Counseling-Social Skills Counseling	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	Ungraded	Special Class - Math	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	Ungraded	Special Class - Math	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	Ungraded	Special Class	09/04/2024 06/13/2025 12:1	4 Daily	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	Ungraded	Special Class	09/04/2024 06/13/2025 12:1	4 Daily	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	Ungraded	Special Class	09/04/2024 06/13/2025 12:1	4 Daily	40 Separate	Counseling-Social Skills Counseling	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	Ungraded	Special Class	09/04/2024 06/13/2025 12:1	4 Daily	40 Separate	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	Ungraded	Special Class	09/04/2024 06/13/2025 12:1	4 Daily	40 Separate	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	10	Special Class - Reading	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 English / Language Arts Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	10	Special Class - English	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 English / Language Arts Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	10	Special Class - Math	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	10	Special Class - Social Studies	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Social Studies Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	10	Special Class - Science	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	10	Special Class	09/04/2024 06/13/2025 12:1+1	5 Every 2 weeks	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	01/31/2024 04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	80 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	80 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	80 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	80 Classroom	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Parent Counseling and	09/12/2024 06/13/2025	Small Group	4 Yearly	60

Annual Review	Classified	04	teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	training Occupational Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	04	Resource Room Program 09/04/2024 06/20/2025 S:1	5 Weekly	40 Separate					
Annual Review	Classified	04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	80 Classroom					
Annual Review	Classified	04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom					
Reevaluation/Annual Review	Classified	05	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	02/06/2024 04	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	04	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	04	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	04	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	04	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	04	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Physical Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Annual Review	Classified	04	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	04	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	5 Weekly	5
Annual Review	Classified	02/07/2024 06	Special Class - Math 09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	06	Special Class - Math 09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	06	Special Class - Science 09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	06	Special Class - Science 09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	06	Special Class 09/04/2024 06/13/2025 15:1+1	15 Weekly	40 Humanities Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	06	Special Class 09/04/2024 06/13/2025 15:1+1	15 Weekly	40 Humanities Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	06	Co-Integrated 09/04/2024 06/13/2025	25 Every 2 weeks	40 Humanities Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30

Annual Review	Classified	06	teaching Services Integrated 09/04/2024 06/13/2025	25 Every 2 weeks	40 Humanities Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	06	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	06	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	06	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	06	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	02/08/2024 04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	02/09/2024 06	Co-teaching Services Integrated 09/05/2024 06/27/2025	25 Every 2 weeks	40 Humanities Class	Occupational Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	06	Co-teaching Services Integrated 09/05/2024 06/27/2025	25 Every 2 weeks	40 Humanities Class	Physical Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	06	Co-teaching Services Integrated 09/05/2024 06/27/2025	25 Every 2 weeks	40 Humanities Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	5 Weekly	5
Annual Review	Classified	06	Co-teaching Services Integrated 09/05/2024 06/27/2025	25 Every 2 weeks	40 Humanities Class	Behavior Intervention Services	09/12/2024 06/13/2025	Individual	2 Monthly	30
Annual Review	Classified	06	Co-teaching Services Integrated 09/05/2024 06/27/2025	25 Every 2 weeks	40 Humanities Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	06	Co-teaching Services Integrated 09/05/2024 06/27/2025	5 Weekly	40 Math Class	Occupational Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	06	Co-teaching Services Integrated 09/05/2024 06/27/2025	5 Weekly	40 Math Class	Physical Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	06	Co-teaching Services Integrated 09/05/2024 06/27/2025	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	5 Weekly	5
Annual Review	Classified	06	Co-teaching Services Integrated 09/05/2024 06/27/2025	5 Weekly	40 Math Class	Behavior Intervention Services	09/12/2024 06/13/2025	Individual	2 Monthly	30
Annual Review	Classified	06	Co-teaching Services Integrated 09/05/2024 06/27/2025	5 Weekly	40 Math Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	06	Co-teaching Services Integrated 09/05/2024 06/27/2025	5 Weekly	40 Science Class	Occupational Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	06	Co-teaching Services Integrated 09/05/2024 06/27/2025	5 Weekly	40 Science Class	Physical Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	06	Co-teaching Services Integrated 09/05/2024 06/27/2025	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	5 Weekly	5
Annual Review	Classified	06	Co-teaching Services Integrated 09/05/2024 06/27/2025	5 Weekly	40 Science Class	Behavior Intervention Services	09/12/2024 06/13/2025	Individual	2 Monthly	30
Annual Review	Classified	06	Co-teaching Services Integrated 09/05/2024 06/27/2025	5 Weekly	40 Science Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60

Annual Review	Classified	04	teaching Services	09/04/2024 06/20/2025 5:1	5 Weekly	40 Classroom	Learning	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	04	Resource Room Program	09/04/2024 06/20/2025 5:1	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group		2 Weekly	30
Annual Review	Classified	04	Resource Room Program	09/04/2024 06/20/2025 5:1	5 Weekly	40 Classroom	Counseling	09/12/2024 06/13/2025	Individual		1 Weekly	30
Annual Review	Classified	04	Resource Room Program	09/04/2024 06/20/2025 5:1	5 Weekly	40 Resource Room						
Reevaluation/Annual Review	Classified	02/12/2024 06	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group		2 Weekly	30
Reevaluation/Annual Review	Classified	06	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group		2 Weekly	30
Reevaluation/Annual Review	Classified	06	Special Class	09/04/2024 06/13/2025 15:1	15 Weekly	40 Humanities Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group		2 Weekly	30
Annual Review	Classified	06	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual		1 Weekly	30
Annual Review	Classified	06	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group		1 Weekly	30
Annual Review	Classified	06	Special Class	09/04/2024 06/13/2025 15:1	15 Weekly	40 Humanities Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual		1 Weekly	30
Annual Review	Classified	06	Special Class	09/04/2024 06/13/2025 15:1	15 Weekly	40 Humanities Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group		1 Weekly	30
Annual Review	Classified	06	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual		1 Weekly	30
Annual Review	Classified	06	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group		1 Weekly	30
Reevaluation/Annual Review	Classified	06	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Every 2 weeks	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual		1 Weekly	30
Reevaluation/Annual Review	Classified	06	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Every 2 weeks	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group		1 Weekly	30
Reevaluation/Annual Review	Classified	06	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual		1 Weekly	30
Reevaluation/Annual Review	Classified	06	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group		1 Weekly	30
Reevaluation/Annual Review	Classified	06	Special Class	09/04/2024 06/13/2025 15:1	15 Weekly	40 Humanities Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual		1 Weekly	30
Reevaluation/Annual Review	Classified	06	Special Class	09/04/2024 06/13/2025 15:1	15 Weekly	40 Humanities Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group		1 Weekly	30
Annual Review	Classified	02/13/2024 05	Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group		3 Weekly	30
Annual Review	Classified	05	Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group		1 Weekly	30
Reevaluation/Annual Review	Classified	02/15/2024 12	Special Class	09/04/2024 06/27/2025 8:1+1	5 Weekly	360 Across School Setting	Psychological Counseling Services	09/04/2024 06/27/2025	Small Group		1 Weekly	45
Reevaluation/Annual Review	Classified	02/16/2024 04	Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Physical Therapy	09/12/2024 06/13/2025	Individual		2 Weekly	30
Reevaluation/Annual Review	Classified	04	Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group		4 Yearly	60
Reevaluation/Annual Review	Classified	04	Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group		2 Weekly	30
Reevaluation/Annual Review	Classified	04	Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Individual		2 Weekly	30
Reevaluation/Annual Review	Classified	04	Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group		1 Weekly	30
Reevaluation/Annual Review	Classified	04	Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Behavior Intervention Services	09/12/2024 06/13/2025	Individual		1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Special Class	09/04/2024 06/27/2025 8:1:1	5 Weekly	330 Classroom	Speech/Language Therapy	09/04/2024 06/27/2025	Individual		3 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Special Class	09/04/2024 06/27/2025 8:1:1	5 Weekly	330 Classroom	Occupational Therapy	09/04/2024 06/27/2025	Individual		3 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Special Class	09/04/2024 06/27/2025 8:1:1	5 Weekly	330 Classroom	Physical Therapy	09/04/2024 06/27/2025	Individual		3 Weekly	30

Annual Review	Classified	02/27/2024 04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	80 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	80 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	80 Classroom	Physical Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	80 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	5 Weekly	5
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Physical Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	5 Weekly	5
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Physical Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	5 Weekly	5
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Physical Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	04	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	5 Weekly	5
Reevaluation/Annual Review	Classified	10	Special Class - English	09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation/Annual Review	Classified	10	Special Class - English	09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation/Annual Review	Classified	10	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation/Annual Review	Classified	10	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation/Annual Review	Classified	10	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation/Annual Review	Classified	10	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30

Reevaluation/Annual Classified Review		10	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Classified Review		10	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	02/29/2024 11	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English / Language Arts Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	11	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English / Language Arts Class	Physical Therapy	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	11	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	11	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Physical Therapy	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Classified Review		05	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	80 Math Class	Counseling	09/12/2024 06/13/2025 Individual	2 Monthly	30
Reevaluation/Annual Classified Review		05	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	80 Math Class	Occupational Therapy	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Reevaluation/Annual Classified Review		05	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	80 Math Class	Physical Therapy	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Classified Review		05	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	80 Math Class	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Reevaluation/Annual Classified Review		05	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Counseling	09/12/2024 06/13/2025 Individual	2 Monthly	30
Reevaluation/Annual Classified Review		05	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Reevaluation/Annual Classified Review		05	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Physical Therapy	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Classified Review		05	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Reevaluation/Annual Classified Review		05	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Counseling	09/12/2024 06/13/2025 Individual	2 Monthly	30
Reevaluation/Annual Classified Review		05	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Reevaluation/Annual Classified Review		05	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Physical Therapy	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Classified Review		05	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Reevaluation/Annual Classified Review		05	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Counseling	09/12/2024 06/13/2025 Individual	2 Monthly	30
Reevaluation/Annual Classified Review		05	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Reevaluation/Annual Classified Review		05	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Physical Therapy	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Classified Review		05	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30

Review			Co-teaching Services			Skills	Group		
Annual Review	Classified	05	Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language 09/12/2024 06/13/2025	Individual Therapy	1 Weekly	30
Annual Review	Classified	05	Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language 09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	05	Integrated 09/04/2024 06/20/2025	5 Weekly	80 Classroom	Speech/Language 09/12/2024 06/13/2025	Individual Therapy	1 Weekly	30
Annual Review	Classified	05	Integrated 09/04/2024 06/20/2025	5 Weekly	80 Classroom	Speech/Language 09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	05	Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language 09/12/2024 06/13/2025	Individual Therapy	1 Weekly	30
Annual Review	Classified	05	Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language 09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	05	Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language 09/12/2024 06/13/2025	Individual Therapy	1 Weekly	30
Annual Review	Classified	05	Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language 09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	03/01/2024 04	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Speech/Language 09/12/2024 06/13/2025	Individual Therapy	1 Weekly	30
Annual Review	Classified	04	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Speech/Language 09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Review	Classified	04	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Speech/Language 09/12/2024 06/13/2025	Individual Therapy	1 Weekly	30
Reevaluation/Annual Review	Classified	04	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Speech/Language 09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation/Annual Review	Classified	04	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Occupational Therapy 09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	04	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Occupational Therapy 09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	04	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Speech/Language 09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Review	Classified	04	Resource Room Program 09/05/2024 06/27/2025 5:1	5 Weekly	40 Resource Room	Speech/Language 09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	05	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Speech/Language 09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	05	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Speech/Language 09/12/2024 06/13/2025	Individual Therapy	1 Weekly	30
Annual Review	Classified	03/04/2024 05	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Speech/Language 09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	05	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Speech/Language 09/12/2024 06/13/2025	Individual Therapy	1 Weekly	30
Annual Review	Classified	05	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Speech/Language 09/12/2024 06/13/2025	Individual Therapy	1 Weekly	30
Annual Review	Classified	05	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Speech/Language 09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	05	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Occupational Therapy 09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	05	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Counseling-Social Skills 09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	05	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Parent Counseling and Training 09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	05	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Behavior Intervention Services 09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation/Annual Review	Classified	05	Special Class 09/04/2024 06/20/2025 15:1+1	6 Weekly	40 Separate	Speech/Language 09/12/2024 06/13/2025	Individual Therapy	1 Weekly	30
Reevaluation/Annual Review	Classified	05	Special Class 09/04/2024 06/20/2025 15:1+1	6 Weekly	40 Separate	Speech/Language 09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Review	Classified	05	Special Class 09/04/2024 06/20/2025 15:1+1	6 Weekly	40 Separate	Occupational Therapy 09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	05	Special Class 09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Speech/Language 09/12/2024 06/13/2025	Individual	1 Weekly	30

Annual Review	Classified	05	Class Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	1nerapy Parent Counseling and Training	09/12/2024 06/13/2025 Small Group	4 Yearly	60
Annual Review	Classified	05	Class Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	2 Weekly	30
Annual Review	Classified	03/05/2024 10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class				
Reevaluation/Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class				
Reevaluation/Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class				
Reevaluation/Annual Review	Classified	04	Class Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Occupational Therapy	09/12/2024 06/13/2025 Small Group	2 Weekly	30
Reevaluation/Annual Review	Classified	04	Class Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	2 Weekly	30
Reevaluation/Annual Review	Classified	04	Class Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025 Individual	5 Weekly	5
Reevaluation/Annual Review	Classified	04	Class Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Physical Therapy	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Review	Classified	04	Class Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	04	Class Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	2 Weekly	30
Annual Review	Classified	04	Class Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025 Individual	1 Weekly	5
Annual Review	Classified	04	Class Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Separate	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Reevaluation/Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class				
Reevaluation/Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class				
Reevaluation/Annual Review	Classified	12	Resource Room Program	09/04/2024 06/13/2025 5:1	5 Every 2 weeks	40 Separate				
Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class				
Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class				
Reevaluation/Annual Review	Classified	04	Class Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Reevaluation/Annual Review	Classified	04	Class Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Counseling	09/12/2024 06/13/2025 Individual	2 Monthly	30
Reevaluation/Annual Review	Classified	04	Class Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Behavior Intervention Services	09/12/2024 06/13/2025 Individual	2 Monthly	30
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class				
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class				
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	42 English Class				
Annual Review	Classified	10	Resource Room Program	09/04/2024 06/13/2025 5:1	5 Daily	40 Separate				
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class				
Reevaluation/Annual Review	Classified	04	Integrated Co-teaching	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	2 Weekly	30

Reevaluation/Annual Classified Review	04	Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Classified Review	04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation/Annual Classified Review	04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Classified Review	04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Classified Review	04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation/Annual Classified Review	04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Classified Review	04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Classified Review	04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation/Annual Classified Review	04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Classified Review	04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Classified Review	04	Co-teaching Services Integrated 09/04/2024 06/20/2025	5 Weekly	40 Classroom	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation/Annual Classified Review	03/08/2024 07	Special Class - Social Studies Integrated 09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Classified Review	07	Special Class - English Integrated 09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Classified Review	07	Special Class - Reading Integrated 09/04/2024 06/13/2025 15:1	5 Weekly	40 Reading Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Classified Review	07	Special Class - Math Integrated 09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Classified Review	07	Special Class - Science Integrated 09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review Classified	07	Resource Room Program Integrated 09/04/2024 06/13/2025 5:1	5 Weekly	40 Separate					
Reevaluation/Annual Classified Review	07	Special Class - Social Studies Integrated 09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation/Annual Classified Review	07	Special Class - Social Studies Integrated 09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Reevaluation/Annual Classified Review	07	Special Class - English Integrated 09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation/Annual Classified Review	07	Special Class - English Integrated 09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Reevaluation/Annual Classified Review	07	Special Class - Reading Integrated 09/04/2024 06/13/2025 15:1	5 Weekly	40 Reading Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation/Annual Classified Review	07	Special Class - Integrated 09/04/2024 06/13/2025 15:1	5 Weekly	40 Reading Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30

				Reading								
Reevaluation/Annual Review	Classified	07		Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation/Annual Review	Classified	07		Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Special Class	09/04/2024 06/27/2025 12:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Special Class	09/04/2024 06/27/2025 12:1+1	6 Daily	40 Separate	Occupational Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Special Class	09/04/2024 06/27/2025 12:1+1	6 Daily	40 Separate	Physical Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Special Class	09/04/2024 06/27/2025 12:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	20
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Special Class	09/04/2024 06/27/2025 12:1+1	6 Daily	40 Separate	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	07		Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class					
Annual Review	Classified	07		Special Class - English	09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class					
Annual Review	Classified	07		Special Class - Reading	09/04/2024 06/13/2025 15:1	5 Weekly	40 Reading Class					
Annual Review	Classified	07		Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class					
Annual Review	Classified	07		Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class					
Annual Review	Classified	07		Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class	Behavior Intervention Services	09/12/2024 06/13/2025	Individual	1 Monthly	30
Annual Review	Classified	07		Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class	Behavior Intervention Services	09/12/2024 06/13/2025	Individual	1 Monthly	30
Annual Review	Classified	07		Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Behavior Intervention Services	09/12/2024 06/13/2025	Individual	1 Monthly	30
Annual Review	Classified	07		Special Class - English	09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class	Behavior Intervention Services	09/12/2024 06/13/2025	Individual	1 Monthly	30
Annual Review	Classified	07		Special Class - Reading	09/04/2024 06/13/2025 15:1	5 Weekly	40 Reading Class	Behavior Intervention Services	09/12/2024 06/13/2025	Individual	1 Monthly	30
Annual Review	Classified	03/11/2024	12									
Annual Review	Classified	11		Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	11		Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	11		Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class	Occupational Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	11		Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	11		Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	11		Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	11		Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Occupational Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	11		Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	11		Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30

Reevaluation/Annual Review	Classified	03/13/2024	06	Co- teaching Services Integrated	09/04/2024	06/13/2025	5 Weekly	40 Science Class	Counseling	09/12/2024	06/13/2025	Individual	2 Monthly	30
Reevaluation/Annual Review	Classified		06	Co- teaching Services Special Class	09/04/2024	06/13/2025 15:1	15 Weekly	40 Humanities Class	Counseling	09/12/2024	06/13/2025	Individual	2 Monthly	30
Reevaluation/Annual Review	Classified		06	Co- teaching Services Integrated	09/04/2024	06/13/2025	5 Daily	80 Classroom	Counseling	09/12/2024	06/13/2025	Individual	2 Monthly	30
Annual Review	Classified		06	Co- teaching Services Special Class	09/04/2024	06/13/2025 15:1	15 Weekly	40 Humanities Class						
Annual Review	Classified		06	Co- teaching Services Special Class - Math	09/04/2024	06/13/2025 15:1	5 Weekly	40 Math Class						
Annual Review	Classified		06	Co- teaching Services Special Class - Science	09/04/2024	06/13/2025 15:1	5 Weekly	40 Science Class						
Reevaluation/Annual Review	Classified		06	Co- teaching Services Special Class - Math	09/04/2024	06/13/2025 15:1	5 Weekly	40 Math Class	Counseling	09/12/2024	06/13/2025	Individual	1 Weekly	30
Reevaluation/Annual Review	Classified		06	Co- teaching Services Special Class - Science	09/04/2024	06/13/2025 15:1	5 Weekly	40 Science Class	Counseling	09/12/2024	06/13/2025	Individual	1 Weekly	30
Reevaluation/Annual Review	Classified		06	Co- teaching Services Special Class	09/04/2024	06/13/2025 15:1	15 Weekly	40 Humanities Class	Counseling	09/12/2024	06/13/2025	Individual	1 Weekly	30
Annual Review	Classified		06	Co- teaching Services Integrated	09/04/2024	06/13/2025	5 Weekly	40 Science Class	Occupational Therapy	09/12/2024	06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified		06	Co- teaching Services Integrated	09/04/2024	06/13/2025	25 Every 2 weeks	40 Humanities Class	Occupational Therapy	09/12/2024	06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified		06	Co- teaching Services Integrated	09/04/2024	06/13/2025	5 Weekly	80 Classroom	Occupational Therapy	09/12/2024	06/13/2025	Small Group	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	03/14/2024	Kdg.	Co- teaching Services Special Class	09/04/2024	06/27/2025 12:1+1	6 Daily	40 Separate	Parent Counseling and Training	09/12/2024	06/13/2025	Small Group	4 Yearly	60
Reevaluation CPSE to CSE Transition	Classified		Kdg.	Co- teaching Services Special Class	09/04/2024	06/27/2025 12:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024	06/13/2025	Small Group	2 Weekly	20
Reevaluation CPSE to CSE Transition	Classified		Kdg.	Co- teaching Services Special Class	09/04/2024	06/27/2025 12:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024	06/13/2025	Individual	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified		Kdg.	Co- teaching Services Special Class	09/04/2024	06/27/2025 12:1+1	6 Daily	40 Separate	Occupational Therapy	09/12/2024	06/13/2025	Individual	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified		Kdg.	Co- teaching Services Special Class	09/04/2024	06/27/2025 12:1+1	6 Daily	40 Separate	Physical Therapy	09/12/2024	06/13/2025	Individual	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified		Kdg.	Co- teaching Services Special Class	09/04/2024	06/27/2025 12:1+1	6 Daily	40 Separate	Counseling	09/12/2024	06/13/2025	Small Group	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified		Kdg.	Co- teaching Services Special Class	09/04/2024	06/27/2025 15:1+1	6 Daily	40 Separate	Physical Therapy	09/12/2024	06/13/2025	Individual	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified		Kdg.	Co- teaching Services Special Class	09/04/2024	06/27/2025 15:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024	06/13/2025	Small Group	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified		Kdg.	Co- teaching Services Special Class	09/04/2024	06/27/2025 15:1+1	6 Daily	40 Separate	Occupational Therapy	09/12/2024	06/13/2025	Individual	2 Weekly	30
Reevaluation/Annual Review	Classified		09	Co- teaching Services Integrated	09/04/2024	06/13/2025	5 Weekly	40 English Class						
Reevaluation/Annual Review	Classified		09	Co- teaching Services Special Class - Math	09/04/2024	06/13/2025 15:1	5 Weekly	40 Math-Class						
Reevaluation/Annual Review	Classified		09	Co- teaching Services Integrated	09/04/2024	06/13/2025	5 Weekly	40 Science Class						
Reevaluation/Annual Review	Classified		09	Co- teaching Services Integrated	09/04/2024	06/13/2025	5 Weekly	40 Social Studies Class						
Reevaluation CPSE to CSE Transition	Classified		Kdg.	Co- teaching Services Integrated	09/04/2024	06/27/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024	06/13/2025	Small Group	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified		Kdg.	Co- teaching Services Integrated	09/04/2024	06/27/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024	06/13/2025	Small Group	1 Weekly	30

				Services											
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Integrated Co-teaching Services	09/04/2024	06/27/2025	5 Weekly	40 Classroom	Physical Therapy	09/12/2024	06/13/2025	Individual	1 Weekly	30	
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Integrated Co-teaching Services	09/04/2024	06/27/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024	06/13/2025	Individual	1 Weekly	30	
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Integrated Co-teaching Services	09/04/2024	06/27/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024	06/13/2025	Small Group	2 Weekly	30	
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Integrated Co-teaching Services	09/04/2024	06/27/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024	06/13/2025	Small Group	1 Weekly	30	
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Integrated Co-teaching Services	09/04/2024	06/27/2025	5 Weekly	40 Classroom	Physical Therapy	09/12/2024	06/13/2025	Individual	1 Weekly	30	
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Integrated Co-teaching Services	09/04/2024	06/27/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024	06/13/2025	Individual	1 Weekly	30	
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Integrated Co-teaching Services	09/04/2024	06/27/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024	06/13/2025	Small Group	2 Weekly	30	
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Integrated Co-teaching Services	09/04/2024	06/27/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024	06/13/2025	Small Group	1 Weekly	30	
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Integrated Co-teaching Services	09/04/2024	06/27/2025	5 Weekly	40 Classroom	Physical Therapy	09/12/2024	06/13/2025	Individual	1 Weekly	30	
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Integrated Co-teaching Services	09/04/2024	06/27/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024	06/13/2025	Individual	1 Weekly	30	
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Integrated Co-teaching Services	09/04/2024	06/27/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024	06/13/2025	Small Group	2 Weekly	30	
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Integrated Co-teaching Services	09/04/2024	06/27/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024	06/13/2025	Small Group	1 Weekly	30	
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Integrated Co-teaching Services	09/04/2024	06/27/2025	5 Weekly	40 Classroom	Physical Therapy	09/12/2024	06/13/2025	Individual	1 Weekly	30	
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Integrated Co-teaching Services	09/04/2024	06/27/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024	06/13/2025	Individual	1 Weekly	30	
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Special Class	09/04/2024	06/27/2025	15:1+1	6 Daily	40 Separate	Occupational Therapy	09/12/2024	06/13/2025	Small Group	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Special Class	09/04/2024	06/27/2025	15:1+1	6 Daily	40 Separate	Counseling-Social Skills	09/12/2024	06/13/2025	Small Group	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Special Class	09/04/2024	06/27/2025	15:1+1	6 Daily	40 Separate	Occupational Therapy	09/12/2024	06/13/2025	Individual	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Special Class	09/04/2024	06/27/2025	15:1+1	6 Daily	40 Separate	Counseling	09/12/2024	06/13/2025	Individual	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Special Class	09/04/2024	06/27/2025	15:1+1	6 Daily	40 Separate	Parent Counseling and Training	09/12/2024	06/13/2025	Small Group	4 Yearly	60
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Special Class	09/04/2024	06/27/2025	15:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024	06/13/2025	Individual	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Special Class	09/04/2024	06/27/2025	15:1+1	6 Daily	40 Separate	Occupational Therapy	09/12/2024	06/13/2025	Individual	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Special Class	09/04/2024	06/27/2025	15:1+1	6 Daily	40 Separate	Physical Therapy	09/12/2024	06/13/2025	Individual	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Special Class	09/04/2024	06/27/2025	15:1+1	6 Daily	40 Separate	Occupational Therapy	09/12/2024	06/13/2025	Small Group	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Special Class	09/04/2024	06/27/2025	15:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024	06/13/2025	Small Group	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Special Class	09/04/2024	06/27/2025	15:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024	06/13/2025	Individual	5 Weekly	5
Reevaluation/Annual Review	Classified		03/15/2024	09 Integrated Co-	09/04/2024	06/13/2025	5 Bi-weekly	40 Math Class							

Reevaluation/Annual Classified Review		09	teacning Services Integrated 09/04/2024 06/13/2025	5 Bi-weekly	40 Science Class						
Reevaluation/Annual Classified Review		09	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Math Class						
Reevaluation/Annual Classified Review		09	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Science Class						
Reevaluation/Annual Classified Review		09	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 English Class						
Annual Review	Classified	07	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025	Individual	2 Weekly	30	
Annual Review	Classified	07	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30	
Annual Review	Classified	07	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60	
Annual Review	Classified	07	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 English Class	Counseling	09/12/2024 06/13/2025	Individual	2 Weekly	30	
Annual Review	Classified	07	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 English Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30	
Annual Review	Classified	07	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 English Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60	
Annual Review	Classified	07	Special Class - Math 09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025	Individual	2 Weekly	30	
Annual Review	Classified	07	Special Class - Math 09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30	
Annual Review	Classified	07	Special Class - Math 09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60	
Annual Review	Classified	07	Special Class - Science 09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025	Individual	2 Weekly	30	
Annual Review	Classified	07	Special Class - Science 09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30	
Annual Review	Classified	07	Special Class - Science 09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60	
Reevaluation/Annual Classified Review		09	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Bi-weekly	40 Math Class						
Reevaluation/Annual Classified Review		09	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Bi-monthly	40 Science Class						
Reevaluation/Annual Classified Review		09	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Math Class						
Reevaluation/Annual Classified Review		09	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Science Class						
Reevaluation/Annual Classified Review		09	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class						
Reevaluation/Annual Classified Review		09	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 English Class						

Annual Review	Classified	07	Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 English / Language Arts Class								
Annual Review	Classified	07	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class								
Annual Review	Classified	07	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Math Class								
Annual Review	Classified	07	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Science Class								
Reevaluation/Annual Review	Classified	07	Special Class - English 09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group		2 Weekly		30	
Reevaluation/Annual Review	Classified	07	Special Class - English 09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group		1 Weekly		30	
Reevaluation/Annual Review	Classified	07	Special Class - English 09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Occupational Therapy	09/12/2024 06/13/2025	Small Group		1 Weekly		30	
Reevaluation/Annual Review	Classified	07	Special Class - English 09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Physical Therapy	09/12/2024 06/13/2025	Individual		1 Weekly		30	
Reevaluation/Annual Review	Classified	07	Special Class - English 09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group		4 Yearly		60	
Reevaluation/Annual Review	Classified	07	Special Class - Reading 09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group		2 Weekly		30	
Reevaluation/Annual Review	Classified	07	Special Class - Reading 09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group		1 Weekly		30	
Reevaluation/Annual Review	Classified	07	Special Class - Reading 09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Occupational Therapy	09/12/2024 06/13/2025	Small Group		1 Weekly		30	
Reevaluation/Annual Review	Classified	07	Special Class - Reading 09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Physical Therapy	09/12/2024 06/13/2025	Individual		1 Weekly		30	
Reevaluation/Annual Review	Classified	07	Special Class - Reading 09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group		4 Yearly		60	
Reevaluation/Annual Review	Classified	07	Special Class - Social Studies 09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group		2 Weekly		30	
Reevaluation/Annual Review	Classified	07	Special Class - Social Studies 09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group		1 Weekly		30	
Reevaluation/Annual Review	Classified	07	Special Class - Social Studies 09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Occupational Therapy	09/12/2024 06/13/2025	Small Group		1 Weekly		30	
Reevaluation/Annual Review	Classified	07	Special Class - Social Studies 09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Physical Therapy	09/12/2024 06/13/2025	Individual		1 Weekly		30	
Reevaluation/Annual Review	Classified	07	Special Class - Social Studies 09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group		4 Yearly		60	
Reevaluation/Annual Review	Classified	07	Special Class - Math 09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group		2 Weekly		30	
Reevaluation/Annual Review	Classified	07	Special Class - Math 09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group		1 Weekly		30	
Reevaluation/Annual Review	Classified	07	Special Class - Math 09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Occupational Therapy	09/12/2024 06/13/2025	Small Group		1 Weekly		30	
Reevaluation/Annual Review	Classified	07	Special Class - Math 09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Physical Therapy	09/12/2024 06/13/2025	Individual		1 Weekly		30	
Reevaluation/Annual Review	Classified	07	Special Class - Math 09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group		4 Yearly		60	
Reevaluation/Annual Review	Classified	07	Special Class - Math 09/04/2024 06/13/2025 15:1	5 Weekly	40 Science	Speech/Language Therapy	09/12/2024 06/13/2025	Small		2 Weekly		30	

Review			Class -			Class	Therapy	Group		
Reevaluation/Annual Classified Review	07		Science Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Reevaluation/Annual Classified Review	07		Science Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Occupational Therapy	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Reevaluation/Annual Classified Review	07		Science Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Physical Therapy	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Classified Review	07		Science Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Parent Counseling and Training	09/12/2024 06/13/2025 Small Group	4 Yearly	60
Reevaluation/Annual Classified Review	07		Reading Special Class - Reading	09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Classified Review	07		Reading Special Class - Reading	09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	2 Weekly	30
Reevaluation/Annual Classified Review	07		Social Studies Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Classified Review	07		Social Studies Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	2 Weekly	30
Reevaluation/Annual Classified Review	07		Math Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Classified Review	07		Math Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	2 Weekly	30
Reevaluation/Annual Classified Review	07		Science Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Classified Review	07		Science Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	2 Weekly	30
Reevaluation/Annual Classified Review	07		English Special Class - English	09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Classified Review	07		English Special Class - English	09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	2 Weekly	30
Annual Review	Classified	03/18/2024 09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class				
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class				
Annual Review	Classified	09	Science Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class				
Annual Review	Classified	09	Math Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class				
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class				
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class				
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class				
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class				
Reevaluation/Annual Classified Review	09		Science Special Class	09/04/2024 06/13/2025 15:1	5 Every 2 weeks	40 Science Class	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Reevaluation/Annual Classified Review	09		Science Special Class	09/04/2024 06/13/2025 15:1	5 Every 2 weeks	40 Science Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Classified Review	09		Math Special Class -	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30

Reevaluation/Annual Classified Review		09	Math Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Classified Review		09	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Reevaluation/Annual Classified Review		09	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Classified Review		09	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Reevaluation/Annual Classified Review		09	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Classified Review		09	Special Class - English	09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Reevaluation/Annual Classified Review		09	Special Class - English	09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English / Language Arts Class				
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class				
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class				
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class				
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Math Class				
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class				
Annual Review	Classified	11	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class				
Annual Review	Classified	11	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Math Class				
Annual Review	Classified	11	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class				
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Special Class	09/04/2024 06/27/2025 15:1+1	6 Daily	40 Separate	Counseling-Social Skills	09/04/2024 06/27/2025 Small Group	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Special Class	09/04/2024 06/27/2025 15:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/04/2024 06/27/2025 Small Group	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Special Class	09/04/2024 06/27/2025 15:1+1	6 Daily	40 Separate	Occupational Therapy	09/04/2024 06/27/2025 Individual	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Special Class	09/04/2024 06/27/2025 15:1+1	6 Daily	40 Separate	Parent Counseling and Training	09/04/2024 06/27/2025 Small Group	4 Yearly	60
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Special Class	09/04/2024 06/27/2025 15:1+1	6 Daily	40 Separate	Physical Therapy	09/04/2024 06/27/2025 Individual	1 Weekly	30
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English / Language Arts Class				
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class				
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class				

Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class								
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Math Class								
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class								
Annual Review	Classified	11	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class								
Annual Review	Classified	11	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class								
Reevaluation/Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class								
Reevaluation/Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Math Class								
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30			
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30			
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30			
Annual Review	Classified	09	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30			
Annual Review	Classified	09	Special Class - English	09/04/2024 06/13/2025 15:1+1	5 Weekly	40 English Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30			
Annual Review	Classified	09	Special Class - Reading	09/04/2024 06/13/2025 15:1+1	5 Weekly	40 Reading Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30			
Reevaluation/Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class								
Reevaluation/Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Math Class								
Annual Review	Classified	03/19/2024 09	Special Class	09/04/2024 06/13/2025 15:1	5 Bi-weekly	40 Science Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30			
Annual Review	Classified	09	Special Class - English	09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30			
Annual Review	Classified	09	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30			
Annual Review	Classified	09	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30			
Annual Review	Classified	09	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30			
Reevaluation/Annual Review	Classified	12	Special Class	09/03/2024 06/27/2025 15:1	5 Weekly	360 Separate	Counseling	09/03/2024 06/27/2025	Individual	1 Weekly	30			
Reevaluation/Annual Review	Classified	12	Special Class	09/03/2024 06/27/2025 15:1	5 Weekly	360 Separate	Counseling	09/03/2024 06/27/2025	Small Group	1 Weekly	30			
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Bi-weekly	40 Math Class								
Annual Review	Classified	09	Integrated Co-	09/04/2024 06/13/2025	5 Weekly	40 Math Class								

Annual Review	Classified	09	teaching Services Special Class - English	09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class								
Annual Review	Classified	09	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class								
Annual Review	Classified	09	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class								
Program Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Bi-weekly	40 Science Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30				
Program Review	Classified	09	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30				
Program Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30				
Program Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30				
Program Review	Classified	09	Special Class - English	09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30				
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Bi-weekly	40 Science Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30				
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English / Language Arts Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30				
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30				
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30				
Reevaluation/Annual Review	Classified	07	Special Class	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025 Individual	2 Weekly	30				
Reevaluation/Annual Review	Classified	07	Special Class	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	2 Weekly	30				
Reevaluation/Annual Review	Classified	07	Special Class	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025 Individual	1 Weekly	30				
Reevaluation/Annual Review	Classified	07	Special Class	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Classroom	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30				
Annual Review	Classified	03/20/2024 11	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30				
Annual Review	Classified	11	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30				
Reevaluation/Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class								
Reevaluation/Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class								
Reevaluation/Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class								
Reevaluation/Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class								
Reevaluation/Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Math Class								
Reevaluation/Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2	40 Science								

Review			Lo-teaching Services	weeks	Class						
Reevaluation/Annual Classified Review		10	Special Class - Social Studies	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Social Studies Class	Occupational Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation/Annual Classified Review		10	Special Class - Social Studies	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Social Studies Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Classified Review		10	Special Class - Science	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Science Class	Occupational Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation/Annual Classified Review		10	Special Class - Science	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Classified Review		10	Special Class	09/04/2024 06/13/2025 12:1+1	5 Every 2 weeks	40 Separate	Occupational Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation/Annual Classified Review		10	Special Class	09/04/2024 06/13/2025 12:1+1	5 Every 2 weeks	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Classified Review		10	Special Class - Reading	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 English / Language Arts Class	Occupational Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation/Annual Classified Review		10	Special Class - Reading	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 English / Language Arts Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Classified Review		10	Special Class - English	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 English / Language Arts Class	Occupational Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation/Annual Classified Review		10	Special Class - English	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 English / Language Arts Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Classified Review		10	Special Class - Math	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	Occupational Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation/Annual Classified Review		10	Special Class - Math	09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified		Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class					
Annual Review	Classified		Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English / Language Arts Class					
Annual Review	Classified		Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Math Class					
Reevaluation/Annual Classified Review		10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class					
Reevaluation/Annual Classified Review		10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class					
Reevaluation/Annual Classified Review		10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class					
Reevaluation/Annual Classified Review		10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class					
Reevaluation/Annual Classified Review		10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Math Class					
Reevaluation/Annual Classified Review		10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class					
Annual Review	Classified	03/21/2024	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class					
Annual Review	Classified		Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class					

Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class					
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class					
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Math Class					
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class					
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Special Class	09/04/2024 06/27/2025 15:1+1	6 Daily	40 Separate	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Special Class	09/04/2024 06/27/2025 15:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Special Class	09/04/2024 06/27/2025 15:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Special Class	09/04/2024 06/27/2025 15:1+1	6 Daily	40 Separate	Occupational Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Special Class	09/04/2024 06/27/2025 15:1+1	6 Daily	40 Separate	Occupational Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation/Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class					
Reevaluation/Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class					
Reevaluation/Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class					
Reevaluation/Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class					
Reevaluation/Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Math Class					
Reevaluation/Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class					
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class					
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class					
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class					
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class					
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Math Class					
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class					
Reevaluation/Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation/Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30

Reevaluation/Annual Review	Classified	12	Resource Room Program	09/04/2024 06/13/2025 5:1	5 Every 2 weeks	40 Separate	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	11	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	42 English / Language Arts Class				
Annual Review	Classified	11	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class				
Annual Review	Classified	03/22/2024 10	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class				
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English / Language Arts Class				
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class				
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class				
Annual Review	Classified	10	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class				
Reevaluation/Annual Review	Classified	07	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class				
Reevaluation/Annual Review	Classified	07	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class				
Annual Review	Classified	07	Integrated Co-teaching Services	09/05/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	07	Integrated Co-teaching Services	09/05/2024 06/13/2025	5 Weekly	40 English / Language Arts Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	07	Integrated Co-teaching Services	09/05/2024 06/13/2025	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	07	Integrated Co-teaching Services	09/05/2024 06/13/2025	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	07	Integrated Co-teaching Services	09/05/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling-Social Skills	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	07	Integrated Co-teaching Services	09/05/2024 06/13/2025	5 Weekly	40 English / Language Arts Class	Counseling-Social Skills	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	07	Integrated Co-teaching Services	09/05/2024 06/13/2025	5 Weekly	40 Math Class	Counseling-Social Skills	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	07	Integrated Co-teaching Services	09/05/2024 06/13/2025	5 Weekly	40 Science Class	Counseling-Social Skills	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	11	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class				
Annual Review	Classified	11	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class				
Annual Review	Classified	11	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class				
Annual Review	Classified	11	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Math Class				

Annual Review	Classified	11	teaching Services	Integrated 09/04/2024 06/13/2025	5 Weekly	40 English Class							
Annual Review	Classified	11	Co-teaching Services	Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class							
Reevaluation/Annual Review	Classified	07	Co-teaching Services	Integrated 09/04/2024 06/13/2025	5 Weekly	40 English / Language Arts Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30		
Reevaluation/Annual Review	Classified	07	Co-teaching Services	Integrated 09/04/2024 06/13/2025	5 Weekly	40 English / Language Arts Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30		
Reevaluation/Annual Review	Classified	07	Co-teaching Services	Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30		
Reevaluation/Annual Review	Classified	07	Co-teaching Services	Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30		
Reevaluation/Annual Review	Classified	07	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30		
Reevaluation/Annual Review	Classified	07	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30		
Reevaluation/Annual Review	Classified	07	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30		
Reevaluation/Annual Review	Classified	07	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30		
Reevaluation/Annual Review	Classified	11	Co-teaching Services	Integrated 09/04/2024 06/13/2025	5 Weekly	40 English Class							
Reevaluation/Annual Review	Classified	11	Co-teaching Services	Integrated 09/04/2024 06/13/2025	5 Weekly	40 Math Class							
Reevaluation/Annual Review	Classified	11	Co-teaching Services	Integrated 09/04/2024 06/13/2025	5 Every 2 weeks	40 Math Class							
Reevaluation/Annual Review	Classified	11	Co-teaching Services	Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class							
Reevaluation/Annual Review	Classified	11	Co-teaching Services	Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class							
Reevaluation/Annual Review	Classified	11	Co-teaching Services	Integrated 09/04/2024 06/13/2025	5 Weekly	40 English / Language Arts Class							
Annual Review	Classified	07	Co-teaching Services	Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30		
Annual Review	Classified	07	Co-teaching Services	Integrated 09/04/2024 06/13/2025	5 Weekly	40 English Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30		
Annual Review	Classified	07	Co-teaching Services	Integrated 09/04/2024 06/13/2025	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30		
Annual Review	Classified	07	Co-teaching Services	Integrated 09/04/2024 06/13/2025	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30		
Reevaluation/Annual Review	Classified	03/25/2024 12	Special Class	09/05/2024 06/27/2025 12:1+1	5 Weekly	360 Across School Setting	Speech/Language Therapy	09/05/2024 06/27/2025	Small Group	1 Weekly	30		
Reevaluation/Annual Review	Classified	12	Special Class	09/05/2024 06/27/2025 12:1+1	5 Weekly	360 Across School	Counseling-Social Skills	09/05/2024 06/27/2025	Small Group	1 Weekly	30		

Reevaluation/Annual Classified Review		12	Special Class	09/05/2024 06/27/2025 12:1+1	5 Weekly	360 Across School Setting	Counseling	09/05/2024 06/27/2025 Individual	2 Weekly	30
Reevaluation/Annual Classified Review		12	Special Class	09/05/2024 06/27/2025 12:1+1	5 Weekly	360 Across School Setting	Parent Counseling and Training	09/05/2024 06/27/2025 Small Group	4 Yearly	60
Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class				
Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class				
Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class				
Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Bi-weekly	40 Math Class				
Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class				
Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class				
Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class				
Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class				
Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class				
Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class				
Reevaluation/Annual Classified Review		12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class				
Reevaluation/Annual Classified Review		12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class				
Reevaluation/Annual Classified Review		10	Special Class	09/05/2024 06/27/2025 12:1+1	1 Daily	360 Across School Setting	Counseling	09/05/2024 06/27/2025 Individual	2 Weekly	30
Reevaluation/Annual Classified Review		10	Special Class	09/05/2024 06/27/2025 12:1+1	1 Daily	360 Across School Setting	Counseling	09/05/2024 06/27/2025 Small Group	1 Weekly	30
Annual Review	Classified	08	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	08	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class	Counseling	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	08	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	08	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	08	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	08	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025 Small Group	1 Weekly	30

Annual Review	Classified	08	teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30		
Annual Review	Classified	08	Co- teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025	Small Group	1 Weekly	30		
Reevaluation/Annual Review	Classified	12	Co- teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 English Class							
Annual Review	Classified	12	Special Class 09/05/2024 06/27/2025 12:1+1	5 Weekly	180 Classroom	Psychological Counseling Services	09/05/2024 06/27/2025	Individual	2 Weekly	30		
Annual Review	Classified	12	Special Class 09/05/2024 06/27/2025 12:1+1	5 Weekly	180 Islip Career Center	Psychological Counseling Services	09/05/2024 06/27/2025	Individual	2 Weekly	30		
Annual Review	Classified	12	Integrated 09/04/2024 06/13/2025	5 Weekly	42 English Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30		
Annual Review	Classified	12	Co- teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	42 English Class	Counseling	09/12/2024 06/13/2025	Small Group	1 Weekly	30		
Annual Review	Classified	12	Co- teaching Services Integrated 09/05/2024 06/27/2025	5 Weekly	42 Math Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30		
Annual Review	Classified	12	Co- teaching Services Integrated 09/05/2024 06/27/2025	5 Weekly	42 Math Class	Counseling	09/12/2024 06/13/2025	Small Group	1 Weekly	30		
Annual Review	Classified	12	Co- teaching Services Integrated 09/05/2024 06/27/2025	5 Weekly	42 Science Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30		
Annual Review	Classified	12	Co- teaching Services Integrated 09/05/2024 06/27/2025	5 Weekly	42 Science Class	Counseling	09/12/2024 06/13/2025	Small Group	1 Weekly	30		
Annual Review	Classified	12	Co- teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	42 Social Studies Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30		
Annual Review	Classified	12	Co- teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	42 Social Studies Class	Counseling	09/12/2024 06/13/2025	Small Group	1 Weekly	30		
Annual Review	Classified	07	Special Class - Math 09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30		
Annual Review	Classified	07	Special Class - Math 09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30		
Annual Review	Classified	07	Special Class - Science 09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30		
Annual Review	Classified	07	Special Class - Science 09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30		
Annual Review	Classified	07	Special Class - Social Studies 09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Social Studies Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30		
Annual Review	Classified	07	Special Class - Social Studies 09/04/2024 06/13/2025 12:1+1	5 Weekly	40 Social Studies Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30		
Annual Review	Classified	07	Special Class - English 09/04/2024 06/13/2025 12:1+1	5 Weekly	40 English / Language Arts Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30		
Annual Review	Classified	07	Special Class - English 09/04/2024 06/13/2025 12:1+1	5 Weekly	40 English / Language Arts Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30		
Annual Review	Classified	07	Special Class - Reading 09/04/2024 06/13/2025 12:1+1	5 Yearly	40 English / Language Arts Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30		
Annual Review	Classified	07	Special Class - 09/04/2024 06/13/2025 12:1+1	5 Yearly	40 English / Language	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30		

		Reading			Arts Class				
Reevaluation/Annual Classified Review	03/26/2024	09	Integrated 09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly 30
Reevaluation/Annual Classified Review		09	Integrated 09/04/2024 06/13/2025	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly 30
Reevaluation/Annual Classified Review		09	Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly 30
Reevaluation/Annual Classified Review		09	Integrated 09/04/2024 06/13/2025	5 Weekly	40 English / Language Arts Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly 30
Reevaluation/Annual Classified Review		09	Special Class - Math 09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly 30
Annual Review	Classified	09	Integrated 09/04/2024 06/13/2025	5 Every 2 weeks	40 Math Class				
Annual Review	Classified	09	Integrated 09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class				
Annual Review	Classified	09	Integrated 09/04/2024 06/13/2025	5 Weekly	40 Math Class				
Annual Review	Classified	09	Integrated 09/04/2024 06/13/2025	5 Weekly	40 Science Class				
Annual Review	Classified	09	Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class				
Annual Review	Classified	09	Integrated 09/04/2024 06/13/2025	5 Weekly	40 English / Language Arts Class				
Annual Review	Classified	11	Special Class 09/05/2024 06/27/2025 12:1+1	5 Weekly	180 Across School Setting	Psychological Counseling Services	09/05/2024 06/27/2025	Individual	2 Weekly 30
Annual Review	Classified	11	Special Class 09/05/2024 06/27/2025 12:1+1	5 Weekly	180 Across School Setting	Psychological Counseling Services	09/05/2024 06/27/2025	Small Group	1 Weekly 30
Annual Review	Classified	11	Special Class 09/05/2024 06/27/2025 12:1+1	5 Weekly	180 Across School Setting	Psychological Counseling Services	09/05/2024 06/27/2025	Individual	2 Weekly 30
Annual Review	Classified	11	Special Class 09/05/2024 06/27/2025 12:1+1	5 Weekly	180 Across School Setting	Psychological Counseling Services	09/05/2024 06/27/2025	Small Group	1 Weekly 30
Annual Review	Classified	12	Special Class 09/05/2024 06/27/2025 12:1+1	5 Weekly	180 Across School Setting	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly 30
Annual Review	Classified	12	Special Class 09/05/2024 06/27/2025 12:1+1	5 Weekly	180 Across School Setting	Counseling	09/12/2024 06/13/2025	Small Group	1 Weekly 30
Annual Review	Classified	12	Special Class 09/05/2024 06/27/2025 12:1+1	5 Weekly	180 Across School Setting	Counseling	09/12/2024 06/13/2025	Small Group	1 Weekly 30
Annual Review	Classified	11	Special Class 09/05/2024 06/27/2025 12:1+1	5 Weekly	360 Across School Setting	Counseling	09/05/2024 06/27/2025	Individual	2 Weekly 30
Annual Review	Classified	11	Special Class 09/05/2024 06/27/2025 12:1+1	5 Weekly	360 Across School Setting	Counseling	09/05/2024 06/27/2025	Small Group	1 Weekly 30
Reevaluation/Annual Classified Review		11	Special Class 09/05/2024 06/27/2025 12:1+1	1 Daily	180 Across School Setting	Psychological Counseling Services	09/05/2024 06/27/2025	Individual	1 Weekly 30
Reevaluation/Annual Classified Review		11	Special Class 09/05/2024 06/27/2025 12:1+1	1 Daily	180 Across School Setting	Psychological Counseling Services	09/05/2024 06/27/2025	Small Group	1 Weekly 30
Reevaluation/Annual Classified Review		11	Special Class 09/05/2024 06/27/2025 12:1+1	1 Daily	180 Across School Setting	Psychological Counseling Services	09/05/2024 06/27/2025	Individual	1 Weekly 30

Reevaluation/Annual Classified Review		11	Special Class	09/05/2024 06/27/2025 12:1+1	1 Daily	180 Across School Setting	Psychological Counseling Services	09/05/2024 06/27/2025	Small Group	1 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	09	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	09	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	09	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Math Class	Itinerant Hearing Teacher	09/12/2024 06/13/2025	Individual	2 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class	Itinerant Hearing Teacher	09/12/2024 06/13/2025	Individual	2 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class	Itinerant Hearing Teacher	09/12/2024 06/13/2025	Individual	2 Weekly	30

Annual Review	Classified	09		Integrated 09/04/2024 06/13/2025	5 Weekly	40 Science Class	Speech/Language 09/12/2024 06/13/2025 Individual Therapy	1 Weekly	30
Annual Review	Classified	09		Integrated 09/04/2024 06/13/2025	5 Weekly	40 Science Class	Itinerant Hearing 09/12/2024 06/13/2025 Individual Teacher	2 Weekly	30
Annual Review	Classified	09		Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Speech/Language 09/12/2024 06/13/2025 Individual Therapy	1 Weekly	30
Annual Review	Classified	09		Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Itinerant Hearing 09/12/2024 06/13/2025 Individual Teacher	2 Weekly	30
Annual Review	Classified	09		Integrated 09/04/2024 06/13/2025	5 Weekly	40 English Class	Speech/Language 09/12/2024 06/13/2025 Individual Therapy	1 Weekly	30
Annual Review	Classified	09		Integrated 09/04/2024 06/13/2025	5 Weekly	40 English Class	Itinerant Hearing 09/12/2024 06/13/2025 Individual Teacher	2 Weekly	30
Annual Review	Classified	09		Resource Room Program 09/04/2024 06/13/2025 5:1	5 Weekly	40 Separate	Speech/Language 09/12/2024 06/13/2025 Individual Therapy	1 Weekly	30
Annual Review	Classified	09		Resource Room Program 09/04/2024 06/13/2025 5:1	5 Weekly	40 Separate	Itinerant Hearing 09/12/2024 06/13/2025 Individual Teacher	2 Weekly	30
Annual Review	Classified	09		Integrated 09/04/2024 06/13/2025	5 Every 2 weeks	40 Math Class			
Annual Review	Classified	09		Integrated 09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class			
Annual Review	Classified	09		Integrated 09/04/2024 06/13/2025	5 Weekly	40 Science Class			
Annual Review	Classified	09		Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class			
Annual Review	Classified	09		Integrated 09/04/2024 06/13/2025	5 Weekly	40 English Class			
Annual Review	Classified	09		Integrated 09/04/2024 06/13/2025	5 Weekly	40 Math Class			
Reevaluation/Annual Review	Classified	04/03/2024 09		Integrated 09/04/2024 06/13/2025	5 Every 2 weeks	40 Math Class			
Reevaluation/Annual Review	Classified	09		Integrated 09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class			
Reevaluation/Annual Review	Classified	09		Integrated 09/04/2024 06/13/2025	5 Weekly	40 English Class			
Reevaluation/Annual Review	Classified	09		Integrated 09/04/2024 06/13/2025	5 Weekly	40 Math Class			
Reevaluation/Annual Review	Classified	09		Integrated 09/04/2024 06/13/2025	5 Weekly	40 Science Class			
Reevaluation/Annual Review	Classified	09		Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class			
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Special Class 09/04/2024 06/27/2025 8:1:1	5 Weekly	330 Classroom	Speech/Language 09/04/2024 06/27/2025 Individual Therapy	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.		Special Class 09/04/2024 06/27/2025 8:1:1	5 Weekly	330 Classroom	Speech/Language 09/04/2024 06/27/2025 Individual Therapy	1 Weekly	30
Reevaluation CPSE	Classified	Kdg.		Special 09/04/2024 06/27/2025 8:1:1	5 Weekly	330 Classroom	Occupational 09/04/2024 06/27/2025 Individual	3 Weekly	30

to CSE Transition Reevaluation CPSE to CSE Transition	Classified	Kdg.	Class Special Class	09/04/2024 06/27/2025 8:1:1	5 Weekly	330 Classroom	Parent Counseling and Training	09/04/2024 06/27/2025	Small Group	4 Yearly	60
Reevaluation/Annual Review	Classified	09	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Every 2 weeks	40 Science Class					
Reevaluation/Annual Review	Classified	09	Integrated Co- teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class					
Reevaluation/Annual Review	Classified	09	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class					
Reevaluation/Annual Review	Classified	09	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class					
Reevaluation/Annual Review	Classified	09	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class					
Annual Review	Classified	10	Special Class	09/05/2024 06/27/2025 6:1+1	5 Weekly	360 Classroom	Psychological Counseling Services	09/05/2024 06/27/2025	Individual	3 Weekly	30
Annual Review	Classified	10	Special Class	09/05/2024 06/27/2025 6:1+1	5 Weekly	360 Classroom	Psychological Counseling Services	09/05/2024 06/27/2025	Small Group	1 Weekly	30
Annual Review	Classified	12	Integrated Co- teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Integrated Co- teaching Services	09/04/2024 06/27/2025	5 Weekly	40 Classroom	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Integrated Co- teaching Services	09/04/2024 06/27/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Integrated Co- teaching Services	09/04/2024 06/27/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Integrated Co- teaching Services	09/04/2024 06/27/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Integrated Co- teaching Services	09/04/2024 06/27/2025	5 Weekly	40 Classroom	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Integrated Co- teaching Services	09/04/2024 06/27/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Integrated Co- teaching Services	09/04/2024 06/27/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Integrated Co- teaching Services	09/04/2024 06/27/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Integrated Co- teaching Services	09/04/2024 06/27/2025	5 Weekly	40 Classroom	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Integrated Co- teaching Services	09/04/2024 06/27/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Integrated Co- teaching Services	09/04/2024 06/27/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Reevaluation CPSE to CSE Transition	Classified	Kdg.	Integrated Co- teaching Services	09/04/2024 06/27/2025	5 Weekly	40 Classroom	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30

Reevaluation CPSE to CSE Transition	Classified		Kdg.	Integrated 09/04/2024 06/27/2025 Co-teaching Services	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	40
Reevaluation CPSE to CSE Transition	Classified		Kdg.	Integrated 09/04/2024 06/27/2025 Co-teaching Services	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation CPSE to CSE Transition	Classified		Kdg.	Integrated 09/04/2024 06/27/2025 Co-teaching Services	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Annual Review	Classified		09	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Every 2 weeks	40 Math Class					
Annual Review	Classified		09	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Every 2 weeks	40 Science Class					
Annual Review	Classified		09	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Weekly	40 Math Class					
Annual Review	Classified		09	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Weekly	40 Science Class					
Reevaluation/Annual Review	Classified		11	Special Class 09/05/2024 06/27/2025 8:1+1	5 Weekly	210 Separate	Counseling	09/05/2024 06/27/2025	Individual	3 Weekly	30
Reevaluation/Annual Review	Classified		11	Special Class 09/05/2024 06/27/2025 8:1+1	5 Weekly	210 Separate	Counseling	09/05/2024 06/27/2025	Small Group	1 Weekly	30
Reevaluation/Annual Review	Classified		11	Special Class 09/05/2024 06/27/2025 8:1+1	5 Daily	150 Separate	Counseling	09/05/2024 06/27/2025	Individual	3 Weekly	30
Reevaluation/Annual Review	Classified		11	Special Class 09/05/2024 06/27/2025 8:1+1	5 Daily	150 Separate	Counseling	09/05/2024 06/27/2025	Small Group	1 Weekly	30
Annual Review	Classified		12	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Weekly	40 English Class	Counseling-Social Skills Counseling	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified		12	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Weekly	40 Social Studies Class	Counseling-Social Skills Counseling	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified		12	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Weekly	40 English Class					
Annual Review	Classified		12	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Weekly	40 English Class	Itinerant Hearing Teacher	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified		12	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Weekly	40 Social Studies Class	Itinerant Hearing Teacher	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified		12	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Weekly	40 English Class					
Annual Review	Classified		12	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Weekly	40 Social Studies Class					
Annual Review	Classified	04/04/2024	01	Special Class 09/04/2024 06/20/2025 12:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	20
Annual Review	Classified		01	Special Class 09/04/2024 06/20/2025 12:1+1	6 Daily	40 Separate	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified		01	Special Class 09/04/2024 06/20/2025 12:1+1	6 Daily	40 Separate	Behavior Intervention Services	09/12/2024 06/13/2025	Individual	2 Monthly	30
Annual Review	Classified		01	Special Class 09/04/2024 06/20/2025 12:1+1	6 Daily	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Annual Review	Classified		01	Special Class 09/04/2024 06/20/2025 12:1+1	6 Daily	40 Separate	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified		02	Integrated 09/04/2024 06/20/2025 Co-teaching Services	5 Weekly	40 Classroom					
Annual Review	Classified		09	Special Class - Math 09/05/2024 06/27/2025 15:1	5 Weekly	40 Math Class	Physical Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30

Annual Review	Classified	09	Special Class - Science	09/05/2024 06/27/2025 15:1	5 Weekly	40 Science Class	Physical Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	09	Special Class	09/05/2024 06/27/2025 15:1	5 Every 2 weeks	40 Science Class	Physical Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 English Class	Physical Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Social Studies Class	Physical Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Every 2 weeks	40 Science Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	09	Special Class - Math	09/05/2024 06/27/2025 15:1	5 Weekly	40 Math Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Science Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Social Studies Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 English Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation/Annual Review	Classified	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Every 2 weeks	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation/Annual Review	Classified	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Every 2 weeks	40 Math Class	Counseling	09/12/2024 06/13/2025	Individual	2 Monthly	30
Reevaluation/Annual Review	Classified	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Every 2 weeks	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation/Annual Review	Classified	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Every 2 weeks	40 Science Class	Counseling	09/12/2024 06/13/2025	Individual	2 Monthly	30
Reevaluation/Annual Review	Classified	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 English / Language Arts Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation/Annual Review	Classified	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 English / Language Arts Class	Counseling	09/12/2024 06/13/2025	Individual	2 Monthly	30
Reevaluation/Annual Review	Classified	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation/Annual Review	Classified	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025	Individual	2 Monthly	30
Reevaluation/Annual Review	Classified	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation/Annual Review	Classified	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025	Individual	2 Monthly	30
Reevaluation/Annual Review	Classified	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Social Studies Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation/Annual Review	Classified	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025	Individual	2 Monthly	30
Reevaluation/Annual Review	Classified	01	Special Class	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Reevaluation/Annual Review	Classified	01	Special	09/04/2024 06/20/2025 15:1+1	6 Daily	40 Classroom	Speech/Language	09/12/2024 06/13/2025	Small	1 Weekly	30

Annual Review	Classified	08	Special Class	09/05/2024 06/27/2025 8:1+1	1 Daily	360 All Academic Classes	Psychological Counseling Services	09/05/2024 06/27/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Special Class	09/05/2024 06/27/2025 8:1+1	1 Daily	360 All Academic Classes	Psychological Counseling Services	09/05/2024 06/27/2025	Individual	2 Weekly	30
Annual Review	Classified	08	Special Class	09/05/2024 06/27/2025 8:1+1	1 Daily	360 All Academic Classes	Parent Counseling and Training	09/05/2024 06/27/2025	Individual	1 Monthly	60
Annual Review	Classified	09	Special Class	09/05/2024 06/27/2025 12:1+1	5 Weekly	360 Across School Setting	Parent Counseling and Training	09/05/2024 06/27/2025	Individual	4 Yearly	60
Annual Review	Classified	09	Special Class	09/05/2024 06/27/2025 12:1+1	5 Weekly	360 Across School Setting	Psychological Counseling Services	09/05/2024 06/27/2025	Individual	1 Weekly	30
Annual Review	Classified	09	Special Class	09/05/2024 06/27/2025 12:1+1	5 Weekly	360 Across School Setting	Psychological Counseling Services	09/05/2024 06/27/2025	Small Group	1 Weekly	30
Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class					
Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class					
Reevaluation/Annual Review	Classified	11	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class					
Reevaluation/Annual Review	Classified	11	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class					
Annual Review	Classified	09	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	09	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	09	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	09	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	09	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	09	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	09	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Every 2 weeks	40 Science Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	09	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Every 2 weeks	40 Science Class	Counseling	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	09	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Every 2 weeks	40 Science Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	09	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	09	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	09	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	09	Special Class - English	09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	09	Special Class - English	09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class	Counseling	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	09	Special Class - English	09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation/Annual Review	Classified	11	Special	09/04/2024 06/13/2025 15:1	5 Weekly	40 English	Counseling-Social	09/12/2024 06/13/2025	Small	1 Weekly	30

Review			Class - English	Class	Skills	Group				
Reevaluation/Annual Classified Review	11		Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	04/09/2024 07	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 English Class	Speech/Language Therapy	09/12/2024 06/13/2025 Individual	3 Weekly	30
Annual Review	Classified	07	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 English Class	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	07	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 English Class	Parent Counseling and Training	09/12/2024 06/13/2025 Small Group	4 Yearly	60
Annual Review	Classified	07	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Social Studies Class	Speech/Language Therapy	09/12/2024 06/13/2025 Individual	3 Weekly	30
Annual Review	Classified	07	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Social Studies Class	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	07	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Social Studies Class	Parent Counseling and Training	09/12/2024 06/13/2025 Small Group	4 Yearly	60
Annual Review	Classified	07	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025 Individual	3 Weekly	30
Annual Review	Classified	07	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Math Class	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	07	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Math Class	Parent Counseling and Training	09/12/2024 06/13/2025 Small Group	4 Yearly	60
Annual Review	Classified	07	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025 Individual	3 Weekly	30
Annual Review	Classified	07	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Science Class	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	07	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Science Class	Parent Counseling and Training	09/12/2024 06/13/2025 Small Group	4 Yearly	60
Annual Review	Classified	02	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	2 Weekly	30
Annual Review	Classified	02	Special Class	09/04/2024 06/27/2025 15:1+1	6 Weekly	40 Separate	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	2 Weekly	30
Annual Review	Classified	04/10/2024 12	Resource Room Program	09/04/2024 06/13/2025 5:1	5 Weekly	40 Separate				
Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class				
Reevaluation/Annual Classified Review	10		Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Every 2 weeks	40 Science Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Classified Review	10		Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Classified Review	10		Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 English Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation/Annual Classified Review	10		Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30

Reevaluation/Annual Review	Classified	10	Integrated 09/04/2024 06/13/2025 Co- teaching Services	5 Every 2 weeks	40 Math Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation/Annual Review	Classified	10	Special Class - Social Studies 09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	12	Integrated 09/04/2024 06/13/2025 Co- teaching Services	5 Weekly	40 Social Studies Class					
Annual Review	Classified	12	Consultant 09/09/2024 06/13/2025 Teacher Services	5 Weekly	120 Across School Setting					
Annual Review	Classified	12	Special Class - Social Studies 09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	12	Special Class - English 09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	12	Integrated 09/04/2024 06/13/2025 Co- teaching Services	5 Weekly	40 English Class					
Annual Review	Classified	12	Integrated 09/04/2024 06/13/2025 Co- teaching Services	5 Weekly	40 Social Studies Class					
Annual Review	Classified	02	Integrated 09/04/2024 06/20/2025 Co- teaching Services	5 Weekly	40 Classroom	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	02	Integrated 09/04/2024 06/20/2025 Co- teaching Services	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	02	Integrated 09/04/2024 06/20/2025 Co- teaching Services	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	02	Integrated 09/04/2024 06/20/2025 Co- teaching Services	5 Weekly	40 Classroom	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	02	Integrated 09/04/2024 06/20/2025 Co- teaching Services	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	02	Integrated 09/04/2024 06/20/2025 Co- teaching Services	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	02	Integrated 09/04/2024 06/20/2025 Co- teaching Services	5 Weekly	40 Classroom	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	02	Integrated 09/04/2024 06/20/2025 Co- teaching Services	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	02	Integrated 09/04/2024 06/20/2025 Co- teaching Services	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	02	Integrated 09/04/2024 06/20/2025 Co- teaching Services	5 Weekly	40 Classroom	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	02	Integrated 09/04/2024 06/20/2025 Co- teaching Services	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	02	Integrated 09/04/2024 06/20/2025 Co- teaching Services	5 Weekly	40 Classroom	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	12	Integrated 09/04/2024 06/13/2025 Co- teaching Services	5 Weekly	40 Social Studies Class					
Annual Review	Classified	04/11/2024 08	Integrated 09/04/2024 06/13/2025 Co- teaching Services	5 Weekly	40 English Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30

Annual Review	Classified	08	teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 English Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	08	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Math Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	08	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Science Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	08	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Annual Review	Classified	08	Special Class - English 09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class	Physical Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Annual Review	Classified	08	Special Class - English 09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class	Occupational Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Special Class - Reading 09/04/2024 06/13/2025 15:1	5 Weekly	40 Reading Class	Physical Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Annual Review	Classified	08	Special Class - Reading 09/04/2024 06/13/2025 15:1	5 Weekly	40 Reading Class	Occupational Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Special Class - Math 09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Physical Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Annual Review	Classified	08	Special Class - Math 09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Occupational Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Special Class - Science 09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Physical Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Annual Review	Classified	08	Special Class - Science 09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Occupational Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Special Class - Social Studies 09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Physical Therapy	09/12/2024 06/13/2025	Individual	2 Weekly	30
Annual Review	Classified	08	Special Class - Social Studies 09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Occupational Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Special Class - English 09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Special Class - English 09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	08	Special Class - English 09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Special Class - English 09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	08	Special Class - English 09/04/2024 06/13/2025 15:1	5 Weekly	40 English Class	Behavior Intervention Services	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	08	Special Class - Reading 09/04/2024 06/13/2025 15:1	5 Weekly	40 Reading Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Special Class - Reading 09/04/2024 06/13/2025 15:1	5 Weekly	40 Reading Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30

Annual Review	Classified	08	Special Class - Reading	09/04/2024 06/13/2025 15:1	5 Weekly	40 Reading Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Special Class - Reading	09/04/2024 06/13/2025 15:1	5 Weekly	40 Reading Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	08	Special Class - Reading	09/04/2024 06/13/2025 15:1	5 Weekly	40 Reading Class	Behavior Intervention Services	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	08	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	08	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	08	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Behavior Intervention Services	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	08	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	08	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	08	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Behavior Intervention Services	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	08	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	08	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Annual Review	Classified	08	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Behavior Intervention Services	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	07	Resource Room Program	09/04/2024 06/13/2025 5:1	5 Every 2 weeks	40 Separate	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	07	Special Class	09/05/2024 06/27/2025 8:1+1	5 Weekly	330 Separate	Psychological Counseling Services	09/05/2024 06/27/2025	Individual	2 Weekly	30
Annual Review	Classified	07	Special Class	09/05/2024 06/27/2025 8:1+1	5 Weekly	330 Separate	Psychological Counseling Services	09/05/2024 06/27/2025	Small Group	1 Weekly	30
Annual Review	Classified	07	Special Class	09/05/2024 06/27/2025 8:1+1	5 Weekly	330 Separate	Parent Counseling and Training	09/05/2024 06/27/2025	Small Group	4 Yearly	60
Annual Review	Classified	02	Special Class	09/05/2024 06/27/2025 8:1+1	1 Daily	330 Separate	Occupational Therapy	09/05/2024 06/27/2025	Individual	1 Weekly	30
Annual Review	Classified	02	Special Class	09/05/2024 06/27/2025 8:1+1	1 Daily	330 Separate	Counseling	09/05/2024 06/27/2025	Individual	1 Weekly	30
Annual Review	Classified	02	Special Class	09/05/2024 06/27/2025 8:1+1	1 Daily	330 Separate	Counseling	09/05/2024 06/27/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Math Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Integrated	09/04/2024 06/13/2025	5 Weekly	40 Math Class	Physical Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30

Annual Review	Classified	08	Lo-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Science Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Science Class	Physical Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	08	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 English Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 English Class	Physical Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	08	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Annual Review	Classified	08	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class	Physical Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Amendment - Agreement No Meeting	Classified	06	Special Class 09/04/2024 06/13/2025 15:1+1	15 Weekly	40 Humanities Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Amendment - Agreement No Meeting	Classified	06	Special Class 09/04/2024 06/13/2025 15:1+1	15 Weekly	40 Humanities Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Amendment - Agreement No Meeting	Classified	06	Special Class 09/04/2024 06/13/2025 15:1+1	15 Weekly	40 Humanities Class	Itinerant Hearing Teacher	09/12/2024 06/13/2025	Individual	2 Weekly	30
Amendment - Agreement No Meeting	Classified	06	Special Class 09/04/2024 06/13/2025 15:1+1	15 Weekly	40 Humanities Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Amendment - Agreement No Meeting	Classified	06	Special Class - Math 09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Amendment - Agreement No Meeting	Classified	06	Special Class - Math 09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Amendment - Agreement No Meeting	Classified	06	Special Class - Math 09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Itinerant Hearing Teacher	09/12/2024 06/13/2025	Individual	2 Weekly	30
Amendment - Agreement No Meeting	Classified	06	Special Class - Math 09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Amendment - Agreement No Meeting	Classified	06	Special Class - Science 09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Amendment - Agreement No Meeting	Classified	06	Special Class - Science 09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Amendment - Agreement No Meeting	Classified	06	Special Class - Science 09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Itinerant Hearing Teacher	09/12/2024 06/13/2025	Individual	2 Weekly	30
Amendment - Agreement No Meeting	Classified	06	Special Class - Science 09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	03	Special Class 09/05/2024 06/27/2025 8:1+1	5 Weekly	330 Separate	Speech/Language Therapy	09/05/2024 06/27/2025	Individual	2 Weekly	30
Annual Review	Classified	03	Special Class 09/05/2024 06/27/2025 8:1+1	5 Weekly	330 Separate	Occupational Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Annual Review	Classified	03	Special Class 09/05/2024 06/27/2025 8:1+1	5 Weekly	330 Separate	Psychological Counseling Services	09/05/2024 06/27/2025	Small Group	1 Weekly	30
Reevaluation/Annual Review	Classified	08	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 English Class					
Reevaluation/Annual Review	Classified	08	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Math Class					
Reevaluation/Annual Review	Classified	08	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Science Class					
Reevaluation/Annual Review	Classified	08	Co-teaching Services Integrated 09/04/2024 06/13/2025	5 Weekly	40 Social					

Review			Co-teaching Services			Studies Class						
Annual Review	Classified	06	Special Class	09/05/2024 06/27/2025 8:1+1	1 Daily	330 All Academic Classes	Speech/Language Therapy	09/05/2024 06/27/2025	Individual	2 Weekly	30	
Annual Review	Classified	06	Special Class	09/05/2024 06/27/2025 8:1+1	1 Daily	330 All Academic Classes	Speech/Language Therapy	09/05/2024 06/27/2025	Small Group	1 Weekly	30	
Annual Review	Classified	06	Special Class	09/05/2024 06/27/2025 8:1+1	1 Daily	330 All Academic Classes	Psychological Counseling Services	09/05/2024 06/27/2025	Small Group	1 Weekly	30	
Annual Review	Classified	06	Special Class	09/05/2024 06/27/2025 8:1+1	1 Daily	330 All Academic Classes	Psychological Counseling Services	09/05/2024 06/27/2025	Individual	1 Weekly	30	
Reevaluation CPSE to CSE Transition	Classified	04/12/2024 Kdg.					Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30	
Reevaluation CPSE to CSE Transition	Classified	Kdg.					Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30	
Annual Review	Classified	04/15/2024 09	Special Class - English	09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30	
Annual Review	Classified	09	Special Class - English	09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60	
Annual Review	Classified	09	Special Class - English	09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Counseling	09/12/2024 06/13/2025	Individual	2 Monthly	30	
Annual Review	Classified	09	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30	
Annual Review	Classified	09	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60	
Annual Review	Classified	09	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025	Individual	2 Monthly	30	
Annual Review	Classified	09	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30	
Annual Review	Classified	09	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60	
Annual Review	Classified	09	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025	Individual	2 Monthly	30	
Annual Review	Classified	09	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30	
Annual Review	Classified	09	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60	
Annual Review	Classified	09	Special Class - Social Studies	09/04/2024 06/13/2025 15:1	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025	Individual	2 Monthly	30	
Annual Review	Classified	09	Special Class - Reading	09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30	
Annual Review	Classified	09	Special Class - Reading	09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60	
Annual Review	Classified	09	Special Class - Reading	09/04/2024 06/13/2025 15:1	5 Weekly	40 English / Language Arts Class	Counseling	09/12/2024 06/13/2025	Individual	2 Monthly	30	
Annual Review	Classified	09	Special Class	09/04/2024 06/13/2025 15:1	5 Bi-weekly	40 Science Class	Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30	
Annual Review	Classified	09	Special Class	09/04/2024 06/13/2025 15:1	5 Bi-weekly	40 Science Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60	
Annual Review	Classified	09	Special Class	09/04/2024 06/13/2025 15:1	5 Bi-weekly	40 Science Class	Counseling	09/12/2024 06/13/2025	Individual	2 Monthly	30	
Annual Review	Classified	12	Special Class	09/05/2024 06/27/2025 12:1+1	5 Weekly	330 Classroom	Speech/Language Therapy	09/05/2024 06/27/2025	Individual	2 Weekly	30	
Annual Review	Classified	12	Special Class	09/05/2024 06/27/2025 12:1+1	5 Weekly	330 Classroom	Speech/Language Therapy	09/05/2024 06/27/2025	Small Group	1 Weekly	30	
Annual Review	Classified	12	Special Class	09/05/2024 06/27/2025 12:1+1	5 Weekly	330 Classroom	Psychological Counseling Services	09/05/2024 06/27/2025	Small Group	1 Weekly	30	
Annual Review	Classified	12	Special Class	09/05/2024 06/27/2025 12:1+1	5 Weekly	330 Classroom	Parent Training	09/05/2024 06/27/2025	Individual	1 Weekly	60	

Annual Review	Classified	03	Class Special Class	09/05/2024 06/27/2025 8:1+1	5 Weekly	330 Classroom	Speech/Language Therapy	09/05/2024 06/27/2025 Individual	5 Weekly	30
Annual Review	Classified	03	Special Class	09/05/2024 06/27/2025 8:1+1	5 Weekly	330 Classroom	Occupational Therapy	09/05/2024 06/27/2025 Individual	2 Weekly	30
Annual Review	Classified	03	Special Class	09/05/2024 06/27/2025 8:1+1	5 Weekly	330 Classroom	Parent Counseling and Training	09/05/2024 06/27/2025 Individual	1 Monthly	60
Reevaluation/Annual Review	Classified	08	Special Class - Reading	09/04/2024 06/27/2025 15:1	5 Weekly	40 English / Language Arts Class				
Reevaluation/Annual Review	Classified	08	Special Class - English	09/04/2024 06/27/2025 15:1	5 Weekly	40 English / Language Arts Class				
Reevaluation/Annual Review	Classified	08	Special Class - Social Studies	09/04/2024 06/27/2025 15:1	5 Weekly	40 Social Studies Class				
Reevaluation/Annual Review	Classified	08	Integrated Co-teaching Services	09/04/2024 06/27/2025	5 Weekly	40 Science Class				
Reevaluation/Annual Review	Classified	08	Integrated Co-teaching Services	09/04/2024 06/27/2025	5 Weekly	40 Classroom				
Reevaluation/Annual Review	Classified	02	Special Class	09/05/2024 06/27/2025 8:1+1	5 Weekly	330 Classroom	Speech/Language Therapy	09/05/2024 06/27/2025 Individual	3 Weekly	30
Reevaluation/Annual Review	Classified	02	Special Class	09/05/2024 06/27/2025 8:1+1	5 Weekly	330 Classroom	Occupational Therapy	09/05/2024 06/27/2025 Individual	2 Weekly	30
Reevaluation/Annual Review	Classified	02	Special Class	09/05/2024 06/27/2025 8:1+1	5 Weekly	330 Classroom	Parent Counseling and Training	09/05/2024 06/27/2025 Individual	1 Monthly	60
Annual Review	Classified	03	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Classroom	Physical Therapy	09/05/2024 06/27/2025 Individual	2 Weekly	30
Annual Review	Classified	03	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Classroom	Occupational Therapy	09/05/2024 06/27/2025 Individual	2 Weekly	30
Annual Review	Classified	03	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Classroom	Speech/Language Therapy	09/05/2024 06/27/2025 Small Group	1 Weekly	30
Annual Review	Classified	03	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Classroom	Speech/Language Therapy	09/05/2024 06/27/2025 Individual	3 Weekly	30
Annual Review	Classified	04/16/2024 06	Special Class	09/04/2024 06/13/2025 15:1	15 Weekly	40 Humanities Class	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	06	Special Class	09/04/2024 06/13/2025 15:1	15 Weekly	40 Humanities Class	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	06	Special Class	09/04/2024 06/13/2025 15:1	15 Weekly	40 Humanities Class	Speech/Language Therapy	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	06	Special Class	09/04/2024 06/13/2025 15:1	15 Weekly	40 Humanities Class	Occupational Therapy	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	06	Special Class	09/04/2024 06/13/2025 15:1	15 Weekly	40 Humanities Class	Physical Therapy	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	06	Special Class	09/04/2024 06/13/2025 15:1	15 Weekly	40 Humanities Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	06	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	06	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	06	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	06	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Occupational Therapy	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	06	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Physical Therapy	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	06	Special Class - Math	09/04/2024 06/13/2025 15:1	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	06	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Counseling-Social Skills	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	06	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Annual Review	Classified	06	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Classified	06	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Occupational	09/12/2024 06/13/2025 Small	1 Weekly	30

			Class - Science	Class	Therapy	Group					
Annual Review	Classified	06	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Physical Therapy	09/12/2024 06/13/2025 Individual	1 Weekly	30	
Annual Review	Classified	06	Special Class - Science	09/04/2024 06/13/2025 15:1	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30	
Annual Review	Classified	01	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Separate	Parent Training	09/05/2024 06/27/2025 Individual	1 Monthly	60	
Annual Review	Classified	01	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Separate	Speech/Language Therapy	09/05/2024 06/27/2025 Individual	2 Weekly	30	
Annual Review	Classified	01	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Separate	Occupational Therapy	09/12/2024 06/13/2025 Individual	2 Weekly	30	
Annual Review	Classified	01	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Separate	Psychological Counseling	09/05/2024 06/27/2025 Individual	1 Weekly	30	
Annual Review	Classified	01	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Separate	Psychological Counseling	09/05/2024 06/27/2025 Small Group	1 Weekly	30	
Annual Review	Classified	01	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Separate	Parent Counseling and Training	09/05/2024 06/27/2025 Individual	1 Monthly	60	
Annual Review	Classified	01	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Separate	Counseling	09/05/2024 06/27/2025 Individual	1 Weekly	30	
Annual Review	Classified	01	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Separate	Counseling	09/05/2024 06/27/2025 Small Group	1 Weekly	30	
Annual Review	Classified	01	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Separate	Psychological Counseling	09/05/2024 06/27/2025 Individual	1 Weekly	30	
Annual Review	Classified	01	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Separate	Speech/Language Therapy	09/05/2024 06/27/2025 Individual	2 Weekly	30	
Annual Review	Classified	01	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Separate	Occupational Therapy	09/05/2024 06/27/2025 Individual	1 Weekly	30	
Annual Review	Classified	01	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Separate	Psychological Counseling	09/05/2024 06/27/2025 Small Group	2 Weekly	30	
Annual Review	Classified	04/17/2024 02	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 English / Language Arts Class					
Annual Review	Classified	02	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Reading Class					
Annual Review	Classified	02	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 English / Language Arts Class					
Annual Review	Classified	02	Integrated Co-teaching Services	09/04/2024 06/20/2025	5 Weekly	40 Math Class					
Annual Review	Classified	04/18/2024 12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 ELA Class					
Annual Review	Classified	12	Integrated Co-teaching Services	09/04/2024 06/13/2025	5 Weekly	40 Social Studies Class					
Annual Review	Classified	11	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Across School Setting	Speech/Language Therapy	09/05/2024 06/27/2025 1:1	3 Weekly	30	
Annual Review	Classified	11	Special Class	09/05/2024 06/27/2025 8:1+1	5 Weekly	330 Classroom	Applied Behavioral Analysis Services	09/05/2024 06/27/2025 Individual	3 Weekly	60	
Annual Review	Classified	11	Special Class	09/05/2024 06/27/2025 8:1+1	5 Weekly	330 Classroom	Speech/Language Therapy	09/05/2024 06/27/2025 Individual	3 Weekly	30	
Reevaluation/Annual Review	Classified	08	Special Class	09/05/2024 06/27/2025 8:1+1	5 Weekly	330 Classroom	Physical Therapy	09/05/2024 06/27/2025 Individual	1 Weekly	30	
Reevaluation/Annual Review	Classified	08	Special Class	09/05/2024 06/27/2025 8:1+1	5 Weekly	330 Classroom	Speech/Language Therapy	09/05/2024 06/27/2025 Individual	3 Weekly	30	
Annual Review	Classified	04	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Special Class	Psychological Counseling Services	09/05/2024 06/27/2025 Small Group	1 Weekly	30	
Annual Review	Classified	04	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Special Class	Occupational Therapy	09/05/2024 06/27/2025 Individual	2 Weekly	30	
Annual Review	Classified	04	Special Class	09/05/2024 06/27/2025 8:1:1	5 Weekly	330 Special Class	Speech/Language Therapy	09/05/2024 06/27/2025 Individual	4 Weekly	30	
Annual Review	Classified	04/19/2024 03	Integrated Co-teaching Services	09/04/2024 06/27/2025	5 Weekly	40 Classroom	Counseling	09/12/2024 06/13/2025 Small Group	1 Weekly	30	
Amendment -	Classified	05/02/2024 06	Special	09/04/2024 06/27/2025 15:1+1	15 Weekly	40 Humanities	Speech/Language	09/12/2024 06/13/2025 Small	2 Weekly	30	

Agreement No Meeting	Classified	06	Class	Class	Inerapy	Group					
Amendment - Agreement No Meeting	Classified	06	Special Class - Math	09/04/2024 06/27/2025 15:1	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Amendment - Agreement No Meeting	Classified	06	Special Class - Science	09/04/2024 06/27/2025 15:1	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Amendment - Agreement No Meeting	Classified	05/06/2024 01					Counseling-Social Skills	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Amendment - Agreement No Meeting	Classified	01					Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Amendment - Agreement No Meeting	Classified	01					Speech/Language Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Review	Declassified Support Services	02/27/2023 04	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Classroom					
Reevaluation/Annual Review	Declassified Support Services	02/27/2024 04	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Review	Declassified Support Services	04	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	80 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Review	Declassified Support Services	04	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Classroom	Occupational Therapy	09/12/2024 06/13/2025	Small Group	2 Weekly	30
Reevaluation/Annual Review	Declassified Support Services	04/03/2024 10									
Reevaluation Review	Declassified Support Services	04/04/2024 09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 English Class	Counseling	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation Review	Declassified Support Services	04/09/2024 09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 English / Language Arts Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Reevaluation Review	Declassified Support Services	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 English / Language Arts Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation Review	Declassified Support Services	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 English / Language Arts Class	Counseling	09/12/2024 06/13/2025	Individual	1 Monthly	30
Reevaluation Review	Declassified Support Services	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 English / Language Arts Class	Occupational Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation Review	Declassified Support Services	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Math Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Reevaluation Review	Declassified Support Services	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation Review	Declassified Support Services	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025	Individual	1 Monthly	30
Reevaluation Review	Declassified Support Services	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Math Class	Occupational Therapy	09/12/2024 06/13/2025	Small Group	1 Weekly	30
Reevaluation Review	Declassified Support Services	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Science Class	Parent Counseling and Training	09/12/2024 06/13/2025	Small Group	4 Yearly	60
Reevaluation Review	Declassified Support Services	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025	Individual	1 Weekly	30
Reevaluation Review	Declassified Support Services	09	Integrated Co-teaching Services	09/05/2024 06/27/2025	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025	Individual	1 Monthly	30

Reevaluation Review	Declassified Support Services	09	Integrated 09/05/2024 06/11/2025 Co-teaching Services	5 Weekly	40 Science Class	Occupational Therapy	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Reevaluation Review	Declassified Support Services	09	Integrated 09/05/2024 06/27/2025 Co-teaching Services	5 Weekly	40 Social Studies Class	Parent Counseling and Training	09/12/2024 06/13/2025 Small Group	4 Yearly	60
Reevaluation Review	Declassified Support Services	09	Integrated 09/05/2024 06/27/2025 Co-teaching Services	5 Weekly	40 Social Studies Class	Speech/Language Therapy	09/12/2024 06/13/2025 Individual	1 Weekly	30
Reevaluation Review	Declassified Support Services	09	Integrated 09/05/2024 06/27/2025 Co-teaching Services	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025 Individual	1 Monthly	30
Reevaluation Review	Declassified Support Services	09	Integrated 09/05/2024 06/27/2025 Co-teaching Services	5 Weekly	40 Social Studies Class	Occupational Therapy	09/12/2024 06/13/2025 Small Group	1 Weekly	30
Reevaluation/Annual Review	Declassified Support Services	04/15/2024 12				Counseling	09/12/2024 06/13/2025 Individual	1 Weekly	30
Annual Review	Exited	04/03/2024 09	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Every 2 weeks	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025 Individual	1 Monthly	30
Annual Review	Exited	09	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Every 2 weeks	40 Science Class	Counseling	09/12/2024 06/13/2025 Individual	1 Monthly	30
Annual Review	Exited	09	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Every 2 weeks	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025 Individual	1 Monthly	30
Annual Review	Exited	09	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Every 2 weeks	40 Math Class	Counseling	09/12/2024 06/13/2025 Individual	1 Monthly	30
Annual Review	Exited	09	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Weekly	40 English / Language Arts Class	Speech/Language Therapy	09/12/2024 06/13/2025 Individual	1 Monthly	30
Annual Review	Exited	09	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Weekly	40 English / Language Arts Class	Counseling	09/12/2024 06/13/2025 Individual	1 Monthly	30
Annual Review	Exited	09	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Weekly	40 Social Studies Class	Speech/Language Therapy	09/12/2024 06/13/2025 Individual	1 Monthly	30
Annual Review	Exited	09	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Weekly	40 Social Studies Class	Counseling	09/12/2024 06/13/2025 Individual	1 Monthly	30
Annual Review	Exited	09	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Weekly	40 Science Class	Speech/Language Therapy	09/12/2024 06/13/2025 Individual	1 Monthly	30
Annual Review	Exited	09	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Weekly	40 Science Class	Counseling	09/12/2024 06/13/2025 Individual	1 Monthly	30
Annual Review	Exited	09	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Weekly	40 Math Class	Speech/Language Therapy	09/12/2024 06/13/2025 Individual	1 Monthly	30
Annual Review	Exited	09	Integrated 09/04/2024 06/13/2025 Co-teaching Services	5 Weekly	40 Math Class	Counseling	09/12/2024 06/13/2025 Individual	1 Monthly	30

Interoffice Memorandum

TO: *Dr. Scott T. O'Brien, Superintendent*

FROM: *Kristen White, Executive Director of Pupil Personnel Services*

DATE: *5/21/2024*

RE: *Board Action Sheets*

Below please find the schedule to be approved at the 5/21/2024 Board of Education meeting:

SCHEDULE- B 5/21/2024	
Date	Location
<i>1/9/2024</i>	<i>CPSE Committee</i>
<i>2/16/2024</i>	<i>CPSE/CSE Transition</i>
<i>3/8/2024</i>	<i>CPSE/CSE Transition</i>
<i>3/11/2024</i>	<i>CPSE Committee</i>
<i>3/14/2024</i>	<i>CPSE/CSE Transition</i>
<i>3/15/2024</i>	<i>CPSE Committee</i>
<i>3/18/2024</i>	<i>CPSE/CSE Transition</i>
<i>3/21/2024</i>	<i>CPSE/CSE Transition</i>
<i>3/25/2024</i>	<i>CPSE Committee</i>
<i>3/26/2024</i>	<i>CPSE Committee</i>
<i>3/27/2024</i>	<i>CPSE Amendment</i>
<i>4/3/2024</i>	<i>CPSE/CSE Committee</i>
<i>4/4/2024</i>	<i>CPSE Amendment</i>
<i>4/11/2024</i>	<i>CPSE Committee</i>
<i>4/17/2024</i>	<i>CPSE Committee</i>

Dr. Scott T. O'Brien-Board Action Sheets/kao

BOE ACTION Summary DATE? DECISION?

<u>CMA BOE Date</u>	<u>CR Doc Committee Responsible</u>	<u>CMA Reason</u>	<u>Decision/Status</u>	<u>CMA Date</u>	<u>CR Expected Grade</u>	<u>CR Next Recommended School (>2010-11 SY)</u>	<u>Program</u>	<u>Program Start</u>	<u>Program End</u>	<u>Program Ratio</u>	<u>Program Frequency</u>	<u>Program Period</u>	<u>Program Duration</u>	<u>Program Location</u>	<u>Related Service</u>	<u>RS Start</u>	<u>RS End</u>	<u>RS Ratio</u>	<u>RS Frequency</u>	<u>RS Period</u>	<u>RS Duration</u>
05/21/2024	CPSE	Initial Eligibility Determination Meeting	Classified Preschool	02/16/2024	Preschool		Special Class	03/04/2024	06/26/2024	6:1:3.5	5 Weekly		300 Classroom	Speech/Language Therapy	03/04/2024	06/26/2024	Individual	3 Weekly		30	
		Initial Eligibility Determination Meeting	Classified Preschool		Preschool		Special Class	03/04/2024	06/26/2024	6:1:3.5	5 Weekly		300 Classroom	Occupational Therapy	03/04/2024	06/26/2024	Individual	3 Weekly		30	
		Initial Eligibility Determination Meeting	Classified Preschool		Preschool		Special Class	03/04/2024	06/26/2024	6:1:3.5	5 Weekly		300 Classroom	Physical Therapy	03/04/2024	06/26/2024	Individual	3 Weekly		30	
		Initial Eligibility Determination Meeting	Classified Preschool	03/11/2024	Preschool		Special Class in an Integrated Setting	03/25/2024	06/21/2024	12:1+2	5 Weekly		300 Classroom	Physical Therapy	03/25/2024	06/21/2024	Individual	2 Weekly		30	
		Initial Eligibility Determination Meeting	Classified Preschool		Preschool		Special Class in an Integrated Setting	03/25/2024	06/21/2024	12:1+2	5 Weekly		300 Classroom	Speech/Language Therapy	03/25/2024	06/21/2024	Individual	3 Weekly		30	
		Initial Eligibility Determination Meeting	Classified Preschool		Preschool		Special Class in an Integrated Setting	03/25/2024	06/21/2024	12:1+2	5 Weekly		300 Classroom	Occupational Therapy	03/25/2024	06/21/2024	Individual	2 Weekly		30	
		Program Review	Classified Preschool	03/14/2024	Preschool		Special Class	09/06/2023	06/26/2024	12:1+2	5 Weekly		300 Classroom	Speech/Language Therapy	09/06/2023	06/26/2024	Individual	3 Weekly		30	
		Program Review	Classified Preschool		Preschool		Special Class	09/06/2023	06/26/2024	12:1+2	5 Weekly		300 Classroom	Parent Counseling and Training	09/06/2023	06/26/2024	Individual	1 Monthly		60	
		Program Review	Classified Preschool		Preschool		Special Class	09/06/2023	06/26/2024	12:1+2	5 Weekly		300 Classroom	Occupational Therapy	03/25/2024	06/26/2024	Individual	4 Weekly		30	
		Initial Eligibility Determination Meeting	Classified Preschool	03/15/2024	Preschool									Physical Therapy	04/02/2024	06/21/2024	Individual	2 Weekly		30	
		Initial Eligibility Determination Meeting	Classified Preschool	03/26/2024	Preschool		Special Class in an Integrated Setting	04/08/2024	06/21/2024	12:1+2	5 Weekly		300 Classroom	Speech/Language Therapy	04/08/2024	06/21/2024	Individual	3 Weekly		30	
		Initial Eligibility Determination Meeting	Classified Preschool		Preschool		Special Class in an Integrated Setting	04/08/2024	06/21/2024	12:1+2	5 Weekly		300 Classroom	Occupational Therapy	04/08/2024	06/21/2024	Individual	2 Weekly		30	
		Initial Eligibility Determination Meeting	Classified Preschool		Preschool		Special Class in an Integrated Setting	04/08/2024	06/21/2024	12:1+2	5 Weekly		300 Classroom	Physical Therapy	04/08/2024	06/21/2024	Individual	2 Weekly		30	
		Initial Eligibility Determination Meeting	Classified Preschool		Preschool		Special Class in an Integrated Setting	04/08/2024	06/21/2024	12:1+2	5 Weekly		300 Classroom	Parent Counseling and Training	04/08/2024	06/21/2024	Individual	1 Monthly		60	
		Initial Eligibility Determination Meeting	Classified Preschool		Preschool									Speech/Language Therapy	05/01/2024	06/21/2024	Individual	2 Weekly		30	
		Amendment	Classified Preschool	03/27/2024	Preschool		Special Education Itinerant Services	04/02/2024	06/21/2024	1:1	3 Weekly		60 Home	Speech/Language Therapy	01/29/2024	06/21/2024	Individual	3 Weekly		30	
		Amendment	Classified Preschool		Preschool		Special Education Itinerant Services	04/02/2024	06/21/2024	1:1	3 Weekly		60 Home	Occupational Therapy	02/08/2024	06/21/2024	Individual	2 Weekly		30	
		Amendment	Classified Preschool	04/04/2024	Preschool		Special Education Itinerant	04/08/2024	06/21/2024	1:1	3 Weekly		60 Home	Speech/Language Therapy	01/29/2024	06/21/2024	Individual	2 Weekly		30	

Initial Eligibility Determination Meeting	Classified Preschool/No Services Continued EI	03/25/2024 Preschool	Services Special Class in an Integrated Setting	03/25/2024 06/21/2024 12:1+2	5 Weekly	300 Classroom Speech/Language 03/25/2024 06/21/2024 Individual Therapy	2 Weekly	30
Initial Eligibility Determination Meeting	Classified Preschool/No Services Continued EI	03/26/2024 Preschool	Special Class in an Integrated Setting	03/26/2024 06/21/2024 12:1+2	5 Weekly	300 Classroom Speech/Language 03/26/2024 06/21/2024 Individual Therapy	3 Weekly	30
Initial Eligibility Determination Meeting	Ineligible	04/11/2024 Preschool						

CR Doc Committee Responsible Sub Total: 21

Total Records: 21
Total Students: 11

HOLD TO LIGHT TO VIEW TRUE WATERMARK IN PAPER. HEAT SENSITIVE RED LOCK DISAPPEARS WHEN HEATED.

13426

M&T Bank

301 ROUTE 25A
MILLER PLACE, NY 11764

SOUND BEACH MUSIC INC

66 ECHO AVENUE
MILLER PLACE, NY 11764

10-2/220

4/1/2024

PAY TO THE
ORDER OF

Rocky Point Schools

\$ **500.00

Five Hundred and 00/100*****

DOLLARS

Rocky Point UFSD
90 Rocky Point-Yaphank Rd
Rocky Point, NY 11778

MEMO

\$250.00 for girl/\$250 for boy/music dept



Eija Golda
AUTHORIZED SIGNATURE

Details on back
Security Features Included

SOUND BEACH MUSIC INC

Rocky Point Schools

4/1/2024

13426

500.00

MTB

\$250.00 for girl/\$250 for boy/music dept

500.00

Susan Y Sullivan
Roger D Sullivan

9705

50-7044/2219

5/7 20 24

Pay to the
Order of

Rocky Point Schools

\$1000.00

one thousand and 00/100

Dollars

Security features
are included.
Check on back.

WEBSTER BANK
325 Route 25A
Rocky Point, NY 11778

For Rita Sullivan scholarship Susan Y Sullivan

CERTIFICATION OF COMPLIANCE WITH THE IRAN DIVESTMENT ACT

As a result of the Iran Divestment Act of 2012 (the "Act"), chapter 1 of the 2012 Laws of New York, a new provision has been added to Stat Finance Law (SFL) § 165-a and New York General Municipal Law § 103-g, both effective April 12, 2012. Under the Act, the Commissioner of the Office of General Services (OGS) will be developing a list of "persons" who are engaged in "investment activities in Iran" (both are defined terms in the law) (the "Prohibited Entities List"). Pursuant to SFL § 165-a(3)(b), the initial list is expected to be issued no later than 120 days after the Act's effective date at which time it will be posted on the OGS website.

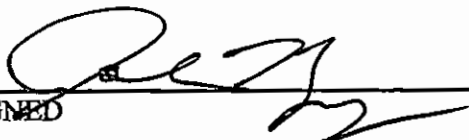
By submitting a bid in response to this solicitation or by assuming the responsibility of a Contract awarded hereunder, each Bidder/Contractor, any person signing on behalf of any Bidder/Contractor and any assignee or subcontractor and, in the case of a joint bid, each party thereto, certifies, under penalty of perjury, that once the Prohibited Entities List is posted on the OGS website, that to the best of its knowledge and belief, that each Bidder/Contractor and any subcontractor or assignee is not identified on the Prohibited Entities List created pursuant to SFL §165-a(3)(b).

Additionally, Bidder/Contractor is advised that once the Prohibited Entities List is posted on the OGS Website, any Bidder/Contractor seeking to renew or extend a Contract or assume the responsibility of a Contract awarded in response to this solicitation must certify at the time the Contract is renewed, extended or assigned that it is not included on the Prohibited Entities List.

During the term of the Contract, should the School District receive information that a Bidder/Contractor is in violation of the above-referenced certification, the School District will offer the person or entity an opportunity to respond. If the person or entity fails to demonstrate that he/she/it has ceased engagement in the investment which is in violation of the Act within 90 days after the determination of such violation, then the School District shall take such action as may be appropriate including, but not limited to, imposing sanctions, seeking compliance, recovering damages or declaring the Bidder/Contractor in default. The School District reserves the right to reject any bid or request for assignment for a Bidder/Contractor that appears on the Prohibited Entities List prior to the award of a contract and to pursue a responsibility review with respect to any Bidder/Contractor that is awarded a contract and subsequently appears on the Prohibited Entities List.

I, John Kenny, being duly sworn, deposes and says that he/she is the President of the New York Trenchless Inc. Corporation and that neither the

Bidder/Contractor nor any proposed subcontractor is identified on the Prohibited Entities List.


SIGNED

SWORN to before me this 23rd day of April

2024
Notary Public: Gina Locke

GINA A. LOCKE NOTARY PUBLIC, STATE OF NEW YORK Registration No. 01LO6057960 Qualified in Suffolk County Commission Expires Apr. 30, 20 <u>27</u>
--



Rocky Point Friends of Music

Post Office Box 5205
Rocky Point, New York 11778

April 12, 2024

To the Rocky Point Board of Education,

Please accept a donation of \$5,113.80 to the Rocky Point Music Department (account A.2138-500-03-3120). The donation is to pay for new electronic equipment for the Middle School Instrumental Music Room (Room 120) and the Joseph A. Edgar Musical Sound System.

Items to be purchased:

- 2 JBL 8" 70V Ctrl 29 In/Outdoor AV Speaker, Black
- 2 MTC29UBBK JBL U Bracket for Control 29AV
- 1 XLS2002 Crown 650W 2-ch XLS DC2 Power Amp
- 1 PL8C Furman 8+1 Outlet 15A Rack Power Cond w/Lt
- 1 RM169 Rolls 6-ch Rackmount Mixer w/BT
- 1 BDMP1 TASCAM Blu-ray Player 1RU Rackmount
- 1 GRW2009508 Gator 9U Hinged Wall Rack w/Steel
- 1 SHELF1SLD Gator GE-SHLF-SLD-1U Sliding Shelf
- 2 XLR3 Pro Co 3' XLRf-XLRM Excellines Cable
- 1 HRR003X2 Hosa 3' RCAMx2-RCAMx2 Pro Cable
- 2 XLR3 Pro Co 3' XLRf-XLRM Excellines Cable
- 2 BP3 Pro Co 3' QTRSM-QTRSM Cable \$28.95
- 1 NX46000 Behringer 6000W 4-ch NX Power Amp
- 4 S12NQ6 Pro Co 6' spkON-QTSJ 12ga Speaker Cable
- 2 BP3 Pro Co 3' QTRSM-QTRSM Cable
- 1 NX3000 Behringer 3000W 2-ch NX Power Amp
- 2 S12NQ25 Pro Co 25' spkON-TS 12ga Speaker Cable

Thank you for your consideration,

The Rocky Point Friends of Music

ROCKY POINT FRIENDS OF MUSIC
PO BOX 5205
ROCKY POINT
NEW YORK 11778

270
1-1367/260
876

3-6-2024
Date

Pay to the
Order of

Rocky Point Schools

\$ 5,113.80

Five thousand one hundred thirteen and ⁸⁰/₁₀₀

Dollars



Photo
Safe
Deposit®
Circle on back



America's Most Convenient Bank®

For Donation - Music Department

Marie Zippel

MP

Sweetwater

Music Education Technology Division

5501 US HWY 30 W
Fort Wayne, IN 46818
(800) 822-6752
Sweetwater.com

Quote Number 8733137
Quote Date 3/6/24
Delivery Method FedEx Ground (Business)
Customer Number 935750

Quote To: Accounts Payable
Rocky Point UFSD
90 Rocky Point Yaphank Rd
Rocky Point, NY 11778

Ship to: ATTN: Amy Schecher
Rocky Point High School
82 Rocky Point Yaphank Rd
Rocky Point, NY 11778

Qty.	Item	Description	Retail Price	Your Price	Total
SPEAKERS & AMPLIFIER					
2	Control29AVB	JBL 8" 70V Ctrl 29 In/Outdoor AV Spkr, Blk (ea)	\$588.21	\$465.00	\$930.00
2	MTC29UBBK	JBL U Bracket for Control 29AV (ea)	\$97.95	\$97.95	\$195.90
1	XLS2002	Crown 650W 2-ch XLS DC2 Power Amp	\$830.36	\$659.00	\$659.00
POWER CONDITIONER					
1	PL8C	Furman 8+1 Outlet 15A Rk Pwr Cond w/Lt	\$369.95	\$324.95	\$324.95
MIXER					
1	RM169	Rolls 6-ch Rkmt Mixer w/BT	\$279.00	\$219.00	\$219.00
CD PLAYER					
1	BDMP1	TASCAM Blu-ray Player 1RU Rackmt	\$599.00	\$499.00	\$499.00
WALL RACK CASE					
1	GRW2009508	Gator 9U Hinged Wall Rk w/Steel	\$1,039.99	\$649.99	\$649.99
1	SHELF1SLD	Gator GE-SHLF-SLD-1U Sliding Shelf	\$209.99	\$129.99	\$129.99
CABLES					
2	XLR3	Pro Co 3' XLR-F-XLR-M Excellines Cable	\$32.84	\$21.99	\$43.98
1	HRR003X2	Hosa 3' RCAMx2-RCAMx2 Pro Cable	\$37.95	\$24.95	\$24.95
•QUOTE 9566017•					
From Yamaha Stereo Out					
1	XLR3-2Pk	3' XLR-F-XLR-M Excellines Cable 2pk			
2	XLR3	Pro Co 3' XLR-F-XLR-M Excellines Cable	\$34.95	\$23.50	\$47.00
1	BP3-2Pk	3' QTRSM-QTRSM Cable 2-pk			
2	BP3	Pro Co 3' QTRSM-QTRSM Cable	\$28.95	\$17.00	\$34.00
1	NX46000	Behringer 6000W 4-ch NX Power Amp	\$679.00	\$679.00	\$679.00
4	S12NC6	Pro Co 6' spkON-QTSJ 12ga Spkr Cable	\$70.95	\$35.99	\$143.96

Continued on page 2...

Sweetwater

Music Education Technology Division

5501 US HWY 30 W
 Fort Wayne, IN 46818
 (800) 822-6752
 Sweetwater.com

Quote Number 8733137
Quote Date 3/6/24
Delivery Method FedEx Ground (Business)
Customer Number 935750

Quote To: Accounts Payable
 Rocky Point UFSD
 90 Rocky Point Yaphank Rd
 Rocky Point, NY 11778

Ship to: ATTN: Amy Schecher
 Rocky Point High School
 82 Rocky Point Yaphank Rd
 Rocky Point, NY 11778

Qty.	Item	Description	Retail Price	Your Price	Total
1	BP3-2Pk	3' QTRSM-QTRSM Cable 2-pk			
2	BP3	Pro Co 3' QTRSM-QTRSM Cable	\$28.95	\$17.00	\$34.00
1	NX3000	Behringer 3000W 2-ch NX Power Amp	\$379.00	\$379.00	\$379.00
2	S12NQ25	Pro Co 25' spkON-TS 12ga Spkr Cable	\$115.56	\$60.04	\$120.08

Tax Exempt Certificate

Terms: Net 30 Days

EXCLUSIVE 'TOTAL CONFIDENCE COVERAGE' FREE TWO YEAR WARRANTY
 (SOFTWARE, CONSUMABLES AND APPLE PRODUCTS DO NOT QUALIFY FOR TCC)
 **UNLIMITED TECHNICAL SUPPORT PROVIDED BY DEDICATED IN-HOUSE STAFF
 EXCLUSIVE TO SWEETWATER CUSTOMERS.
 ***IN-HOUSE FACTORY AUTHORIZED SERVICE AND REPAIR.
 ****MOST PREPAID ORDERS QUALIFY FOR FREE SHIPPING AT STANDARD
 DISCOUNTS.
 SPECIAL ORDERS, ORDERS WITH OPEN BILLING TERMS (PURCHASE ORDERS),
 DO NOT QUALIFY FOR FREE S&H.
 PLEASE SEE THE LINK BELOW FOR DETAILS. [HTTPS://WWW.SWEETWATER.COM/
 ABOUT/FREE-SHIPPING/](https://www.sweetwater.com/about/free-shipping/)
 *****SIGNED PURCHASE ORDER REQUIRED FOR NET30 TERMS
 *****BAND BOOSTERS AND PTA/PTO GROUPS, PLEASE SEND A CHECK WITH
 ORDERS OR CALL WITH CREDIT CARD.

Continued on page 3...

Sweetwater

Music Education Technology Division

5501 US HWY 30 W
Fort Wayne, IN 46818
(800) 822-6752
Sweetwater.com

Quote Number 8733137
Quote Date 3/6/24
Delivery Method FedEx Ground (Business)
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Quote To: Accounts Payable
Rocky Point UFSD
90 Rocky Point Yaphank Rd
Rocky Point, NY 11778

Ship to: ATTN: Amy Schecher
Rocky Point High School
82 Rocky Point Yaphank Rd
Rocky Point, NY 11778

Qty.	Item	Description	Retail Price	Your Price	Total
		Items listed on previous page(s)			

Subtotal:	\$5,113.80
Shipping & Handling:	\$252.35
Free Shipping Promo:	-\$252.35
Tax:	\$0.00
Total:	\$5,113.80

Your Sales Engineer Is William Roach:

If you ever have any questions or concerns, please do not hesitate to contact me at (800) 222-4700 x3888 or william_roach@sweetwater.com.

24-hour support is also available at Sweetwater.com/SweetCare, or with our in-house SweetCare Center by phone at (800) 222-4700 (M - F 9am - 6pm, Sat 9am - 5pm).

Sweetwater's Return Guidelines:

It's our goal to earn your trust and create a relationship with you for the long term by standing behind what we sell. We promise to deal with you fairly and reasonably; we hope you will be fair and reasonable with us as well. So, if for some reason you are not satisfied with your purchase, we will gladly accept your timely return of eligible items.

To make a return, simply contact your Sales Engineer to start the process.

For additional information on returns, please visit Sweetwater.com/help.

CASH ONLY IF ALL CheckLock™ SECURITY FEATURES LISTED ON BACK INDICATE NO TAMPERING OR COPYING

MUNISTAT SERVICES INC
12 Roosevelt Avenue
Port Jefferson Station, NY 11776

BANK OF AMERICA, NA
1-32/210

10555

4/25/2024

PAY TO THE ORDER OF Rocky Point UFSD Scholarship Fund ;

\$ **250.00

Two Hundred Fifty and 00/100***** DOLLARS

PROTECTED AGAINST FRAUD

© 2021 INTUIT INC. 1-800-353-8810



MEMO

Class of 2024



[Handwritten Signature]
MP



Details on Back Intuit® CheckLock™ Secure Check

MUNISTAT SERVICES INC

Rocky Point UFSD Scholarship Fund
Advertisement

4/25/2024

10555

250.00

Munsvcs Chkng

Class of 2024

250.00

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



12 Roosevelt Avenue
Port Jefferson Station, New York 11776

www.munistat.com

April 30, 2024

Christopher A. Van Cott
Assistant Superintendent for Business
Rocky Point Union Free School District
170 Route 25A
Rocky Point, New York 11778

Dear Christopher:

Enclosed please find our check in the amount of \$250 to be deposited in the General Scholarship Fund of the School District. We ask that this contribution be granted in the name of Munistat Services, Inc. to a deserving student of the current graduating class who is pursuing a course of study at a college or university, such student to be selected by the appropriate administrators and/or board members of the School District.

It has been a pleasure and an honor to have established and maintained a professional relationship with the School District and we look forward to continuing our work together in the years to come.

Very truly yours,

Michael J. Loguercio
President

Enclosure

cc: Dr. Scott T. O'Brien

GRANT AGREEMENT

Citizens Campaign Fund for the Environment (“CCFE”) is a 501(c)(3) environmental organization providing sound scientific information and research to support prudent governmental policies and environmental practices and promoting environmental justice and environmental education to benefit residents of New York, Connecticut, and the Nation.

Rocky Point High School (“Grantee”) is a NYS certified school. The Rocky Point Union Free School District fosters positive relationships in a nurturing and inclusive learning environment and provides meaningful opportunities for students to achieve their full potential. We develop skills in creativity, problem-solving, critical thinking, and empathetic leadership to serve our communities. The Rocky Point Union Free School District creates large school opportunities with a small town feel where every student can realize their educational and personal goals and become productive members of the local and global society.

CCFE is pleased to award Rocky Point High School a grant of two thousand five hundred dollars (“Grant Funds”). The purpose of this grant agreement (“Agreement”) is to set forth the terms and conditions under which CCFE is able to make this award. Rocky Point High School is responsible for:

1. Participate in the Long Island High School Sound Summit

Students and facilities will work with Citizens Campaign for the Environment to teach students about the Long Island Sound Study and the challenges of Long Island Sound protection and restoration. Students will develop project/projects that seek to advance the restoration of the Sound. Students will present their projects at the Long Island Sound High School Summit in May 2024. As part of this project Schools will be responsible for:

- a. Providing a budget of how the funds will be allocated
- b. Providing CCFE a list of participating students and a 3 sentence summary of each project
- c. Providing CCFE action photos of students conducting their projects
- d. Providing CCFE copies of anything that is developed as a result of the projects (including video, posters, research papers, etc)

The Grant Funds shall be used solely and exclusively for the purposes and in the manner specified in the Long Island Sound Futures Fund Grant Proposal. Grant Funds are to be used in accordance with all federal and state laws relevant to non-profit organizations. Any substantial variation in the use of the Grant Funds must be agreed to in writing before the funds are utilized for the revised purpose. No part of the Grant Funds shall be used to attempt to influence legislation or the outcome of any specific public election; to carry on, directly or indirectly, any voter registration drive; or to make payments to an individual, except for compensation or expense reimbursement to employees of, or consultants to, Grantee and within the scope of their employment or engagement.

1. Term. The duration of the grant period shall begin January 1, 2024 and extend through December 31, 2024 (“Grant Period”).
2. Payment. CCFE will pay Grantee \$2,500 upon execution of this agreement and CCFE’s approval of Grantee’s budget.
3. Report. Grantee will be responsible for all paperwork regarding final reports and interim reports on the project.
4. Miscellaneous:
 - a. Lobbying. No part of these funds may be used for grassroots lobbying.

- b. Tax-Exempt Status. Grantee will not utilize the grant to engage in any activity that jeopardizes CCFE's status as a charity tax-exempt under section 501(c)(3) of the Code. For example, Grantee will not use this grant to intervene in any election or support or oppose a candidate for public office.
- c. Termination. CCFE may terminate this agreement immediately upon written notice (including email) should Grantee fail to use funds in compliance with this grant, or if Grantee's charitable 501(c)(3) tax exempt status is revoked by the IRS.
- d. Intellectual Property. Grantee and CCFE agree that all copyright and other interests in materials produced as a result of this grant shall be owned by Grantee. To ensure the widest possible distribution of such materials and ensure that they remain generally available to the public, the Grantee shall, and shall cause any individuals who may have some interest to grant, and hereby grants to CCFE a non-exclusive, transferable, perpetual, irrevocable, royalty-free, paid-up, worldwide license to use or publish the materials or other work products arising resulting from Grantee's use of the Funds.
- e. Right to Publish. Grantee hereby grants CCFE a non-exclusive, unlimited license to distribute, copy, modify, display, or otherwise use any deliverable it creates under this agreement, including but not limited to the alerts, articles, press releases, and reports.
- f. Approvals. CCFE will, at all times, maintain control over the content, creative design, schedule, recipient lists, and volumes of its communications.
- g. Independent Contractor Status. Nothing in this agreement shall create any employment, joint venture, agency, or partnership relationship between the parties.
- h. Change in status. Grantee and CCFE shall notify the other within 72 hours if: (i) its organizational mission changes; (ii) staff changes may affect the Program's scope or outcome; or (iii) changes in funding may affect the Program.
- i. No assignment. Grantee may not assign, or otherwise transfer, its rights or delegate any of its obligations under this grant without prior written approval from CCFE.

EXECUTION BY Citizens Campaign Fund for the Environment.

Executed this _____ day of _____, 2024.

Name: Adrienne Esposito
Title: Executive Director

EXECUTION BY Rocky Point High School

By signature below, the Grantee acknowledges that it accepts and agrees to be bound by this Agreement.

Executed this 21st day of May, 2024.

Name: Jessica Ward
Title: President, Board of Education

CASH ONLY IF ALL CheckLock™ SECURITY FEATURES LISTED ON BACK INDICATE NO TAMPERING OR COPYING

O OHIOPLYE PRINTS, INC.
410 DINNERBELL RD
OHIOPLYE, PA 15470-1002

WesBanco Bank, Inc.
69-3/434

50554

4/26/2024

PAY TO THE ORDER OF Rocky Point Union Free School District

\$ **33.66

Thirty-Three and 66/100 ***** DOLLARS

PROTECTED AGAINST FRAUD

© 2021 INTUIT INC. # 2117 1-800-433-8610



Rocky Point Union Free School District
362484003437
Greg Hilton
90 Rocky Point Yaphak Road
Rocky Point, NY 11778



Greg Hilton



MEMO

Details on Back Intuit® CheckLock™ Secure Check

Frequently Asked Questions

Who is Ohiopyle Prints, Inc.?

Ohiopyle Prints, Inc. (OP), established in 1981, is the leading manufacturer and supplier of school spirit wear to grocery and pharmacy retailers. It is our desire, as well as the desire of our retail partners, to help financially support schools in the neighborhoods in which we work and live.

Why should I sign this non-exclusive agreement?

A signed licensing agreement helps inform school administrators, faculty, clubs and organizations of the relationship between OP and your school as well as how the program works.

Most colleges have licensing agreements to ensure they receive all royalties due on products bearing their Marks and can take action on those who do not have rights to use their Marks. With a signed agreement, we will provide you with a listing of the retailers carrying your schools products we manufacture with your Marks in addition to the royalties we pay.

We believe the retail sales of school products will continue to grow and increase your need to have a signed agreement just like colleges.

How do you determine the royalty payment and how often do you pay?

The royalties are calculated on 7% of the wholesale cost invoiced to our retail partners in your area. We will report and make payment to your school 30 days after the end of each quarter.

Does cashing this check obligate our school to anything?

No. You can cancel the program at any time.

What can our school use this money for?

Royalty checks are a general fund and may be used any way your school sees fit.

Will our school continue to receive royalty payments from OP if we do not sign an agreement?

Yes, unless we are instructed otherwise, we will continue to sell products using your school Marks to local retailers and send a voluntary royalty payment to your school.

Does our school have to do anything once we sign the agreement?

No. OP does everything for you. We do the selling, manufacturing, shipping, billing and royalty payments.

Does signing an agreement affect our booster clubs?

No. The licensing agreement does not affect or prevent your school organizations or booster clubs from selling or distributing products.

Can our school and booster clubs buy direct from OP?

Yes! We encourage you to order direct from OP. We offer a wide variety of trendy, high quality products. Please call 1-800-365-7365 for information and pricing. No royalties are collected or paid on products sold direct to schools or booster clubs.

Are there any liability risks for our school because of a signed agreement with OP?

No. OP assumes all liability for their products that are sold to retailers. OP meets or exceeds all requirements set by the Consumer Products Safety Improvement Act (CPSIA) for Lead, Phthalates and other harmful substances.

What are school Marks?

'Marks' means all of your school's service Marks, school name, nickname, mascot and related designs, logo graphics and symbols.

Will our school retain the rights to our Marks if we sign an agreement?

Yes. By signing the licensing agreement you have given OP the permission to use your Marks but have not given us the rights to your Marks.

Can our school terminate the agreement with OP?

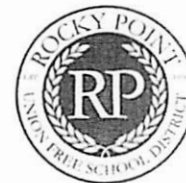
Yes. You can terminate this agreement at any time and for any reason. Upon written notification to OP, we will discontinue all manufacturing but shall retain the right to sell any remaining inventory.

How do I identify OP products in my local retailers?

As of 2019, we have updated our product branding to reflect our company name, Ohiopyle Prints Inc, and honor our heritage with a new logo worded "Ohiopyle 81". You may find product in retail locations from past years containing the trademarked name "MyTown Originals®". All of our products contain a UPC code beginning with 7-49145.



ROCKY POINT PUBLIC SCHOOLS



SURPLUS EQUIPMENT DISPOSAL

School: HS

Department: B+G

Name: John D. Reccis

Description	Model#/Serial#	Property Tag #	Quantity	Reason for Disposal
15 Ceramic Stools	—	—	15	out lived it's usefulness
Small Art Tables	—	—	30	" " " "

Requestor Signature *John D. Reccis*

Date: 4/12/24

Assistant Superintendent Signature *[Signature]*

Date: 4/15/24

ROCKY POINT PUBLIC SCHOOLS



SURPLUS EQUIPMENT DISPOSAL

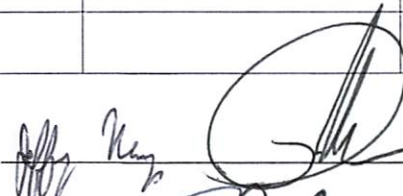
School: _____

Department: Grounds

Name: Jeff Niemczyk

Description	Model#/Serial#	Property Tag #	Quantity	Reason for Disposal
Old Athletic Gator 4x2	John Deere GATOR 4x2		1	Broken
Red Trailer	2001/1996 Trailer		1	obsolete

Requestor Signature

 4.11.24

Date: 4/10/24

Assistant Superintendent Signature



Date: 4/12/24

ROCKY POINT PUBLIC SCHOOLS



SURPLUS EQUIPMENT DISPOSAL

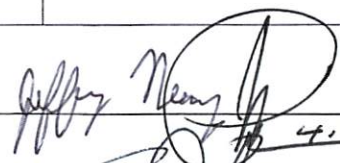
School: _____

Department: Grounds

Name: Jeff Nienczyt


Description	Model#/Serial#	Property Tag #	Quantity	Reason for Disposal
Green table w/ Benches ^{© FJC}			1	Rust on sides

Requestor Signature



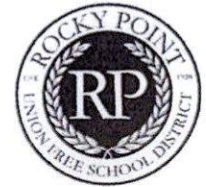
Date: 4/10/24

Assistant Superintendent Signature



Date: 4/12/24

ROCKY POINT PUBLIC SCHOOLS



SURPLUS EQUIPMENT DISPOSAL

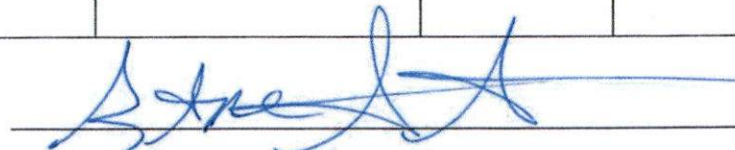
School: FJC

Department: Special-Ed

Name: Sue Artura

Description	Model#/Serial#	Property Tag #	Quantity	Reason for Disposal
iPad	DMPQC8WTFK10	4975	1	Destroyed

Requestor Signature



Date: 5/3/24

Assistant Superintendent Signature



Date: 5/3/24

ROCKY POINT PUBLIC SCHOOLS



SURPLUS EQUIPMENT DISPOSAL

School: HS

Department: Spec. Ed.

Name: John D Raccis

Description	Model#/Serial#	Property Tag #	Quantity	Reason for Disposal
5 Draw Side File	HON	2941	1	outlived its usefulness

Requestor Signature John D Raccis

Date: _____

Assistant Superintendent Signature [Signature]

Date: 5/9/24

ROCKY POINT PUBLIC SCHOOLS



SURPLUS EQUIPMENT DISPOSAL

School: FJC, JAE, MS, HS

Department: Kitchen Name: Shakia Hall

Description	Model#/Serial#	Property Tag #	Quantity	Reason for Disposal
UTC 15" TFT LCD, Pentium E2160 Dual Processor	Model: 3190 Serial: T605800134		1	New POS System - Mosaic
UTC 15" TFT LCD, Pentium E2160 Dual Processor	Model: 3190 Serial: T605800129		1	New POS System - Mosaic
UTC 15" TFT LCD, Pentium E2160 Dual Processor	Model: 3190 Serial: T605800118		1	New POS System - Mosaic
UTC 15" TFT LCD, Pentium E2160 Dual Processor	Model: 3190 Serial: T605800019		1	New POS System - Mosaic
UTC 15" TFT LCD, Pentium E2160 Dual Processor	Model: 3190 Serial: T605800022		1	New POS System - Mosaic
UTC 15" TFT LCD, Pentium E2160 Dual Processor	Model: 3190 Serial: T605800020		1	New POS System - Mosaic
UTC 15" TFT LCD, Pentium E2160 Dual Processor	Model: 3190 Serial: QB15520144		1	New POS System - Mosaic
UTC 15" TFT LCD, Pentium E2160 Dual Processor	Model: 3190 Serial: T605800063		1	New POS System - Mosaic
UTC 15" TFT LCD, Pentium E2160 Dual Processor	Model: 3190 Serial: R202150136		1	New POS System - Mosaic
UTC 15" TFT LCD, Pentium E2160 Dual Processor	Model: 3190 Serial: T605800046		1	New POS System - Mosaic
UTC 15" TFT LCD, Pentium E2160 Dual Processor	Model: 3190 Serial: R202150138		1	New POS System - Mosaic
UTC 15" TFT LCD, Pentium E2160 Dual Processor	Model: 3190 Serial: R202150078		1	New POS System - Mosaic

Requestor Signature



Date: 5/10/24

Assistant Superintendent Signature



Date: 5/10/24

ROCKY POINT PUBLIC SCHOOLS



SURPLUS EQUIPMENT DISPOSAL

School: High School

Department: Kitchen

Name: Shakia Hall

Description	Model#/Serial#	Property Tag #	Quantity	Reason for Disposal
Groen Tilt Kettle	Model # DEE/4-40 Serial # 116 A	000330	1	No Longer Needed

Requestor Signature

[Handwritten Signature]

Date: 5-13-24

Assistant Superintendent Signature

[Handwritten Signature]

Date: 5/15/24

2023-2024 RESERVE FUND TRANSFERS - OUT



ROCKY POINT UNION FREE SCHOOL DISTRICT
BUSINESS OFFICE
90 Rocky Point – Yaphank Road
Rocky Point, New York 11778

Telephone: (631) 744-1600

Fax: (631) 849-7558

Dr. Scott O'Brien
Superintendent of Schools

Christopher Van Cott
Assistant Superintendent for Business

April 3, 2024

Mr. Chris DiPaola
CD Automotive Enterprises Inc.
50B Rocky Point-Yaphank Road
Rocky Point, NY 11778

Re: Bid #22-02 Repair and Maintenance of District Vehicles Contract Extension for 2024-25

Dear Mr. DiPaola:

The current 2021-2022 Repair and Maintenance of District Vehicles contract between CD Automotive Enterprises Inc. and The Rocky Point UFSD allows for the extension of said contract 30 days prior to expiration, upon mutual written agreement between the parties. The District would like to offer the extension for the 2024-2025 school year at the current rates, terms and conditions, subject to Board of Education approval.

Please sign your acknowledgement below and return to the Business Office at the above address by May 15, 2024.

We look forward to working with you again for another year.

Sincerely,

Christopher A. Van Cott
Assistant Superintendent for Business

AGREEMENT

CD Automotive Enterprises Inc. agrees to extend the current Repair & Maintenance of District Vehicles contract, under the same terms and conditions as per Bid #22-02, for the period ~~7/1/2024~~ 7/1/2024-6/30/2025.

Representative – CD Automotive Enterprises Inc.

Date 4/10/24

ROCKY POINT UNION FREE SCHOOL DISTRICT

REPAIR AND MAINTENANCE OF
DISTRICT MOTOR VEHICLES

BID #22-02

BID RESPONSE SHEET

Bid award will be based on the lowest bid price per specifications.

NOTE: to determine the low price bidder, calculations will be based upon: 20 repairs (including pickup and drop off of the vehicles), 87 hours, Parts with a manufacturer's list price of \$2800.

Hourly Labor Charge

\$ 95.00⁰⁰/~~xx~~ /Hr. \$ 8265.00⁰⁰/~~xx~~

Discount off Manufacturer's List price for Parts

Discount 5 % \$ 2660⁰⁰/~~xx~~

Cost for Pickup and Drop-off (round trip) -to/from
Rocky Point, NY

\$ 75⁰⁰/~~xx~~ \$ 1500⁰⁰/~~xx~~

Estimated contract value based on the above scenario:

\$ 12425⁰⁰/~~xx~~



ROCKY POINT UNION FREE SCHOOL DISTRICT
BUSINESS OFFICE
90 Rocky Point – Yaphank Road
Rocky Point, New York 11778

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Fax: (631) 849-7558

Dr. Scott O'Brien
Superintendent of Schools

Christopher Van Cott
Assistant Superintendent for Business

April 17, 2024

Lisa A. Cardinale, Owner/President
Edgewater Consulting, LLC
P.O. Box 202
Caroga Lake, NY 12032

Re: RFP #R22-02 Consultant Services-State Aid/STAC Claims Processing Extension for 2024-25

Dear Ms. Cardinale,

The current 2021/22 contract between Edgewater Consulting, LLC and The Rocky Point UFSD, allows for the extension of said contract 30 days prior to expiration, upon mutual written agreement between the parties. The District would like to offer the extension for the 2024-25 school year at the rates, terms and conditions set forth in the above referenced RFP, subject to Board of Education approval.

Please sign your acknowledgement below and return to Debra Hoffman, Purchasing Agent, at the above address by May 23, 2024.

We look forward to working with you again for another year.

Sincerely,

Christopher A. Van Cott
Assistant Superintendent for Business

AGREEMENT

Edgewater Consulting, LLC agrees to extend the current Consultant Services-State Aid/STAC Claims Processing contract, under the same terms and conditions as per RFP-SY 2021/22 for the period 7/1/24-6/30/25.

Representative-Edgewater Consulting, LLC

Date: _____

COST SUMMARY SHEET

RFP #R22-02

Consultant Services-State Aid/STAC Claims Processing

Description	Proposal				
	2021-22	2022-23	2023-24	2024-25	2025-26
Package 1: Submission of STACS and Advisory/Training Services	\$ 30,000	\$ 30,000	\$ 30,000*	\$ 30,000*	\$ 30,000*
Package 2: Advisory/Training Services only	\$ 12,000	\$ 12,000	\$ 12,000	\$ 12,000	\$ 12,000

*If the district wishes to start re-assuming certain parts of the aid claims process with training from the consultant, contract pricing may be reduced accordingly.

Edgewater Consulting, LLC

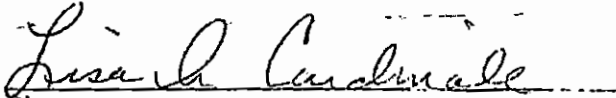
Vendor Name

Lisa A. Cardinale

Authorized Representative (Print)

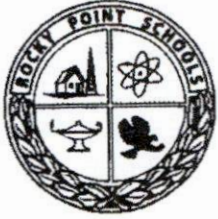
Owner/President

Title


Signature

2/25/21

Date



ROCKY POINT UNION FREE SCHOOL DISTRICT
BUSINESS OFFICE
90 Rocky Point – Yaphank Road
Rocky Point, New York 11778

Telephone: (631) 744-1600

Fax: (631) 849-7558

Dr. Scott O'Brien
Superintendent of Schools

Christopher Van Cott
Assistant Superintendent for Business

April 17, 2024

Ms. Marianne Van Duyne, CPA
R.S. Abrams & Co., LLP
3033 Express Drive North, Suite 100
Islandia, NY 11749

Re: RFP #R22-03 Independent External Auditing Services Contract Extension for Year End June 30, 2025

Dear Ms. Van Duyne:

The current Independent External Auditing Services contract between R.S. Abrams & Co., LLP and The Rocky Point UFSD allows for the extension of said contract 30 days prior to expiration, upon mutual written agreement between the parties. The District would like to offer the extension for the 2024-2025 school year at the rates, terms and conditions set forth in the above referenced RFP, subject to Board of Education approval.

Please sign your acknowledgement below and return to Debra Hoffman, Purchasing Agent, at the above address by May 23, 2024.

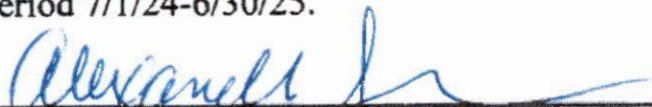
We look forward to working with you again for another year.

Sincerely,


Christopher A. Van Cott
Assistant Superintendent for Business

AGREEMENT

R.S. Abrahms & Co., LLP agrees to extend the current Independent External Auditing Services contract, under the same terms and conditions as per RFP #R22-03, for the period 7/1/24-6/30/25.



Representative – R.S. Abrams & Co., LLP

Date: 4/23/24

V. PROFESSIONAL FEES

Our fees are based on the time spent on the engagement and the billing rates of the individuals assigned. We will bill Rocky Point Union Free School District at the completion of the audit. Ms. Marianne Van Druyne is entitled to represent the firm, empowered to submit the bid and authorized to sign a contract with the Rocky Point Union Free School District. We will not seek reimbursement for travel, lodging, subsistence or other out-of-pocket costs incurred in connection with the audit of the Rocky Point Union Free School District. Based on our experience with other similar engagements, our proposed fee is as follows:

A. TOTAL ALL INCLUSIVE MAXIMUM PRICE:

Independent Audit of the Financial Statements, Extra Classroom and Single Audit

Fiscal year ending June 30, 2022	<u>\$32,000*</u>
Fiscal year ending June 30, 2023	<u>\$32,600</u>
Fiscal year ending June 30, 2024	<u>\$33,200</u>
Fiscal year ending June 30, 2025	<u>\$33,800</u>
Fiscal year ending June 30, 2026	<u>\$34,400</u>

*In light of the current economic conditions school districts are facing and our longstanding working relationship with the District, we will maintain our fee the same as prior year, resulting in a 0% increase. We trust this will assist you with your current budgeting constraints.

B. HOURLY RATES:

Title	Regular	Quoted
	Hourly Rate	Hourly Rate
Partner	\$210	\$190
Manager	\$190	\$170
Supervisor	\$165	\$145
Staff Auditors	\$120	\$100

The above fee includes meeting with the Audit Committee and the Board of Education. If necessary, we will render any additional services agreed to Rocky Point Union Free School District at the same rates set forth in this proposal, and work shall be performed only if set forth in an addendum to this contract between R.S. Abrams & Co., LLP. and the Rocky Point Union Free School District. We will bill Rocky Point Union Free School District on a quarterly basis as work is completed. We understand that payments will be made on the basis of hours of work completed during the course of the engagement in accordance with the proposal.

COST SUMMARY SHEET
RFP #R22-03

Independent External Auditing Services

	2022	2023	2024	2025	2026
Annual Services	\$ 32,000	\$ 92,600	\$ 33,200	\$ 33,800	\$ 34,400

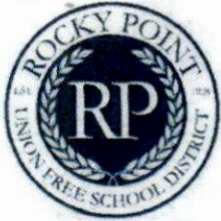
1. What services are considered to be outside the scope of the proposal?

None

2. Please indicate any other fees.

None

Proposer's Name R.S. Abrams & Co., LLP



ROCKY POINT UNION FREE SCHOOL DISTRICT
BUSINESS OFFICE
90 Rocky Point – Yaphank Road
Rocky Point, New York 11778

Telephone: (631) 744-1600

Fax: (631) 849-7558

Dr. Scott O'Brien
Superintendent of Schools

Christopher Van Cott
Assistant Superintendent for Business

April 3, 2024

Ms. Latzie Tober, Sales Manager
The Office Pal
922 State Route 33, Bldg. 8, Suite 801
Freehold, NJ 07728

Re: Bid #23-01 Lexmark OEM Toner & Supplies Contract Extension for 2024-25

Dear Ms. Tober:

The current 2022/2023 Lexmark OEM Toner and Supplies contract between The Office Pal and The Rocky Point UFSD allows for the extension of said contract, upon mutual written agreement between the parties. The District would like to offer the extension for the 2024-25 school year at the current rates, terms and conditions, subject to Board of Education approval.

Please sign your acknowledgement below and return to the Business Office at the above address by May 15, 2024.

We look forward to working with you again for another year.

Sincerely,

Christopher A. Van Cott
Assistant Superintendent for Business

AGREEMENT

The Office Pal agrees to extend the current Lexmark OEM Toner & Supplies contract, under the same terms and conditions as per Bid #23-01, for the period 7/1/2024-6/30/2025.

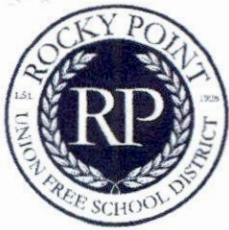
Latzie Tober
Representative – The Office Pal

Date 4.10.2024

BID FORM
Lexmark OEM Toner Cartridge & Supplies Bid #23-01

Item #	Lexmark Model	Item Description	Part #	Price/each delivered
	MS810	Black High Yield Toner Cartridge	52D1H00	\$ 100.00
2		Black Imaging Unit	52D0Z00	\$ 43.18
3		Staple Cartridges (3-pk)	25A0013	\$ 74.28
4	MS826, MX826ade	High Yield Toner Cartridge	58D1U00	\$ 369.90
5		Imaging Unit	58D0Z00	\$ 55.96
6		Staple Cartridges	35S8500	\$ 43.82
7	MX912, MX912dhe	Black High Yield Toner Cartridge	64G0H00	\$ 118.97
8		Photoconductor Kit	54G0P00	\$ 42.55
9		Waste Container	54G0W00	\$ 18.70
10	X954	Black Extra High Yield Toner Cartridge	X950X2KG	\$ 72.29
11		Cyan Extra High Yield Toner Cartridge	X950X2CG	\$ 317.29
12		Magenta Extra High Yield Toner Cartridge	X950X2MG	\$ 317.29
13		Yellow Extra high Yield Toner Cartridge	X950X2YG	\$ 317.29
14		Photoconductor Unit (1 pack)	C950X71G	\$ 200.00
15		Photoconductor Unit (2 pack)	C950X73G	\$ 600.00
16		Waste Toner Bottle	C950X76G	\$ 29.06
17		Staple Cartridges (3-pk) (Same as Item#3)	25A0013	\$ 74.28
18		Booklet Saddle Staple Cartridges (4 pack)	2120357	\$ 116.21
19	CX923dxe	Black High Yield Toner Cartridge	86C0HK0	\$ 121.00
20		Cyan High Yield Toner Cartridge	76C0HC0	\$ 489.98
21		Magenta High Yield Toner Cartridge	76C0HM0	\$ 489.98
22		Yellow High Yield Toner Cartridge	76C0HY0	\$ 489.98
23		CMY Photo Conductor	76C0PV0	\$ 255.93
24		Photo Conductor Unit-black	76C0PK0	\$ 82.09
25		Waste Container (same as #10)	54G0W00	\$ 18.93
26	CS622de, CX625ade	Black Toner Cartridge	78C0U10	\$ 159.26
27		Cyan Toner Cartridge	78C0U20	\$ 211.91
28		Magenta Toner Cartridge	78C0U30	\$ 211.91
29		Yellow Toner Cartridge	78C0U40	\$ 211.91
30		Black Imaging Unit	78C0Z10	\$ 220.00
		4-Color Imaging Unit	78C0Z50	\$ 290.23
		Waste Container	78C0W00	\$ 22.71
31	Percentage off of manufacturers (Lexmark) suggested retail price used to determine prices for items not specified in #1-30.....			25 %

Vendor Name: The Office Pal



ROCKY POINT UNION FREE SCHOOL DISTRICT
BUSINESS OFFICE
90 Rocky Point – Yaphank Road
Rocky Point, New York 11778

Telephone: (631) 744-1600

Fax: (631) 849-7558

Dr. Scott O'Brien
Superintendent of Schools

Christopher Van Cott
Assistant Superintendent for Business

April 3, 2024

Ms. Mary Spiritis, Inside Sales
PC University Distributors
99 W. Hawthorne Avenue, Ste. 521
Valley Stream, NY 11580

Re: Bid #23-01 Lexmark OEM Toner & Supplies Contract Extension for 2024-25

Dear Ms. Spiritis:

The current 2022/2023 Lexmark OEM Toner and Supplies secondary vendor contract between PC University Distributors and The Rocky Point UFSD allows for the extension of said contract, upon mutual written agreement between the parties. The District would like to offer the extension for the 2023-24 school year at the current rates, terms and conditions, subject to Board of Education approval.

Please sign your acknowledgement below and return to the Business Office at the above address by May 15, 2024.

We look forward to working with you again for another year.

Sincerely,

Christopher A. Van Cott
Assistant Superintendent for Business

AGREEMENT

PC University Distributors agrees to extend the current Lexmark OEM Toner & Supplies secondary vendor contract, under the same terms and conditions as per Bid #23-01, for the period 7/1/2024-6/30/2025.

Representative – PC University Distributors

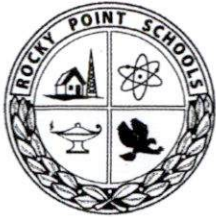
Date

4/11/24

BID FORM
Lexmark OEM Toner Cartridge & Supplies Bid #23-01

Item #	Lexmark Model	Item Description	Part #	Price/each delivered
2	M5910	Black High Yield Toner Cartridge	52D1H00	\$ 80
3		Black Imaging Unit	52D0Z00	\$ 30
4		Staple Cartridges (3-pk)	25A0013	\$ 94
4	M5826, MX826ade	High Yield Toner Cartridge	58D1U00	\$ 38.3
5		Imaging Unit	58D0Z00	\$ 60
6		Staple Cartridges	35S8500	\$ 48
7	MX912, MX912dho	Black High Yield Toner Cartridge	64G0H00	\$ 132
8		Photoconductor Kit	54G0P00	\$ 52
9		Waste Container	54G0W00	\$ 21
10	X954	Black Extra High Yield Toner Cartridge	X950X2KG	\$ 89
11		Cyan Extra High Yield Toner Cartridge	X950X2CG	\$ 328
12		Magenta Extra High Yield Toner Cartridge	X950X2MG	\$ 328
13		Yellow Extra high Yield Toner Cartridge	X950X2YG	\$ 328
14		Photoconductor Unit (1 pack)	C950X71G	\$ 104
15		Photoconductor Unit (2 pack)	C950X73G	\$ 506
16		Waste Toner Bottle	C950X76G	\$ 35
17		Staple Cartridges (3-pk)-(Same as Item#3)	25A0013	\$ 94
18		Booklet Saddle Staple Cartridges (4 pack)	21Z0357	\$ 121
19	CX923dwo	Black High Yield Toner Cartridge	86C0H00	\$ 122
20		Cyan High Yield Toner Cartridge	76C0H00	\$ 431
21		Magenta High Yield Toner Cartridge	76C0H00	\$ 431
22		Yellow High Yield Toner Cartridge	76C0H00	\$ 431
23		CMY Photo Conductor	76C0P00	\$ 235
24		Photo Conductor Unit-black	76C0P00	\$ 88
25		Waste Container (same as #10)	54G0W00	\$ 21
26	CS622de, CS625ade	Black Toner Cartridge	78C0U10	\$ 201
27		Cyan Toner Cartridge	78C0U20	\$ 205
28		Magenta Toner Cartridge	78C0U30	\$ 205
29		Yellow Toner Cartridge	78C0U40	\$ 205
30		Black Imaging Unit	78C0Z10	\$ 270
		4-Color Imaging Unit	78C0Z50	\$ 349
		Waste Container	78C0W00	\$ 33
31	Percentage of of manufacturers (Lexmark) suggested retail price used to determine prices for items not specified in #1-30.			25 %

Vendor Name: PC University Distributors



ROCKY POINT UNION FREE SCHOOL DISTRICT
BUSINESS OFFICE
90 Rocky Point – Yaphank Road
Rocky Point, New York 11778

Telephone: (631) 744-1600

Fax: (631) 849-7558

Dr. Scott O'Brien
Superintendent of Schools

Christopher Van Cott
Assistant Superintendent for Business

April 17, 2024

Mr. John F. Dennehy, Jr.
Certified Public Accountant, P.C.
28 North Country Road, Ste. 204
Mt. Sinai, NY 11766

Re: RFP #R23-02 Internal Claims Auditor Services Contract Extension for 2024-2025

Dear Mr. Dennehy:

The current Internal Claims Auditor Services contract between John F. Dennehy, Jr. Certified Public Accountant, P.C. and The Rocky Point UFSD allows for the extension of said contract 30 days prior to expiration, upon mutual written agreement between the parties. The District would like to offer the extension for the 2024-2025 school year at the rates, terms and conditions set forth in the above referenced RFP, subject to Board of Education approval.

Please sign your acknowledgement below and return to Debra Hoffman, Purchasing Agent, at the above address by May 23, 2024.

We look forward to working with you again for another year.

Sincerely,

Christopher A. Van Cott
Assistant Superintendent for Business

AGREEMENT

John F. Dennehy, Jr. Certified Public Accountant, P.C. agrees to extend the current Internal Claims Auditor Services contract, under the same terms and conditions as per RFP #R23-02, for the period 7/1/24-6/30/25.

Representative-John F. Dennehy, Jr. Certified Public Accountant, P.C.

Date: 4-23-2024

**Part II
Engagement Cost**

Year No. and Dates	Annual Cost	Monthly
1. July 1, 2022 to June 30, 2023	\$19,200.00	\$1,600.00
2. July 1, 2023 to June 30, 2024	\$19,500.00	\$1,625.00
3. July 1, 2024 to June 30, 2025	\$19,800.00	\$1,650.00
4. July 1, 2025 to June 30, 2026	\$20,100.00	\$1,675.00
5. July 1, 2026 to June 30, 2027	\$20,400.00	\$1,700.00

Payment

The total fee will be paid out equally over twelve months. For example, in year 1, the fee will be billed at \$1,600 per month. See above engagement costs for monthly billing costs in years 2 through 5.

Additional Services

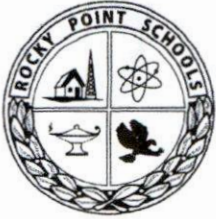
Hourly Rates for additional services not included in the scope of the claims audit will be billed as follows:

Year No. and Dates	Hourly Rate
1. July 1, 2022 to June 30, 2023	\$85.00
2. July 1, 2023 to June 30, 2024	\$86.25
3. July 1, 2024 to June 30, 2025	\$87.50
4. July 1, 2025 to June 30, 2026	\$88.75
5. July 1, 2026 to June 30, 2027	\$90.00

Duties and responsibilities to be performed as Internal Claims Auditor include, but are not limited to the following:

- (a) Verification of the accuracy of invoices and claim forms
- (b) Ensuring proper approval of all purchases: checking that purchases constitute legal expenses of the school district
- (c) Determining that purchase orders have been issued in accordance with Board of Education policy, and applicable state laws
- (d) Comparison of invoices or claims with previously approved contracts
- (e) Comparison of vouchers with purchase orders
- (f) Determining that charges are not duplication(s) of items already paid
- (g) Determining that vouchers are properly itemized and supported by proof of delivery
- (h) Reviewing price extensions, claiming of applicable discounts, and inclusion of shipping and freight charges

*John F. Dennehy, Jr, CPA, PC
Rocky Point UFSD – RFP R23-02*



ROCKY POINT UNION FREE SCHOOL DISTRICT
BUSINESS OFFICE
90 Rocky Point – Yaphank Road
Rocky Point, New York 11778

Telephone: (631) 744-1600

Fax: (631) 849-7558

Dr. Scott O'Brien
Superintendent of Schools

Christopher Van Cott
Assistant Superintendent for Business

April 3, 2024

Mr. John Maccarone, President
Maccarone Plumbing Inc.
10 Sea Cliff Avenue
Glen Cove, NY 11542

Re: Bid #23-04 Plumbing Services Contract Extension for 2024-25

Dear Mr. Maccarone:

The current 2022/2023 Irrigation System Maintenance & Repair contract between Maccarone Plumbing, Inc. and The Rocky Point UFSD allows for the extension of said contract, upon mutual written agreement between the parties. The District would like to offer the extension for the 2024-25 school year at the current rates, terms and conditions, subject to Board of Education approval.

Please sign your acknowledgement below and return to the Business Office at the above address by May 15, 2024.

We look forward to working with you again for another year.

Sincerely,

Christopher A. Van Cott
Assistant Superintendent for Business

AGREEMENT

Maccarone Plumbing, Inc. agrees to extend the current Plumbing Services contract, under the same terms and conditions as per Bid #23-04, for the period 7/1/2024-6/30/2025.

Representative – Maccarone Plumbing, Inc.

Date 4-8-24

BID RESPONSE SHEET

Plumbing Services

Bid #23-04

The Contractor shall have the resources (labor, materials and equipment) necessary to mobilize within two (2) hours for emergency repairs and, for all non-emergency assignments, a quote must be provided within ten (10) days of request and work shall commence within seven (7) days or as scheduled by the Director of Facilities for all aspects of the, "as needed", on-call services contract.

1. Regular Hourly Labor Rate \$ 130.00 per man
2. Regular Hourly Labor-Helper Rate \$ 86.00 per man

Overtime rate will be 1.5 times the hourly rate quoted above. (Overtime hours as defined in Specifications). Overtime will only be paid when certified payrolls indicate employees were paid overtime.

3. Materials Mark Up Percentage 10 % (not to exceed 10%)

In the event that two vendors bid the same hourly rate, the lowest Materials Mark-up percentage may be used to determine bid award.

4. Emergency Telephone Number (516) 674-1553 - After Hours/Weekends
(516) 671-3232 - Mon-Fri 8-5

Name of Firm

Maccarone Plumbing Inc.

Contact Person

John Maccarone

Contact Signature

[Handwritten Signature]

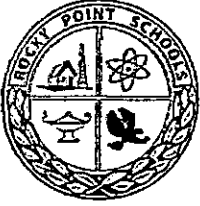
Address

10 Sea Cliff Ave
Glen Cove, NY 11542

Office Phone:

516-671-3232

Cell Phone:



ROCKY POINT UNION FREE SCHOOL DISTRICT
BUSINESS OFFICE
90 Rocky Point – Yaphank Road
Rocky Point, New York 11778

Telephone: (631) 744-1600

Fax: (631) 849-7558

Dr. Scott O'Brien
Superintendent of Schools

Christopher Van Cott
Assistant Superintendent for Business

April 3, 2024

Mr. Jeremy Eckers
Rest Easy Pest Control, LLC/
Bug Fighters Etc., Inc.
P.O. Box 746
Yaphank, NY 11980

Re: Bid #23-06 Integrated Pest Management Services Contract Extension for 2024-25

Dear Mr. Eckers,

The current 2021-2022 Integrated Pest Management contract between Rest Easy Pest Control LLC/Bug Fighters Etc., Inc. and The Rocky Point UFSD allows for the extension of said contract 30 days prior to expiration, upon mutual written agreement between the parties. The District would like to offer the extension for the 2024-2025 school year at the current rates, terms and conditions, subject to Board of Education approval.

Please sign your acknowledgement below and return to the Business Office at the above address by May 15, 2024.

We look forward to working with you again for another year.

Sincerely,

A handwritten signature in black ink, appearing to read "C. Van Cott".

Christopher A. Van Cott
Assistant Superintendent for Business

AGREEMENT

Rest Easy Pest Control/Bug Fighters Etc., Inc. agrees to extend the current Integrated Pest Management Services contract, under the same terms and conditions as per Bid #23-06, for the period 7/1/2024-6/30/2025.

A handwritten signature in black ink, appearing to read "Dan Kameo".

Representative-Rest Easy Pest Control LLC/Bug Fighters, Inc.

Date: 04/29/24

INTEGRATED PEST MANAGEMENT SERVICES
Bid #23-06

BID RESPONSE SHEET

- 1) Integrated Pest Management Program (4 Building Kitchens)
Per Month for all locations: \$ 140.00
- Per Year (12 months) for all locations: \$ 1,680.00
- 2) Emergency Service
Price Per Call \$ 150.00 per call
(estimate 5 calls)

The treatment of termites, carpenter ants and stinging insects, including, but not limited to Bees, Wasps and Hornets, are not covered under the monthly IPM Service Contract. Treatment shall be provided on an as needed basis as required and approved by the District. Contractor shall provide a one (1) year written warranty against infestations or re-infestations by subterranean termites or other wood destroying insects of the building areas treated under this contract. The Warranty shall include inspections three (3) times per year of the treated areas. If live infestations are discovered during the warranty period, and the soil and building conditions have not been altered in the interim-Retreat as may be needed for elimination of the infestation at no additional cost; Re-inspect the building area approximately 120 days (4 months) after retreatment at no additional cost

Treatment rates are to be quoted as separate items in the spaces provided below:

- 3) Termites:
- Minimum Charge: \$ 0
- (Estimate 100 linear ft.) Price Per Linear Ft: \$ 9.00 per linear ft.
- Bait Stations- Price Per (10) \$ 0 per ten stations

Additional one-year Warranty/Maintenance (renewable on a year-to-year basis) - Fee must be based on a Percentage of Initial Area Treatment Cost (a copy of the initial treatment invoice must be attached to the annual warranty invoice for verification purposes)

30 % Percent

10) Cost per trap for placement of Rodent Traps \$ 20.00 per trap
(Estimate 50 traps)

11) Cost per hour to inspect/manage/dispose of Traps \$ 0 per hour
(Estimate 25 hours)

Time and Materials: Miscellaneous

Labor and Materials for services not included in specifications:

12) Labor Rate: \$ 145.00 per hour


13) Materials

Materials are to be billed at contractor's cost plus 20%. Contractor must be able to provide documentation of contractor's invoices. Invoices must be submitted with a copy of the invoice as submitted to the contractor for payment. The contractor agrees and hereby certifies that all parts and materials which are purchased by the contractor shall be at the lowest price available at the time considering the prevailing conditions and circumstances for which it is required that the purchase be made.

VENDOR INFORMATION

Company Name: Bug Fighters Etc., Inc

Address: PO Box 746, Yaphank NY 11980

Signature: 

Print Name: John Haas

Title: President

Telephone # 631 924-6355 Fax: 631 924-6355

Email: bugfightersetc@yahoo.com Website: _____

Federal ID # 11 3134335

Date: 5/20/2022

BID RESPONSE SHEET (page 1 of 2)

ASPHALT/CONCRETE PAVING & REPAIR Bid #23-07

The undersigned agrees to furnish all labor, material and equipment on an AS-NEEDED BASIS. There is no guarantee that any/all services will be required during the contract period.

Prices are all inclusive of material, labor and equipment needed to perform work as specified.

All work under this contract requires a written estimate and approval by the Director of Facilities and/or his designee prior to commencement.

SERVICES RENDERED AND/OR MATERIALS PROVIDED MUST BE AS PER THE ENCLOSED BID SPECIFICATIONS. ALL INVOICES SUBMITTED MUST REFLECT PRICING AS PER THE ENCLOSED BID PROPOSAL PAGES IN ORDER FOR PAYMENT TO BE RENDERED.

PART A: ASPHALT (Weighted Average 40%)	500 SQ.FT. OR LESS	501 SQ.FT. OR MORE
PATCHING: (min. 25sq.ft.) 4" RCA, 3" Base Aggregate, 2" Top	\$ <u>8.95</u> SQ FT.	\$ <u>8.95</u> SQ FT.
Asphalt Swales: 4" RCA, 3" Base Aggregate, 2" Top	\$ <u>.50</u> SQ FT.	\$ <u>.50</u> SQ FT.
Asphalt Curb	\$ <u>.50</u> LN FT.	\$ <u>.50</u> LN FT.
PAVING: 3" Base (Aggregate), 2" Top	\$ <u>.25</u> SQ FT.	\$ <u>7.50</u> SQ FT.
2" MILLING: (Including Sweeping)	\$ <u>.10</u> SQ FT.	\$ <u>1.00</u> SQ FT.
SEAL COATING: (min. 500 sq. ft.) Manufacturer Used: _____	\$ <u>N/A</u> SQ FT.	\$ <u>.45</u> SQ FT. (100 sq. ft. or MORE)
INFRARED PATCHING	\$ <u>.01</u> (100 SQ.FT. OR LESS)	\$ <u>.01</u> (101 SQ.FT. OR MORE)
TEMPORARY WINTER PATCH	\$ <u>.01</u> SQ FT.	\$ <u>.01</u> SQ FT.
	500 LN/SO FT. OR LESS	501 LN/SO FT. OR MORE
CRACK REPAIR:	\$ <u>.02</u> LN FT.	\$ <u>1.50</u> LN FT.
CRACK REPAIR W/ROUTING:	\$ <u>.02</u> LN FT.	\$ <u>.05</u> LN FT.
LINE PAINT/STRIPING:	\$ <u>.05</u> LN FT.	\$ <u>1.50</u> LN FT.
BLACKTOP CUTTING:	\$ <u>2.00</u> LN FT.	\$ <u>.50</u> LN FT.
SPEED BUMPS: (With Milled Key 30" wide)	\$ <u>20.00</u> LN FT.	\$ <u>.50</u> LN FT.

BID RESPONSE SHEET (page 2 of 2)

PART B: CONCRETE (Weighted Average 40%)

PATCHING: SAW CUT & REMOVE
Unclassified Excavation

\$ 115.00 /CU YD.

Sidewalk

\$ 15.00 /SQ FT.

Curbing

\$ 25.00 /LN FT.

PAVING:

Sidewalk 4" (New or Replace)-4,000# reinforced concrete

\$ 15.00 /SQ FT.

Sidewalk 6" (New or Replace)-4,000# reinforced concrete

\$ 20.00 /SQ FT.

Curb 4,000# reinforced concrete (2 #5 Rebar)

\$ 35.00 /LN FT.

Curb w/16" Gutter 4,000# reinforced concrete (4 #5 Rebar)

\$ 6.50 /LN FT.

Mountable Curb 4,000# reinforced concrete (4 #5 Rebar)

\$ 3.50 /LN FT.

PART C: PARKING LOT SWEEP & VACUUM (Weighted Average 10%)

ROCKY POINT HS/MS (3 Lots)

\$ 1,600.00 /per occurrence

JOSEPH A. EDGAR (2 Lots)

\$ 1,200.00 /per occurrence

FRANK J. CARASITI (4 Lots)

\$ 1,200.00 /per occurrence

PART D: RESET MANHOLE COVERS & STORM DRAINS (Weighted Average 10%)

Labor

\$ 200.00 /Hour

Material %

% 10 /Mark-up

Vendor Name: Park Line Asphalt Maintenance, Inc.

Authorized Signature: Robert Mailand

Print Name: Robert Mailand

BID RESPONSE SHEET

Cesspool/Septic Tank/Waste Line/Sewer-Jet Service Bid #23-08

The district shall award and procure a contract with the lowest responsible bidder who is capable of **meeting all of the contract requirements** (in addition to the district's boilerplate requirements) and can furnish a price for each of the items defined in the Bid Response Sheet. Vendor **must** bid on and be able to perform **all** services as specified below.

<u>SERVICE</u>	<u>RATE</u>
----------------	-------------

1. CESSPOOL SERVICE

- | | |
|---|--|
| A. Sewage Pumped | \$ <u>195.00</u> Per 1000 gallons pumped |
| B. Grease Trap Cleaning | \$ <u>245.00</u> Per 100 gallons pumped |
| C. Power Snaking Services | \$ <u>175.00</u> Per hour |
| D. Sewer-Jet Services | \$ <u>275.00</u> Per hour |
| E. Disposal of Contaminated Materials | \$ <u>275.00</u> Per cubic/yard |
| F. Chemical Treatment of Septic Pools | \$ <u>150.00</u> Per 10 gallons |
| G. Neutralization Tanks Clean & Restock | \$ <u>500.00</u> Per service |
| H. Pumping and Sanitizing of Ejector Pits | \$ <u>2,500.00</u> Per service |
| I. Aeration of Leaching Pools | \$ <u>500.00</u> Per service |

2. DRAIN CLEANING

- | | |
|-----------------------------------|---------------------------------|
| A. Super Sucker | \$ <u>250.00</u> Per hour |
| B. Disposal of Catch Basin Debris | \$ <u>100.00</u> Per cubic yard |

**3. DRAIN INSTALLATION & REPLACEMENT
(INCLUDING TRENCHING & EXCAVATION)**

- | | |
|---|---------------------------------|
| A. Replace House Traps w/4' of pipe, each side | \$ <u>450.00</u> Per occurrence |
| B. Price for Backhoe or Excavator to install drains | \$ <u>200.00</u> Per hour |
| C. Equipment Operator | \$ <u>250.00</u> Per hour |
| D. Laborer | \$ <u>200.00</u> Per hour |

4. MISCELLANEOUS

- A. Reset Manhole Covers/Storm Drains \$ 125.00 Per hour
B. VIDEO INSPECTIONS \$ 295.00 Per hour
C. MATERIAL (no more than 10%) % 10 MARK-UP

Bid Evaluation: (estimates are for bid evaluation purposes only)

1A \$ 195.00 per 1,000 gals. x 50 = \$ 9,750.00

1C \$ 175.00 per hour x 60 hours = \$ 10,500.00

TOTAL (1): 1A + 1C = \$ 20,250.00

2A \$ 250.00 per hour x 30 hours = \$ 7,500.00

2B \$ 100.00 per cu. yd. x 50 cu. yd = \$ 5,000.00

TOTAL (2): 2A + 2B = \$ 12,500.00

3B \$ 50.00 per hour x 8 hours = \$ 400.00

3C \$ 250.00 per hour x 8 hours = \$ 2,000.00

3D \$ 200.00 per hour x 8 hours = \$ 1,600.00

TOTAL (3): 3B + 3C + 3D = \$ 4,000.00

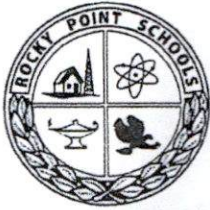
4A \$ 25.00 per hour x 20 hours = \$ 500.00

TOTAL (4): 4A \$ 500.00

TOTAL (1) + TOTAL (2) + TOTAL (3) + TOTAL (4) = \$ 37,250.00

Vendor Name: Park Line Asphalt Maintenance, Inc.

Authorized Signature: Robert Mailand Print Name: Robert Mailand



ROCKY POINT UNION FREE SCHOOL DISTRICT
BUSINESS OFFICE
90 Rocky Point – Yaphank Road
Rocky Point, New York 11778

Telephone: (631) 744-1600

Fax: (631) 849-7558

Dr. Scott O'Brien
Superintendent of Schools

Christopher Van Cott
Assistant Superintendent for Business

April 3, 2024

Mr. Joseph A. Savona
Sav-On Printing
598 Route 25A
Mt. Sinai, NY 11766

Re: Bid #23-09 District Wide Printing Contract Extension for 2024-25

Dear Mr. Savona:

The current 2022-23 District Wide Printing contract between Sav-On Printing and The Rocky Point UFSD allows for the extension of said contract 30 days prior to expiration, upon mutual written agreement between the parties. The District would like to offer the extension for the 2024-2025 school year at the current rates, terms and conditions, subject to Board of Education approval.

Please sign your acknowledgement below and return to the Business Office at the above address by May 15, 2024.

We look forward to working with you again for another year.

Sincerely,

Christopher A. Van Cott
Assistant Superintendent for Business

AGREEMENT

Sav-On Printing agrees to extend the current District Wide Printing contract, under the same terms and conditions as per Bid #23-09, for the period 7/1/2024-6/30/2025.

Representative-Sav-On Printing

Joseph A. SAVONA

Date: 4/9/2024



ROCKY POINT UNION FREE SCHOOL DISTRICT
BUSINESS OFFICE
90 Rocky Point – Yaphank Road
Rocky Point, New York 11778

Telephone: (631) 744-1600

Fax: (631) 849-7558

Dr. Scott O'Brien
Superintendent of Schools

Christopher Van Cott
Assistant Superintendent for Business

April 3, 2024

Mr. Phil Randolph, President
TMT-Excel Communications
1747 Veterans Memorial Hwy., Suite 8
Islandia, NY 11749

Re: Bid #24-02 Analog Phone System Maintenance Contract Extension for 2024-25

Dear Mr. Randolph:

The current 2023-24 Analog Phone System Maintenance contract between TMT-Excel Communications and The Rocky Point UFSD allows for the extension of said contract 30 days prior to expiration, upon mutual written agreement between the parties. The District would like to offer the extension for the 2024-2025 school year at the current rates, terms and conditions, subject to Board of Education approval.

Please sign your acknowledgement below and return to the Business Office at the above address by May 15, 2024.

We look forward to working with you again for another year.

Sincerely,

Christopher A. Van Cott
Assistant Superintendent for Business

AGREEMENT

TMT-Excel Communications agrees to extend the current Analog Phone System Maintenance contract, under the same terms and conditions as per Bid #24-02, for the period 7/1/2024-6/30/2025.



Representative-TMT-Excel Communications

Date: 4/8/24

**ROCKY POINT UFSD
90 ROCKY POINT-YAPHANK ROAD
ROCKY POINT, NY 11778**

BID RESPONSE SHEET

**District Analog Phone System Maintenance
Bid # 24-02**

The district shall award and procure a contract with the lowest responsible bidder who is capable of meeting all of the contract requirements (in addition to the district's boilerplate requirements).

Rates:

- A. LABOR - TECHNICIAN - HOURLY RATE \$ 145⁰⁰
- B. LABOR - TECHNICIAN'S HELPER - HOURLY RATE \$ 95⁰⁰
- C. MATERIALS MARKUP (over Contractors certified cost) 40 %

Note: All invoices submitted for payment MUST include proof of such cost

Vendor Name: TMT Excel Communications Authorized Signature: 



ROCKY POINT UNION FREE SCHOOL DISTRICT
BUSINESS OFFICE
90 Rocky Point - Yaphank Road
Rocky Point, New York 11778

Telephone: (631) 744-1600

Fax: (631) 849-7558

Dr. Scott O'Brien
Superintendent of Schools

Christopher Van Cott
Assistant Superintendent for Business

April 17, 2024

Caryn Hinson, MBA, MSED
Zycron Industries LLC
44 North Chestnut Street
New Paltz, NY 12561

Re: RFP #R24-02 Medicaid Consultant Services Contract Extension for 2024-25

Dear Ms. Hinson:

The current 2023/24 contract between Zycron Industries, LLC and The Rocky Point UFSD, under RFP #R24-02, allows for the extension of said contract 30 days prior to expiration, upon mutual written agreement between the parties. It is the District's intent to offer the extension for the 2024-2025 school year at the current rates, terms and conditions subject to Board of Education approval.

Please sign your acknowledgement below and return to Debra Hoffman, Purchasing Agent, at the above address by May 23, 2024.

We look forward to working with you again for another year.

Sincerely,

A handwritten signature in black ink, appearing to read "C. Van Cott".

Christopher A. Van Cott
Assistant Superintendent for Business

AGREEMENT

Zycron Industries, LLC agrees to extend the current Medicaid Consultant Services contract, under the same terms and conditions as per RFP #R24-02, for the period 7/1/24-6/30/25.

A handwritten signature in black ink, appearing to read "Caryn Hinson".
Representative-Zycron Industries, LLC
Caryn Hinson

Date:

4/23/24

Rocky Point UFSD
CONSULTANT SERVICES CONTRACT

This Agreement is entered into this 1st day of July 2023 by and between the Board of Education of the Rocky Point UFSD (hereinafter the "DISTRICT"), having its principal place of business for the purpose of this Agreement at 90 Rocky Point-Yaphank Rd, Rocky Point, NY 11778 and Zycron Industries (hereinafter "CONSULTANT"), having its principal place of business for the purpose of this Agreement at 44 North Chestnut Street, New Paltz, NY 12561.

A. TERM:

1. The term of this Agreement shall be from July 1, 2023 to June 30, 2024 inclusive, ~~unless terminated early as provided for in this Agreement. It is understood that~~ the DISTRICT is under no obligation to renew this Agreement upon its expiration.

B. CONDITIONS:

In performing services specified in this Agreement, it is understood that:

1. CONSULTANT will be engaged as an independent Contractor, and therefore be solely responsible for the payment of federal and state income taxes applicable to this Agreement.
2. Neither CONSULTANT nor any of its employees, agents, or assigns will be eligible for any employee benefits whatsoever relative to this contract including, but not limited to, social security, New York State Worker's Compensation, unemployment insurance, New York State Employee's Retirement System, health or dental insurance, or malpractice insurance, or the like.
3. DISTRICT, if required by Federal or State requirements, will submit a Form 1099 and IT 2102.1 respectively at year-end to the Federal Government for all individuals having a gross income exceeding \$600, which thereupon will be reported for income tax purposes.
4. This Agreement, and any amendments to this Agreement, ~~will not be in effect until agreed to in writing and signed by authorized representatives of both parties.~~
5. DISTRICT reserves the right to reject any of the CONSULTANT'S staff, if any, which the DISTRICT, at its sole discretion, may deem unqualified.
6. CONSULTANT agrees to hold the DISTRICT safe harmless from any liability incurred during the term of this Agreement arising from the acts or omissions of CONSULTANT'S employees, agents or assigns.

C. SERVICES AND RESPONSIBILITIES:

1. The CONSULTANT shall provide the services set forth in this Agreement to as listed on the attached "Schedule A," incorporated by reference herein and made a part of this agreement.
2. CONSULTANT shall perform all services under this Agreement in accordance with all applicable Federal, State and local laws, rules, and regulations, as well as the established policy guidance from the New York State Education Department.
3. CONSULTANT shall provide conscientious, competent and diligent services throughout the term of this Agreement.
4. CONSULTANT will work cooperatively with District staff.
5. CONSULTANT shall observe and comply with all DISTRICT Policies and Regulations while on the grounds of the DISTRICT or providing services under this Agreement.
6. CONSULTANT will provide their own equipment, will assume full responsibility for the operation of such equipment, and, in addition to any other "hold harmless" provisions contained in this Agreement, will hold the DISTRICT safe harmless from any liability that may arise from the use of such equipment.
7. Consultant and all persons providing services hereunder by or through the Consultant agrees to defend, indemnify, and hold harmless the District, its agents, officers, trustees, employees and attorneys from and against all claims, damages, losses and expenses, including but not limited to, attorneys' fees arising out of or resulting from the performance of this AGREEMENT.

D. REPRESENTATIONS:

1. CONSULTANT represents that all services under this Agreement will be provided by individuals who are of good character, who are in good professional standing, and who possess current and valid licenses/certifications (if required), necessary to perform the services under this Agreement. CONSULTANT represents that no individuals providing services under this Agreement are currently charged, nor in the past have been charged with any criminal or professional misconduct or incompetence. CONSULTANT shall provide copies of licenses / certifications of all professionals servicing the DISTRICT upon the request of the District.
2. In the event that the license / certification of CONSULTANT or any agent or employee thereof is revoked, terminated, suspended, or otherwise impaired, or if any litigation becomes pending against CONSULTANT, or in the event that CONSULTANT receives notice of such impending action, CONSULTANT shall immediately notify the DISTRICT in accordance with the requirements for all notices pursuant to this Agreement set forth below.

E. COMPENSATION:

1. In return for the Consultant's performance of the services set forth on Schedule A, the DISTRICT shall pay CONSULTANT the fee as described in Schedule A, after the DISTRICT'S receipt of the CONSULTANT'S invoice describing the services rendered. The DISTRICT shall pay CONSULTANT within sixty (60) days of the DISTRICT'S receipt of said invoice which shall set forth the dates that the invoice covers and the total amount due for the period specified.

F. TERMINATION:

1. Either the CONSULTANT or the DISTRICT may terminate this Agreement upon thirty (30) days prior written notice to the other party. Such notice shall be given in accordance with the requirements for all notices pursuant to this Agreement set forth below.
2. The parties agree that CONSULTANT'S failure to comply with any terms or conditions of this Agreement will be deemed a material breach of contract, and will provide a basis for the DISTRICT to immediately terminate this Agreement without any further liability to CONSULTANT.
3. In the event the CONSULTANT or the DISTRICT terminates this Agreement with or without cause, such termination of the Agreement shall not discharge the parties' existing obligations to each other as of the effective date of termination.

G. NOTICES

1. All notices which are required or permitted under this Agreement shall be in writing, and shall be deemed to have been given if delivered personally or sent by registered or certified mail, addressed as follows:

To District: Office of the Superintendent of Schools
Rocky Point UFSD
90 Rocky Point-Yaphank Rd
Rocky Point, NY 11778

To Consultant: Zycron Industries
44 North Chestnut Street
New Paltz, NY 12561

H. SUCCESSORS AND ASSIGNS:

1. It is expressly understood that this Agreement shall not be assigned or transferred without prior written consent of the other party.

I. WAIVER OF RIGHTS

1. The failure of either party to enforce any provision of this Agreement shall not be construed as a waiver or limitation of that party's right to subsequently enforce every provision of this Agreement.

J. SEVERABILITY

1. Should any provision of this Agreement, for any reason, be declared invalid and/or unenforceable, such decision shall not effect the validity of the remaining provisions of this Agreement. Such remaining provisions shall remain in full force and effect as if this Agreement had been executed with the invalid provision(s) eliminated.

K. GOVERNING LAW

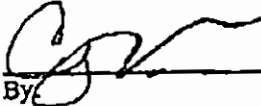
1. This Agreement and the rights and obligations of the parties hereunder shall be construed in accordance with, and governed by, the laws and regulations of the State of New York and applicable Federal laws and regulations.

L. ENTIRE AGREEMENT:

1. This Agreement, along with the attached "Schedule A," is the complete and exclusive statement of the Agreement between the parties, and supersedes all prior or contemporaneous, oral or written: proposals, understandings, representations, conditions or covenants between the parties relating to the subject matter of the Agreement.
2. This Agreement may not be changed orally, but only by an Agreement, in writing, signed by authorized representatives of both parties.

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

Zycron Industries


By: _____ 6/30/2023

Rocky Point UFSD


By: _____
President, Board of Education

SCHEDULE A
2023-2024

The District agrees to pay Consultant a performance fee of Sixteen percent (16%) for all monies actually received and retained by the district as a result of claims submitted by Consultant during the retroactive period (service date of 7/1/2014 through present) from the Federal and/or State government for services rendered by the District to disabled students or others.



ROCKY POINT UNION FREE SCHOOL DISTRICT
BUSINESS OFFICE
90 Rocky Point – Yaphank Road
Rocky Point, New York 11778

Telephone: (631) 744-1600

Fax: (631) 849-7558

Dr. Scott O'Brien
Superintendent of Schools

Christopher Van Cott
Assistant Superintendent for Business

April 17, 2024

Ms. Laura Beck, Vice President
St. Charles Hospital
200 Belle Terre Road
Port Jefferson, NY 11777

Re: RFP #R24-04 NYS Certified Athletic Trainer Services Contract Extension for 2024-2025

Dear Ms. Beck:

The current NYS Certified Athletic Trainer Services contract between St. Charles Hospital and The Rocky Point UFSD allows for the extension of said contract 30 days prior to expiration, upon mutual written agreement between the parties. The District would like to offer the extension for the 2024-2025 school year at the rates, terms and conditions set forth in the above referenced RFP, subject to Board of Education approval.

Please sign your acknowledgement below and return to Debra Hoffman, Purchasing Agent, at the above address by May 23, 2024.

We look forward to working with you again for another year.

Sincerely,

Christopher A. Van Cott
Assistant Superintendent for Business

AGREEMENT

St. Charles Hospital agrees to extend the current NYS Certified Athletic Trainer Services contract, under the same terms and conditions as per RFP #R24-04, for the period 7/1/24-6/30/25.

Representative-St. Charles Hospital

Date: 4/25/2024

RFP Number R24-04
NYS Certified Athletic Trainer

COST SUMMARY SHEET
RFP #R24-04

NYS Certified Athletic Trainer Services

Description	Proposal				
	2023-24	2024-25	2025-26	2026-27	2027-28
Annual Services	\$42,000.00	\$42,000.00	\$42,840.00	\$42,840.00	\$43,695.00

Proposer's/Firm Name: St. Charles Hospital

RFP Number R24-04
NYS Certified Athletic Trainer

Athletic Trainer Services

St. Charles Hospital will provide an Athletic Trainer to Rocky Point Union Free School District from August 1, 2023 through June 30, 2024.

Services will be provided by a BOC certified Athletic Trainer.

Training services to be provided on average 35 hours / week. Training services provided according to the scope of work described in the RFP. Athletic Director will work with assigned athletic trainer to prioritize events, schedule, and coverage.

Fee Schedule

Fall: \$14,000
Winter: \$14,000
Spring: \$14,000

ImPACT Baseline Testing: NO CHARGE

Invoice will be provided to district following each season. Invoicing schedule can be modified to monthly if district requests.

See Attached Cost Summary Sheet initial rates and increases over the potential life of this contract.



ROCKY POINT UNION FREE SCHOOL DISTRICT
BUSINESS OFFICE
90 Rocky Point – Yaphank Road
Rocky Point, New York 11778

Telephone: (631) 744-1600

Fax: (631) 849-7558

Dr. Scott O'Brien
Superintendent of Schools

Christopher Van Cott
Assistant Superintendent for Business

April 17, 2024

Ms. Marianne Van Duyne, CPA
R.S. Abrams & Co., LLP
3033 Express Drive North, Suite 100
Islandia, NY 11749

Re: RFP #R24-05 Financial Accounting and Reporting Services Contract Extension for Year
Ed June 30, 2025

Dear Ms. Van Duyne:

The current Financial Accounting and Reporting Services contract between R.S. Abrams & Co., LLP and The Rocky Point UFSD allows for the extension of said contract 30 days prior to expiration, upon mutual written agreement between the parties. The District would like to offer the extension for the 2024-2025 school year at the rates, terms and conditions set forth in the above referenced RFP, subject to Board of Education approval.

Please sign your acknowledgement below and return to Debra Hoffman, Purchasing Agent, at the above address by May 23, 2024.

We look forward to working with you again for another year.

Sincerely,

Christopher A. Van Cott
Assistant Superintendent for Business

AGREEMENT

R.S. Abrahms & Co., LLP agrees to extend the current Financial Accounting and Reporting Services contract, under the same terms and conditions as per RFP #R24-05, for the period 7/1/24-6/30/25.

Representative – R.S. Abrams & Co., LLP

Date: 4/23/24

II. COST

Our fees are based on the time spent on the engagement and the billing rates of the individuals assigned. Ms. Marianne Van Duyn is entitled to represent the firm, empowered to submit the bid and authorized to sign a contract with the Rocky Point Union Free School District. We will not seek reimbursement for travel, lodging, subsistence or other out-of-pocket costs incurred in connection with the audit of the Rocky Point Union Free School District. Based on our experience with other similar engagements, our proposed fee is as follows:

A. TOTAL ALL INCLUSIVE MAXIMUM PRICE:

Fiscal year ending June 30, 2023	<u>\$9,500</u>
Fiscal year ending June 30, 2024	<u>\$9,500</u>
Fiscal year ending June 30, 2025	<u>\$9,500</u>
Fiscal year ending June 30, 2026	<u>\$9,500</u>
Fiscal year ending June 30, 2027	<u>\$9,500</u>

B. HOURLY RATES:

Title	Regular Hourly Rate	Quoted Hourly Rate
Partner	\$220	\$200
Manager	\$200	\$180
Supervisor	\$170	\$150
Senior Auditors	\$150	\$130
Staff Auditors	\$130	\$110

If necessary, we will render any additional services agreed to Rocky Point Union Free School District the same rates set forth in this proposal, and work shall be performed only if set forth in an addendum to this contract between R.S. Abrams & Co., LLP, and the Rocky Point Union Free School District. We will bill Rocky Point Union Free School District a quarterly basis as work is completed. We understand that payments will be made on the basis of hours of work completed during the course of the engagement in accordance with the proposal.

Although fees are important, they should not, in our view be the determining factor in the selection of an auditing firm for the Rocky Point Union Free School District. The choice of external accountants and business advisors should always be made primarily on the basis of qualifications, capabilities and commitment.

We will spare no effort, now or in subsequent years, to find common ground for providing the level of services Rocky Point Union Free School District requires, at a reasonable cost.

APPENDIX A

PROPOSER GUARANTEES

- I. The Proposer certifies it can and will provide and make available, as a minimum, all services set forth in Scope of Services Required.**

- II. The Proposer has read the Contractual Requirements, and agrees that the rights and prerogatives, as detailed, are retained by the Rocky Point Union Free School District.**

- III. The Proposer agrees to be bound by the contractual requirements.**

Signature of Official: Marianne E VanDuyne, CPA

Name (typed): Marianne E. VanDuyne, CPA

Title: Managing Partner

Firm: R.S. Abrams & Co., LLP

Date: July 27, 2023

COST SUMMARY SHEET
RFP #R24-05

Financial Accounting and Reporting Services

Description	Proposal				
	2022-23 Financials	2023-24 Financials	2024-25 Financials	2025-26 Financials	2026-27 Financials
Annual Services – Flat Fee	\$ 9,500	\$9,500	\$ 9,500	\$9,500	\$ 9,500

**ADVERTISEMENT
INVITATION TO BIDDERS**

The Board of Education of the Rocky Point Union Free School District at Rocky Point, Town of Brookhaven, Suffolk County, New York hereby invites sealed bids for:

- ✓ **10:00am** **Schedule No. : 25-01 Electrical Services**
- 10:30am** **Schedule No. : 25-02 Signage-Manufacture & Installation**

as specified in the contract documents.

Bids will be received until **the prevailing time posted above**, on Tuesday, **May 7, 2024**, at the District Administrative Office, 90 Rocky Point-Yaphank Road, Rocky Point, New York 11778, at which time and place all bids will be publicly opened and read aloud.

Bid title should be clearly marked on each envelope, along with the date and time of the bid opening. Due to the uncertainty of carrier service, now and in the future, it is strongly encouraged to mail the bid a week before the bid due date or hand deliver the bid on the date due, beginning at 8:00am.

The Board of Education reserves the right to reject any and all bids, or to accept that bid which in its judgment is in the best interest of the School District.

Any bid submitted will be binding for **Sixty (60)** days after the formal opening thereof, and no bid shall be withdrawn during that time, pending the decision of the Board of Education.

The contract documents, including specifications may be obtained between the hours of **9:00 A.M. and 3:00 P.M., Monday through Friday at the District Administrative Office**, 90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778, or by emailing the Purchasing Agent at : _____ beginning Thursday, **April 4, 2024**. Please note that the District will be closed April 22-April 26, 2024.

**BY ORDER OF THE;
Board of Education
Rocky Point Union Free School District
At Rocky Point, Town of Brookhaven
Suffolk County, New York**

**By: Debra Hoffman
Purchasing Agent**

DATED: April 4, 2024

LEGAL ADVERTISING

ROCKY POINT UNION FREE SCHOOL DISTRICT
Administrative Offices
90 Rocky Point-Yaphank Road
Rocky Point, NY 11778
BIDDERS PROPOSAL AND CERTIFICATION

The Board of Education
Rocky Point Union Free School District
Rocky Point, NY 11778

Attn: Business Office

Gentlemen:

The undersigned agrees to furnish and deliver, in accordance with all specifications and general conditions contained in the attached bid information package, the item(s) and/or service(s) indicated at the price(s) entered below, and agrees to enter into a contract to provide same by acceptance of a purchase order. The undersigned bidder further certifies to having read these specifications, conditions and instructions, and offers to furnish the item(s) or services(s) specified to the Rocky Point Union Free School District in exact accordance with same, as indicated on pages contained in the bid information sheets. It is understood that the Board of Education reserves the right to award this bid to the lowest acceptable bidder, or to reject any or all bids, as best serves the interests of the school district, as determined by the Board of Education.

Schedule No.: 25-01 Electrical Services

Date/Time of Opening: May 7, 2024 @ 10:00am

Name of Bidder

New York Trenchless Inc.

Address

P.O. Box 2208

Aquebogue, N.Y. 11931

Phone: 631-874-8144

Signed by

John Kenny
Name (Print)

President
Title

4/22/24
Date

Note: All communication in connection with this bid should be addressed to the School Business Official, Rocky Point Union Free School District, 90 Rocky Point-Yaphank Road, Rocky Point, New York 11778. Telephone number: 631-849-7563.

ROCKY POINT UNION FREE SCHOOL DISTRICT

ADDITIONAL GENERAL CONDITIONS

GENERAL

Prices as quoted in this bid shall remain in effect without upward revision for the full period of contract.

Firms responding to this bid shall comply with the Prevailing Rate Schedule, Article 8, of the New York State Labor Law, PRC #2024002483.

PERIOD OF CONTRACT

The term of this contract shall be from 7/01/24 through 6/30/25.

SPECIAL

The services required to be performed by this bid must comply with any and all Federal, State, Municipal and Local Laws pertinent thereto, in addition to the rules and regulations of any Administrative Agency having jurisdiction thereof, together with any amendments to said laws, rules and regulations.

RESERVATION

The school district shall order the articles specified in this bid from the successful bidder/s, subject to the availability of appropriated funds, i.e. budget approved and passed by the voters of the district at an annual election held by the district for that purpose.

The contract may be canceled or annulled by the district upon non-performance of contract terms including but not limited to the quality of workmanship, availability of qualified employees and/or project durations; or failure of the Contractor to furnish performance surety within ten (10) days from date of request. Any unfulfilled deliveries against such contract may be purchased from other sources at the Contractor's expense. Upon termination, all obligations related to this contract shall cease, and the Contractor shall be entitled to reimbursement only for services satisfactorily rendered and completed as of the effective date of termination.

HOLD HARMLESS

The Contractor agrees to indemnify and save harmless the Rocky Point Union Free School District against any and all liability, loss, damage, cost or expenses which the Rocky Point Union Free School District may hereafter incur, suffer, or be required to pay by the reason of injury to any person or persons through the negligent or willful act of the Contractor or sub-contractor or the servants or agents of the Contractor or sub-contractor or for any other reason whatsoever arising out of the performance of said contract.

ADDITIONAL GENERAL CONDITIONS

In the event that any action suit or proceeding is brought against the Rocky Point Union Free School District upon any liability arising out of the contract hereinbefore mentioned, the said Rocky Point Union Free School District shall give notice in writing thereof to the Contractor by certified mail-return receipt requested, addressed to the Contractor at the address herein given. Upon receipt of such notice the Contractor at his or its own expense shall defend against such claim, action or proceeding and take all such steps as may be necessary or proper therein by preventing the entry of a judgment or order against the Rocky Point Union Free School District and to do whatever else may be necessary to protect the interest of the Rocky Point Union Free School District

IRAN DIVESTMENT ACT

By submitting a bid in response to this solicitation or by assuming the responsibility of a Contract awarded hereunder, Bidder/Contractor (or any assignee) certifies that it is not on the "Entities Determined To Be Non-Responsive Bidders/Offerers Pursuant to The New York State Iran Divestment Act of 2013" list ("Prohibited Entities List") posted on the OGS website at: <http://www.ogs.ny.gov/about/regs/docs/ListofEntities.pdf> and further certifies that it will not utilize on such Contract any subcontractor that is identified on the Prohibited Entities List. Additionally, Bidder/Contractor is advised that should it seek to renew or extend a Contract awarded in response to the solicitation, it must provide the same certification at the time the Contract is renewed or extended.

During the term of the Contract, should the Rocky Point UFSD receive information that a person (as defined in State Finance Law § 165-a) is in violation of the above-referenced certifications, Rocky Point UFSD will review such information and offer the person an opportunity to respond. If the person fails to demonstrate that it has ceased its engagement in the investment activity which is in violation of the Act within 90 days after the determination of such violation, then Rocky Point UFSD shall take such action as may be appropriate and provided for by law, rule, or contract, including, but not limited to, seeking compliance, recovering damages, or declaring the Contractor in default.

Rocky Point UFSD reserves the right to reject any bid, request for assignment, renewal or extension for an entity that appears on the Prohibited Entities List prior to the award, assignment, renewal or extension of a contract, and to pursue a responsibility review with respect to any entity that is awarded a contract and appears on the Prohibited Entities list after contract award.

INSURANCE REQUIREMENTS-CONTRACTOR

The Contractor shall purchase and maintain during the life of the contract the following insurance. This insurance must be purchased from a New York State licensed, A.M. Rated "A" or "A+" carrier. The Rocky Point Union Free School District and the Rocky Point Board of Education, with the exception of Workers' Compensation and Employers Liability Insurance, shall be named as additional insured and certificate holder. An original of the certificate shall be mailed to the District, with a provision that in the event the policies are either canceled or diminished, at least 30 days prior written notice by certified mail, return receipt requested, thereof shall be given to the District. Any endorsements affecting coverage for additional insured must be attached to the

ROCKY POINT UNION FREE SCHOOL DISTRICT

GENERAL CONDITIONS

All invitations to bid issued by the above name School District will bind bidders and successful bidders to the conditions and requirements set forth in these general conditions, and such conditions shall form an integral part of each purchase contract awarded by the School District.

1. The date and time of bid opening will be stated in the Notice to Bidders.
2. All bids must be submitted on and in accordance with forms provided by the board.
3. All bids received after the time stated in the Notice to Bidders may not be considered and will be returned to the bidder. The bidder assumes the risk of any delay in the mail or in the handling of the mail by employees of the school district. Whether sent by mail or by means of personal delivery, the bidder assumes responsibility for having his bid deposited on time at the place specified.
4. All information required by Notice to Bidders, Specifications and Bid Offer in connection with each item against which a bid is submitted, must be given to constitute a regular bid.
5. The submission of a bid will be construed to mean that the bidder is fully informed as to the extent and character of the supplies, materials or equipment required and a representation that the bidder can furnish the supplies, materials, or equipment satisfactorily in compliance with the specifications.
6. No alteration, erasure or addition is to be made in the typewritten or printed manner. Deviation from the specifications must be set forth in space provided in bid for this purpose.
7. Prices and information required, except signature of bidder, should be typewritten for legibility. Illegible or vague bids may be rejected. All signatures must be written. Facsimile, printed or typewritten signatures are not acceptable.
8. Sales to school districts are not affected by any fair trade agreements. (General Business Law, Ch. 39, Sec 369-a, Sub.3, L. 1941)
9. No charge will be allowed for federal, state or municipal sales and excise taxes since the school district is exempt from such taxes. The price bid shall be net and shall not include the amount of any such tax. Exemption certificates, if required, will be furnished on forms provided by the bidder.
10. In all specifications, the words "or equal" are understood after each article giving manufacturer's name or catalog reference, or on any patented article. The decision of the school district as to whether an alternate or substitution is in fact "equal" shall be final. If bidding on items other than those specified, bidder must in every instance give the trade designation of the article, manufacturer's name, and detailed specification of item he proposes to furnish. Otherwise, bid will be construed as submitted on the identical item as specified.

ROCKY POINT UNION FREE SCHOOL DISTRICT

GENERAL CONDITIONS

11. Bids on equipment must be on standard new equipment, of latest model and in current production, unless otherwise specified.
12. All regularly manufactured stock electrical items must bear the label of the Underwriters' Laboratories, Inc.
13. When bids are requested on a lump sum basis, bidder must bid on each item in the lump sum group. A bidder desiring to bid "no charge" on an item in a group must so indicate; otherwise bid for the group may be rejected.
14. All prices quoted must be "per unit" as specified; e.g., do not quote "per case" when "per dozen" is requested; otherwise, bid may be rejected.
15. Bidder must insert the price per unit and the extensions against each item in his bid. In the event of a discrepancy between the unit price and the extension, the unit price will govern. Prices shall be extended in decimals, not fractions.
16. **Prices shall be net**, including transportation and delivery charges fully prepaid by the successful bidder to destination indicated in the proposal. If award is made on any other basis, transportation charges must be prepaid by the successful bidder and added to the invoice as a separate item. In any case, title shall not pass until items have been delivered and accepted.
17.
 - a. The bid has been arrived at by the bidder independently and has been submitted without collusion with any other vendor of materials, supplies or equipment of the type described in the invitation for bids, and
 - b. The contents of the bid have not been communicated by the bidder, nor, to its best knowledge and belief, by any of its employees or agents, to any person not an employee or agent of the bidder or its surety on any bond furnished herewith prior to the official opening of the bid.
 - c. That to his knowledge no member of the Board of Education of the Rocky Point Union Free School District or any officer or employee or person whose salary is payable in whole or in part from the treasury of said Board of Education is directly or indirectly interested in this bid or in the supplies, materials, equipment, work or service to which it relates, or in any portion of the profits thereof.

ROCKY POINT UNION FREE SCHOOL DISTRICT

GENERAL CONDITIONS

18. All bids must be sealed. They may be submitted either in plain, opaque, envelopes or in those furnished by the school district. All bids must be addressed to:

Rocky Point Union Free School District
Administrative Offices
90 Rocky Point-Yaphank Road
Rocky Point, NY 11778
Attention: Debra Hoffman, Purchasing Agent

Bid envelopes must be clearly marked "Bid". Also the date and time of the bid opening as indicated on the Notice to Bidders must appear on the envelope. Bids must not be attached to or enclosed in packages containing bid samples. Telegraphed bids may be considered at the discretion of the school district. Telephoned quotations or amendments will not be accepted at any time.

19. No interpretation of the meaning of the specifications or other contract document will be made to any bidder orally. Every request for such interpretation should be in writing, addressed to the school district, not later than five (5) days prior to the date fixed for the opening of bids. Notice of any and such interpretations and any supplemental instructions will be sent to all bidders of record by the school district in the form of addenda to the specifications. All addenda so issued shall become a part of the contract documents.
20. If the supplies, materials or equipment are to be delivered over an extended period of time, or if the specifications so state, then the successful bidder may be required to execute an agreement in relation to the performance of his contract, such agreement to be executed by the bidder within 15 days after notification to execute such contract. If the specifications so state, the successful bidder also may be required to furnish a performance bond equal to the full amount of the contract to guarantee the faithful performance of such contract. Such performance bond shall be maintained in full force and effect until the contract shall have been fully performed. The surety company furnishing such performance bond shall be authorized to do business in the State of New York, be a A.M. Best Rated "A" or "A+" carrier, and must be satisfactory to the attorney for the school district. The performance bond shall be executed by the successful bidder at the time of the execution of the contract by the successful bidder and the board.
21. If required in the bid documents, each bidder shall include with his bid, a bid bond or certified check in the amount of five percent (5%) of his total bid, drawn in favor of the Board of Education. Such checks or bonds will be returned to unsuccessful bidders as soon as contracts are signed or purchase orders acknowledged by the successful bidders. Bid deposits of successful bidders will be returned upon the satisfactory completion of the contract.

ROCKY POINT UNION FREE SCHOOL DISTRICT

GENERAL CONDITIONS

SAMPLES

22. All specifications are minimum standards; and accepted bid samples do not supersede specifications for quality unless bid sample is superior, in which case deliveries must be the same identity and quality as accepted bid sample.
23. The school district reserves the right to request a representative sample of the item quoted upon either prior to the award or before shipments are made. If the sample is not in accordance with the requirements of the specification, the school district may reject the bid; or, if award has been made, cancel the contract at the expense of the successful bidder.
24. Samples, when required, must be submitted strictly in accordance with instructions; otherwise, bid may not be considered. If samples are requested subsequent to bid opening, they shall be delivered within ten (10) days of the request, or as directed, for bid to have consideration. Samples must be furnished free of charge and must be accompanied by descriptive memorandum invoices indicating if the bidder desires their return and specifying the address to which they are to be returned provided they have not been used or made useless by tests. Award samples may be held for comparison with deliveries. The school district will not be responsible for any samples destroyed or mutilated by examination or testing. Samples shall be removed by the bidder at his expense. Samples not removed within fifteen (15) days after written notice to the bidder will be regarded as abandoned and the school district shall have the right to dispose of them as its own property.
25. When a specification indicates that an item to be purchased is to be equal to a sample, such sample will be on display at a designated location in the school district. Failure on the part of the bidder to examine sample shall not entitle him to any relief from the conditions imposed in the proposal, specification, etc.

AWARD

26. Awards will be made to the lowest responsible bidder, as will best promote the public interest, taking into consideration the reliability of the bidder, the quality of the materials, equipment or supplies to be furnished, their conformity with the specifications, the purposes for which required, and the terms of delivery.
27. The school district reserves the right to reject all bids. Also reserved is the right to reject, for cause, any bid in whole or in part; to waive technical defects, qualifications; irregularities; and omissions if in its judgment the best interests of the district will be served. Also reserved is the right to reject bids and to purchase items on State contract if such items can be obtained on the same terms, conditions, specifications and at a lower price.
28. The school district reserves the right to make awards within 60 days after the date of the bid opening during which period bids may not be withdrawn unless the bidder distinctly states in his bid that acceptance thereof must be made within in a shorter specified time.

ROCKY POINT UNION FREE SCHOOL DISTRICT

GENERAL CONDITIONS

38. It is mutually understood and agreed that the successful bidder shall not assign, transfer, convey, sublet or otherwise dispose of the contract or his right, title, or interest therein or his power to execute such contract, to any other person, company or corporation without the previous written consent of the school district.

INSTALLATION OF EQUIPMENT

39. The successful bidder shall clean up and remove all debris and rubbish resulting from his work from time to time as required or directed. Upon completion of the work, the premises shall be left in a neat, unobstructed condition, the buildings broom cleaned and everything in perfect repair and order. Old materials are the property of the successful bidder unless otherwise specified.
40. Equipment, supplies and materials shall be stored at the site only on the approval of the school district and at the successful bidder's risk. In general, such on-site storage should be avoided to prevent possible damage or loss of the material.
41. Work shall be progressed so as to cause the least inconvenience to the school district and with proper consideration for the rights of other successful bidders or workmen. The successful bidder shall keep in touch with the entire operation and install his work promptly.
42. Bidders shall acquaint themselves with conditions to be found at the site and shall assume all responsibility for placing and installing the equipment in the locations required.
43. Equipment for trade-in shall be dismantled by the successful bidder and removed at their expense. The condition of the trade-in equipment at the time it is turned over to the successful bidder shall be the same as covered in the specifications, except as affected by normal wear and tear from use up to the time of trade-in. All equipment is represented simply "as is". Equipment is available for inspection only at the delivery point listed for new equipment, unless otherwise specified.

GUARANTEES BY THE SUCCESSFUL BIDDER

44. The successful bidder guarantees:
- a. His products against defective material or workmanship and to repair or replace any damages or marring occasioned in transit.
 - b. To furnish adequate protection from damage for all work and to repair damages of any kind for which he or his workmen are responsible, to the building or equipment, to his own work, or to the work of other successful bidders.
 - c. To carry adequate insurance to protect the school district from loss in case of accident, fire, theft, etc.

ROCKY POINT UNION FREE SCHOOL DISTRICT

GENERAL CONDITIONS

- d. That all deliveries will be equal to the accepted bid sample.
- e. That the equipment or furniture offered is standard, new, latest model of regular stock product or as required by the specifications, with parts regularly used for the type of equipment or furniture offered; also that no attachment or part has been substituted or applied contrary to manufacturer's recommendations and standard practice. Every unit delivered must be guaranteed against faulty material and workmanship for a period of at least one year from date of delivery. If during this period such faults develop, the successful bidder agrees to replace the unit or the part affected without cost to the school district.

Any merchandise provided under the contract which is or becomes defective during the guarantee period shall be replaced by the successful bidder free of charge with the specific understanding that all replacements shall carry the same guarantee as the original equipment (one year from the date of acceptance of the replacement). The successful bidder shall make any such replacement immediately upon receiving notice from the school district.

- 45. Delivery must be made as ordered and in accordance with the proposal and specification. If delivery instructions do not appear on order, it will be interpreted to mean prompt delivery (not to exceed 30 days). The decision of the school district as to reasonable compliance with delivery terms shall be final. Burden of proof of delay in receipt of order shall rest with the successful bidder. Failure to deliver because of delayed payments or for any other reason except that described in Paragraph 52 will be cause for open market purchase at the expense of the successful bidder.
- 46. The school district will not schedule any deliveries for Saturdays, Sundays or legal holidays, except commodities required for daily consumption or where the delivery is an emergency, a replacement or is overdue, in which event the convenience of the school district shall govern.
- 47. Items shall be securely and properly packed for shipment, storage and stocking in new shipping containers and according to accepted commercial practice, without extra charge for packing case, bailing or sacks.
- 48. The successful bidder shall be responsible for delivery of items in good condition at point of destination. He shall file with the carrier all claims for breakage, imperfections and other losses, which will be deducted from invoices. The receiving school district will note for the benefit of successful bidder when packages are not received in good condition.
- 49. Unless otherwise stated in the specifications, all items must be delivered into and placed at a point within the building as directed by the shipping instructions or the agent for the school district. The successful bidder will be required to furnish proof of delivery in every instance.

ROCKY POINT UNION FREE SCHOOL DISTRICT

GENERAL CONDITIONS

50. Unloading and placing of the equipment and furniture is the responsibility of the successful bidder, and the school district accepts no responsibility for unloading and placing of equipment. Any cost incurred due to the failure of the successful bidder to comply with this requirement will be charged to him. No help for unloading will be provided by the school district, and suppliers should notify their truckers accordingly.
51. All deliveries shall be accompanied by delivery tickets or packing slips. Tickets shall contain the following information for each item delivered:

Purchase Order Number
Name of Article
Item Number
Quantity
Name of the successful bidder

Carton shall be labeled with purchase order, successful bidder's name and general statement of contents. Failure to comply with this condition shall be considered sufficient reason for refusal to accept the goods.

PAYMENTS

52. Payment for the used portion of an inferior delivery will be made by the school district on an adjusted price basis.
53. Payment will be made only after correct presentation claim forms obtained from the ordering school district.
54. Payments of any claim shall not preclude the school district from making claim for adjustment on any item found not to have been in accordance with general conditions and specifications.

SAVING CLAUSE

55. The successful bidder shall not be held responsible for any losses resulting if the fulfillment of the terms of the contract shall be delayed or prevented by wars, acts of public enemies, strikes, fires, floods, acts of God or for any other acts not within the control of the successful bidder and which by the exercise of reasonable diligence he is unable to prevent.

LEGAL

56. Any bidder, whether successful or unsuccessful, shall reimburse the school district for all costs, disbursements and attorneys' fees incurred in connection with any lawsuit, claim, cause of action, etc. which is frivolous, untenable or otherwise without a good faith basis and related to the bidding process or the subject thereof.

ROCKY POINT UNION FREE SCHOOL DISTRICT

Electrical Services Bid # 25-01

BID SPECIFICATIONS

SCOPE

The Rocky Point School District invites sealed bids for the provision of electrical services Districtwide, on an "as-needed" basis.

Contractor shall have the resources (labor, materials and equipment) necessary to mobilize within two (2) hours for emergency repairs and within three (3) business days after the proposal is accepted for all non-emergency assignments for all aspects of the on-call services contract.

Upon District request, Contractor must respond and furnish a verbal quote within one (1) week and a written proposal within two (2) weeks for any projected work.

The Rocky Point UFSD has 5 facilities throughout the district. The types of facilities include but are not limited to:

- Portable Offices
- Maintenance buildings and/or garages
- School Buildings (HS/MS, Frank J. Carasiti FJC, Joseph A. Edgar JAE)
- Parking lot light towers
- Athletic Fields

Contractor shall be capable of servicing, replacing or installing equipment for all types and manufacturers.

The contract shall include, but not be limited to, the following work:

- Aerial/Service Lighting
- New Installation/Parts
- Emergency Service Calls

QUALIFICATIONS

Contractor must have, as a minimum, five (5) years of continuous experience in the appropriate field.

Contract must have and be able to demonstrate at least five (5) on-staff, full-time, fully qualified employees and service vehicles.

Contractor shall be licensed by the County of Suffolk and local municipalities, where required, and submit documentation upon award.

SERVICE

1. Contractor's service persons shall have tools and equipment necessary to perform required work.
2. All work must be done in accordance with the National Code, current edition, and all state and local codes. When repairing or replacing, the contractor must use the most up-to-date materials being manufactured. No obsolete materials shall be allowed.
3. Parts that have been replaced shall be the property of the District and shall be left at the site unless directed otherwise by the Director of Facilities.
4. All parts shall be new and must be equal to or better than the original equipment. Rebuilt parts may be used only with prior approval of the Director of Facilities. The District reserves the right to furnish parts and materials if they deem it to be in their best interest.
5. Contractor shall maintain an adequate inventory of new, original manufacturer's parts and materials so as to insure prompt repairs on short notice.
6. Except for emergency work, the contractor will be required to submit a budget cost estimate (quote) before any work is started. On emergency work, the contractor must submit his budget cost estimate within forty-eight (48) hours after starting the job. Contractor may be required to furnish a "not-to-exceed" price for a specific project to enable the District to encumber funds for that work.
7. All quotes must be detailed, showing the labor (hours x rate) and the materials (cost + markup) broken out, as per bid pricing.
8. No travel time will be paid. Payments will be made only for time on the job. All invoices must be accompanied by **daily service tickets** specifying time of arrival, work done, materials used, time of departure for each employee, and must be signed by an authorized representative of the District. A copy of this ticket is to be left with the signer, and this shall be the basis for payment. Service tickets not submitted in fashion will result in payments being held up.
9. When contractor is called up to perform emergency work, the service tickets shall be mailed the following day to the Director of Facilities for signature.
10. The District reserves the right to assign its personnel to assist the contractor's mechanics if they deem it to be in their best interest.
11. Contractor must follow the rules and regulations of the school district. This includes, but is not limited to, employees displaying photo identification and wearing a name tag. Contractor must ensure that his/her employees abide by the prohibition against smoking in school buildings or on school grounds.
12. **Contractor shall pay his employees the "prevailing rate of wage" as defined in Section 220 of the New York State Labor Law, Schedule of Wages. The Rocky Point Union Free School District will require proof of payment of the employee's workers reflecting the prevailing rate of wages, through certified payroll. PRC #2024002483 has been assigned to this contract.**
13. The Contractor shall take all reasonable precautions to avoid damage to property or injury to persons.
14. The Contractor shall instruct the Director of Facilities or their Duly Authorized Representative in basic operation of systems to provide the best operating efficiency or conditions.

EQUIPMENT

Under this contract, rental of equipment (aerial bucket truck) is permitted. District cost will be at the hourly rates stated on the Bid Response Sheet. Size and height of truck required for scope of work will be agreed upon between the Contractor and the Director of Facilities prior to commencement of any work.

Hourly aerial truck rates will be in effect only during "active" use. No charges will be accrued for idle equipment or overnight storage.

SUBCONTRACTING

Contractor shall not engage subcontractors, hire others to perform all or part of this Contract, nor otherwise delegate its obligations to perform under this Contract without the prior approval of the District.

In the event that the District approves the use of a subcontractor, Contractor may add 5% to their cost. Subcontractor invoice must be attached to Contractor invoice in order to receive payment.

BASIS OF AWARD

The district shall award and procure a contract with the lowest responsible bidder who is capable of **meeting all of the contract requirements** (in addition to the district's boilerplate requirements) and can furnish a price for ALL of the items defined in the **Bid Response Sheet**. A weighted basis on the prices provided will be used when determining the award recommendation to the lowest, responsible bidder.

CLEANUP

The Contractor shall at all times keep the areas free from accumulation of waste material and rubbish, and prior to completion of work, remove and dispose any rubbish at his expense from and about the premises. Upon completion of a working day, the Contractor shall leave work and premises in clean, neat and workmanlike conditions satisfactory to the Director of Facilities and/or its Duly Authorized Representative.

It is expected that the Contractor will exercise caution and use good judgment in an effort to eliminate possible damage to person or property when working in close proximity to walls, fences, road ways, automobiles, overhead/buried utility lines, etc. The Contractor assumes full responsibility for any and all damages resulting from the work performed.

The Contractor shall restore any and all site damages as a result of any and all work by said contractor at their cost to the satisfaction of the Plant Facilities Administrator and/or their Duly Authorized Representative.

PUBLIC UTILITIES AND SERVICES

Should any construction related to gas lines, electric lines, etc. be required, the following shall be adhered to:

The Utility Companies shall be notified by the Contractor in accordance with section 1918 Of the Penal Law of the State of New York and Article 20, Section 322-a of the New York State General Business Law entitled, "Construction or Blasting Near Pipes Conveying Combustible Gas", which states, "the person having direction or control of such works shall give notice and further, he shall ascertain whether there is within one hundred feet in such street, highway or public place, any pipe conveying combustible gas".

This Contractor and all other excavators must comply with Industrial Code Part 53 whereby this Contractor must obtain the list of each operator of underground facilities and provide advanced notice to each operator his intent to perform excavation in the area specified in this contract. The Contractor will be responsible for the complete mark-out of all underground utilites.

All conduits, sewers, storm drains, water mains, underground electric and telephone conductors or conduits or gas mains encountered in any construction shall be properly and safely taken care of by the Contractor, who shall, upon entering same, notify the public corporation to whom they belong, in order that they may be changed in such a manner as not to interfere with the final construction it is impossible to cross over, under or around the other utility.

In case any damage shall result in any service pipe for water, gas, irrigation, telephone or any other public or private sewer or conduit, The Contractor shall, without delay, and at his own expense, repair the same to the satisfaction of the Director of Facilities and/or their Duly Authorized Representative, and in case such repairs are not made satisfactorily or promptly, the District may have the repairs made by another Contractor, or otherwise, and deduct the cost of same from any monies due or about to come due the Contractor.

ASBESTOS CONTAINING MATERIALS

If the scope of work involves disturbing building materials, contractor is responsible to review the Asbestos Management Plan and most recent AHERA Inspection report and certify that the scope will not disturb any suspect or known asbestos containing materials. If contractor has questions about the document or building materials, contractor will call Mr. Paul Martinez, Director of Facilities at Rocky Point UFSD.

INVOICING

The contractor shall submit properly completed invoices with supporting work orders attached prior to receiving payment in any form. All invoices with corresponding signed work orders shall be submitted to the Accounts Payable Dept. at 90 Rocky Point-Yaphank Road, Rocky Point, NY 11778 for payment.

1. Invoices shall reference the purchase order number
2. Invoices shall reference the bid number

**ROCKY POINT UFSD
90 ROCKY POINT-YAPHANK ROAD
ROCKY POINT, NY 11778**

BID RESPONSE SHEET

Electrical Services

Bid # 25-01

The district shall award and procure a contract with the lowest responsible bidder who is capable of **meeting all of the contract requirements** (in addition to the district's boilerplate requirements) and can furnish a price for all of the items stated on the Bid Response Sheet. Failure to provide pricing for Items A-F may result in disqualification.

A weighted basis on the prices provided will be used when determining the award recommendation to the lowest, responsible bidder (see attached sample worksheet).

Rates:

- | | |
|--|-----------------------------|
| A. LABOR - MECHANIC - HOURLY RATE | \$ <u>95.⁰⁰</u> |
| B. LABOR - HELPER - HOURLY RATE | \$ <u>40.⁰⁰</u> |
| C. AERIAL BUCKET TRUCK (Up to 30') Hourly | \$ <u>30.⁰⁰</u> |
| D. AERIAL BUCKET TRUCK (Up to 50') Hourly | \$ <u>50.⁰⁰</u> |
| E. AERIAL BUCKET TRUCK (Up to 125') Hourly | \$ <u>125.⁰⁰</u> |

Note: Overtime Rate will be paid at a rate of 1.5 x straight time. Overtime will only be paid when certified payrolls indicate employees were paid overtime.

- F. MATERIALS MARKUP (over Contractors certified cost) 10 %

Note: All invoices submitted for payment **MUST** include proof of such cost

Vendor Name: New York Trenchless Inc Authorized Signature: 

**Electrical Services
Bid # 25-01**

SAMPLE bid calculation for determining lowest, responsible bidder:

This document will NOT be accepted as a substitute for the vendor's BID RESPONSE SHEET.

	<u>Hourly Rate</u>	<u>Total</u>
A. <u>Mechanic</u>		
Estimated 200 hours	\$ <u>95.⁰⁰</u>	\$ <u>19,000.⁰⁰</u>
B. <u>Bucket Truck (Up to 30')</u> –hourly rate in addition to above labor rates		
Estimated 30 hours	\$ <u>30.⁰⁰</u>	\$ <u>900.⁰⁰</u>
C. <u>Cost of Materials= \$5,000 + Percentage Markup</u>		\$ <u>5,500.⁰⁰</u>
(e.g. 10% Markup) cost = \$5,000 + Percentage Markup \$500 = \$5,500		
<u>TOTAL COST</u> (A + B + C)		\$ <u>25,400.⁰⁰</u>

ROCKY POINT UNION FREE SCHOOL DISTRICT
ADMINISTRATIVE OFFICE
90 ROCKY POINT-YAPHANK ROAD
ROCKY POINT, NY 11778

REFERENCES

Company Name:

Rocky Point Union Free School District

Address:

Contact Person:

Paul Martinez

Telephone: ()

Dates of Contract(s)

2020 To Present

Company Name:

Riverhead Union Free School District

Address:

700 Osban Av.

Contact Person:

Frank Sciarratta

Telephone: ()

631-804-6542

Date of Contract(s)

2021 To Present

Company Name:

Town of Brookhaven

Address:

#1 Independence Hill

Contact Person:

Clara Garcia

Telephone: ()

631-451-6433

Date of Contract(s)

2003 to Present

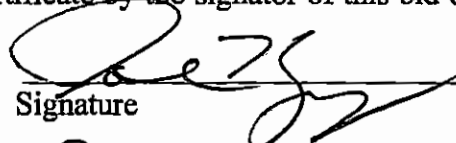
Vendor Name: New York Trenchless Inc.

**ROCKY POINT UNION FREE SCHOOL DISTRICT
NON-COLLUSIVE BIDDING CERTIFICATION**

Chapter 751 of the Laws of 1965 amended Section 103-d of the General Municipal Law required that every bid or proposal submitted to a political sub-division of New York State must contain the following certification properly signed and executed:

The undersigned hereby certifies that:

- a. This bid or proposal has been independently arrived at without collusion with any other bidder with any competitor or potential competitor;
- b. This bid or proposal has not been knowingly disclosed and will not be knowingly disclosed, prior to the opening of bids or proposals for this project, to any other bidder, competitor or potential competitor;
- c. No attempt has been or will be made to induce any other person, partnership or corporation to submit or not to submit a bid or proposal;
- d. The person signing this bid or proposal certifies that he has fully informed himself regarding the accuracy of the statements contained in this certification, and under the penalties of perjury, affirms the truth thereof, such penalties being applicable to the bidder as well as to the person signing in its behalf.
- e. The attached hereto (if a corporate bidder) is a certified copy of resolution authorizing the execution of this certificate by the signator of this bid or proposal in behalf of the corporate bidder.



Signature
President

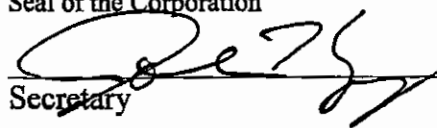
Title

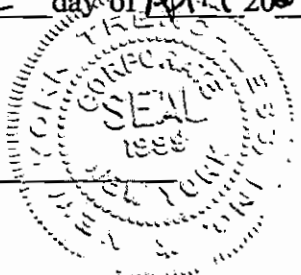
RESOLUTION-for corporate bidders only

RESOLVED that John Kenny be authorized to sign and submit the bid or proposal of this corporation for the following project, Electrical Services

and to include in such bid or proposal the certificate as to non-collusion required by Section one hundred three-d of the General Municipal Law as the act and deed of such corporation, and for any inaccuracies or misstatements in such certificate this corporate bidder shall be liable under the penalties of perjury.

The foregoing is a true and correct copy of the resolution adopted by New York Trenchless, Inc Corporation at a meeting the 22 day of April 2024 (and is still in full force and effect this 22 day of April 2024).

Seal of the Corporation

Secretary



AFFIDAVIT OF COMPLIANCE


STATE OF

COUNTY OF

John Kenny, being duly sworn, deposes and says:

- 1) That (s)he is an officer or representative of New York Trenchless INC. and that (s)he has the authority to sign this affidavit.
- 2) This affidavit is offered as an inducement to the Rocky Point Union Free School District to award to New York Trenchless INC. such purchase contracts for goods or services as directed by the Board of Education, in accordance with New York State law and with District policy.
- 3) That no Officer, Employee or Stockholder of the above referenced vendor is an Employee, in any position, Administrator or Board Member at the Rocky Point Union Free School District other than as disclosed below.
- 4) That no Officer, Employee or Stockholder of the above-referenced vendor is related to an employee in any position, administrator or Board Member, at the Rocky Point Union Free School District other than as disclosed below:

Vendor: List Officer, Employee or Stockholder's Name	Position with Vendor	Rocky Point UFSD Employee, Administrator or Board Member Name	Relationship between parties
<u>None</u>			

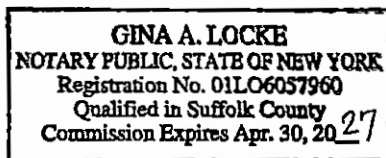

Signed

4/23/24
Date

Sworn to before me this 23rd
Day of April, 2024

Gina A. Locke
Notary Public

Seal



**ADVERTISEMENT
INVITATION TO BIDDERS**

The Board of Education of the Rocky Point Union Free School District at Rocky Point, Town of Brookhaven, Suffolk County, New York hereby invites sealed bids for:

- 10:00am** **Schedule No. : 25-01 Electrical Services**
- ✓ **10:30am** **Schedule No. : 25-02 Signage-Manufacture & Installation**

as specified in the contract documents.

Bids will be received until **the prevailing time posted above**, on Tuesday, **May 7, 2024**, at the District Administrative Office, 90 Rocky Point-Yaphank Road, Rocky Point, New York 11778, at which time and place all bids will be publicly opened and read aloud.

Bid title should be clearly marked on each envelope, along with the date and time of the bid opening. Due to the uncertainty of carrier service, now and in the future, it is strongly encouraged to mail the bid a week before the bid due date or hand deliver the bid on the date due, beginning at 8:00am.

The Board of Education reserves the right to reject any and all bids, or to accept that bid which in its judgment is in the best interest of the School District.

Any bid submitted will be binding for **Sixty (60)** days after the formal opening thereof, and no bid shall be withdrawn during that time, pending the decision of the Board of Education.

The contract documents, including specifications may be obtained between the hours of **9:00 A.M. and 3:00 P.M., Monday through Friday at the District Administrative Office**, 90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778, or by emailing the Purchasing Agent at _____ beginning Thursday, **April 4, 2024**. Please note that the District will be closed April 22-April 26, 2024.

**BY ORDER OF THE;
Board of Education
Rocky Point Union Free School District
At Rocky Point, Town of Brookhaven
Suffolk County, New York**

**By: Debra Hoffman
Purchasing Agent**

DATED: April 4, 2024

LEGAL ADVERTISING

ROCKY POINT UNION FREE SCHOOL DISTRICT
Administrative Offices
90 Rocky Point-Yaphank Road
Rocky Point, New York 11778
BIDDERS PROPOSAL AND CERTIFICATION

The Board of Education
Rocky Point Union Free School District
Rocky Point, NY 11778

Attention: Business Office

Gentlemen:

The undersigned agrees to furnish and deliver, in accordance with all specifications and general conditions contained in the attached bid information package, the item(s) and/or service(s) indicated at the price(s) entered within, and agree to enter into a contract to provide same by acceptance of a purchase order. The undersigned bidder further certifies to having read these specifications, conditions and instructions, and offers to furnish the item(s) or service(s) specified to the Rocky Point Union Free School District in exact accordance with same, as indicated on pages contained in the bid information sheets. It is understood that the Board of Education reserves the right to award this bid to the lowest acceptable bidder, or to reject any or all bids, as best serves the interests of the school district, as determined by the Board of Education.

Bid No.: 25-02 Signage-Manufacture and Installation

Date of Opening: May 7, 2024 @ 10:30am

Alley Cat Signs Design Co. Inc
Vendor Name

506 Middle Country Rd
Street

Middle Island 11953
Town, State, Zip Code

By: 
Signature

Jorge G Chavez
Print Name and Title

631-924-7446
Telephone

Note: All communication in connection with this bid should be addressed to the Purchasing Agent, Rocky Point Union Free School District, Administrative Office, 90 Rocky Point-Yaphank Road, Rocky Point, New York 11778. Telephone number 631-849-7563.

ROCKY POINT UNION FREE SCHOOL DISTRICT

ADDITIONAL GENERAL CONDITIONS

GENERAL

Prices as quoted in this bid shall remain in effect without upward revision for the full period of contract.

The bidder shall upon submission of the bid, deliver in accordance with Section 103D of the General Municipal Law, a Non-Collusive Bidding Certificate (enclosed).

Firms responding to this bid shall comply with the Prevailing Rate Schedule, Article 8, of the New York State Labor Law, PRC #2024002476.

This contract shall cover the period 7/1/2024 through 6/30/2025. The District may terminate the contract for any reason by giving thirty (30) days written notice.

SPECIAL

The services required to be performed by this bid must comply with any and all Federal, State, Municipal and Local Laws pertinent thereto, in addition to the rules and regulations of any Administrative Agency having jurisdiction thereof, together with any amendments to said laws, rules and regulations.

RESERVATION

The school district shall order the articles specified in this bid from the successful bidder/s, subject to the availability of appropriated funds, i.e. budget approved and passed by the voters of the district at an annual election held by the district for that purpose.

The contract may be canceled or annulled by the district upon non-performance of contract terms. Any unfulfilled deliveries against such contract may be purchased from other sources at the Contractor's expense.

HOLD HARMLESS

The Contractor agrees to indemnify and save harmless the Rocky Point Union Free School District against any and all liability, loss, damage, cost or expenses which the Rocky Point Union Free School District may hereafter incur, suffer, or be required to pay by the reason of injury to any person or persons through the negligent or willful act of the Contractor or sub-contractor or the servants or agents of the Contractor or sub-contractor or for any other reason whatsoever arising out of the performance of said contract.

In the event that any action suit or proceeding is brought against the Rocky Point Union Free School District upon any liability arising out of the contract hereinbefore mentioned, the said Rocky Point Union Free School District shall give notice in writing thereof to the Contractor by

ROCKY POINT UNION FREE SCHOOL DISTRICT ADDITIONAL GENERAL CONDITIONS

certified mail-return receipt requested, addressed to the Contractor at the address herein given. Upon receipt of such notice the Contractor at his or its own expense shall defend against such claim, action or proceeding and take all such steps as may be necessary or proper therein by preventing the entry of a judgment or order against the Rocky Point Union Free School District and to do whatever else may be necessary to protect the interest of the Rocky Point Union Free School District.

IRAN DIVESTMENT ACT

By submitting a bid in response to this solicitation or by assuming the responsibility of a Contract awarded hereunder, Bidder/Contractor (or any assignee) certifies that it is not on the "Entities Determined To Be Non-Responsive Bidders/Offerers Pursuant to The New York State Iran Divestment Act of 2013" list ("Prohibited Entities List") posted on the OGS website at: <http://www.ogs.ny.gov/about/regs/docs/ListofEntities.pdf> and further certifies that it will not utilize on such Contract any subcontractor that is identified on the Prohibited Entities List. Additionally, Bidder/Contractor is advised that should it seek to renew or extend a Contract awarded in response to the solicitation, it must provide the same certification at the time the Contract is renewed or extended.

During the term of the Contract, should the Rocky Point UFSD receive information that a person (as defined in State Finance Law § 165-a) is in violation of the above-referenced certifications, Rocky Point UFSD will review such information and offer the person an opportunity to respond. If the person fails to demonstrate that it has ceased its engagement in the investment activity which is in violation of the Act within 90 days after the determination of such violation, then Rocky Point UFSD shall take such action as may be appropriate and provided for by law, rule, or contract, including, but not limited to, seeking compliance, recovering damages, or declaring the Contractor in default.

Rocky Point UFSD reserves the right to reject any bid, request for assignment, renewal or extension for an entity that appears on the Prohibited Entities List prior to the award, assignment, renewal or extension of a contract, and to pursue a responsibility review with respect to any entity that is awarded a contract and appears on the Prohibited Entities list after contract award.

INSURANCE REQUIREMENTS-CONTRACTOR

The Contractor shall purchase and maintain during the life of the contract the following insurance. This insurance must be purchased from a New York State licensed, A.M. Rated "A" or "A+" carrier. The Rocky Point Union Free School District and the Rocky Point Board of Education, with the exception of Workers' Compensation and Employers Liability Insurance, shall be named as additional insured and certificate holder. An original of the certificate shall be mailed to the District, with a provision that in the event the policies are either canceled or diminished, at least 30 days prior written notice by certified mail, return receipt requested, thereof shall be given to the District. Any endorsements affecting coverage for additional insured must be attached to the certificate. The Contractor shall not commence work under this contract until they have obtained all insurance as required and such insurance has been approved by the District.

ROCKY POINT UNION FREE SCHOOL DISTRICT

ADDITIONAL GENERAL CONDITIONS

The Contractor shall require any subcontractor(s) to provide all of the requirements of this section before any work is to commence. In addition, all subcontractors must carry statutory Workers' Compensation and Employers Liability Insurance for their employees.

I. For All Coverages:

Any deductible or self-insured retentions must be declared to and approved by the District. Any failure to comply with reporting provisions of the policies shall not affect coverage provided to the District, its Board of Education, (Board) officers, employees or volunteers.

II. Commercial General Liability Insurance:

"Occurrence" form, including Premises-Operations, Products-Completed Operations, Contractual, Personal Injury, Owner-Contractor Protective and Fire Damage Legal Liability. Coverage shall be in, at minimum, the amount of \$1,000,000 per occurrence, \$2,000,000 aggregate.

III. Comprehensive Automobile Liability Insurance:

On owned, hired, leased, or non-owned motor vehicles in the amount of \$1,000,000 per occurrence, Combined Single Limit. Policy should include code 1-"any auto" and Insurance Services Office (I.S.O.) endorsement CA 0029 (Ed. 12/88)-Changes in Business Auto and Truckers Coverage.

With regard to Comprehensive Automobile and Commercial General Liability coverages, the policies shall be endorsed to contain the following provisions:

- Contractor's insurance coverage shall be primary insurance as respects the District, its Board, officers, employees and volunteers.
- Any insurance or self-insurance maintained by the District, its Board, officers, Employees and volunteers shall be excess of the Transportation Company's Insurance and shall not contribute to it.
- The District and its Board shall enjoy all rights and privileges of the policy contract without the responsibility to pay premiums

IV. Workers' Compensation and Employers Liability:

Statutory Workers' Compensation and Employers Liability Insurance for all of his employees to be engaged in work under the contract and if such work is sublet, the contract shall require the subcontractor to maintain similar coverage for all of his employees.

V. Aircraft and Watercraft Liability (If applicable):

An owned and non-owned aircraft or watercraft (if used during the project), in the amount of \$1,000,000 per occurrence.

ROCKY POINT UNION FREE SCHOOL DISTRICT

GENERAL CONDITIONS

INSPECTION AND INFORMATION

EXAMINATION OF THE SITE, CONTRACT DOCUMENTS AND OTHER RELEVANT MATERIAL:

Each bidder shall visit the site of the proposed work, fully acquaint and familiarize himself with conditions as they fully exist and the character of the operations to be carried on under the proposed contract and make such investigations as he may see fit so that he may fully understand the facilities, difficulties and restrictions attending the execution of the work under this contract. The failure or omission of any bidder to receive or examine any form, instrument or document or any part of the contract documents or to visit the site and acquaint himself with conditions there existing, shall in no way relieve any bidder from any obligations with respect to this proposal, including that of furnishing the material and labor necessary to complete the performance of all the provisions of the proposed contract and the contemplated work therein. By submitting a proposal, the bidder represents and agrees that he has carefully examined and investigated the site and all other matters which in any way affect the work or performance of the contract. As a result of such examination he fully understands the intent and purpose thereof, and his obligations thereunder and that he will not make any claim for or have any right to damages because of any lack of information.

In the event alterations may be necessary to accommodate the Contractor's equipment such alterations shall be made at the sole expense of the contractor and the consent of the school district.

USE OF BID BY OTHER ENTITIES

Although this solicitation was issued, evaluated and awarded by the Rocky Point Union Free School District (RPUFSD), RPUFSD permits all municipal, not-for-profit and political subdivisions authorized under the General Municipal Laws of the State of New York, to purchase any goods and/or services awarded as a result of this solicitation in accordance with the latest amendments to NYS GML 100 through 104. However, it is understood that the extension of such contracts are at the discretion of the vendor and the vendor is only bound to any contract between RPUFSD and the vendor. Any political subdivision utilizing this contract is responsible for all payments between that political subdivision and the awarded vendor(s). All political subdivisions are required to generate their own purchase orders (to the successful vendor) in accordance with the bid provisions and the schedule of award, and acquire and maintain all required documentation.

EXTENSION CLAUSE

Extension Clause-Sixty (60) days prior to the termination of the contract, the parties, upon mutual written agreement, may extend the term for one (1) year and if extended as aforesaid, the parties may again, upon mutual written agreement, extend the contract for two (2) additional one-year periods at the same rates, terms and conditions.

ROCKY POINT UNION FREE SCHOOL DISTRICT GENERAL CONDITIONS

All invitations to bid issued by the above name School District will bind bidders and successful bidders to the conditions and requirements set forth in these general conditions, and such conditions shall form an integral part of each purchase contract awarded by the School District.

1. The date and time of bid opening will be given in the Notice to Bidders.
2. All bids must be submitted on and in accordance with forms provided by the board.
3. All bids received after the time stated in the Notice to Bidders may not be considered and will be returned to the bidder. The bidder assumes the risk of any delay in the mail or in the handling of the mail by employees of the school district. Whether sent by mail or by means of personal delivery, the bidder assumes responsibility for having his bid deposited on time at the place specified.
4. All information required by Notice to Bidders, Specifications and Bid Offer in connection with each item against which a bid is submitted, must be given to constitute a regular bid.
5. The submission of a bid will be construed to mean that the bidder is fully informed as to the extent and character of the supplies, materials or equipment required and a representation that the bidder can furnish the supplies, materials, or equipment satisfactorily in compliance with the specifications.
6. No alteration, erasure or addition is to be made in the typewritten or printed manner. Deviation from the specifications must be set forth in space provided in bid for this purpose.
7. Prices and information required, except signature of bidder, should be typewritten for legibility. Illegible or vague bids may be rejected. All signatures must be written. Facsimile, printed or typewritten signatures are not acceptable.
8. Sales to school districts are not affected by any fair trade agreements. (General Business Law, Ch. 39, Sec 369-a, Sub.3, L. 1941)
9. No charge will be allowed for federal, state or municipal sales and excise taxes since the school district is exempt from such taxes. The price bid shall be net and shall not include the amount of any such tax. Exemption certificates, if required, will be furnished on forms provided by the bidder.
10. In all specifications, the words "or equal" are understood after each article giving manufacturer's name or catalog reference, or on any patented article. The decision of the school district as to whether an alternate or substitution is in fact "equal" shall be final. If bidding on items other than those specified, bidder must in every instance give the trade designation of the article, manufacturer's name, and detailed specification of item he proposes to furnish. Otherwise, bid will be construed as submitted on the identical item as specified.

**ROCKY POINT UNION FREE SCHOOL DISTRICT
GENERAL CONDITIONS**

11. Bids on equipment must be on standard new equipment, of latest model and in current production, unless otherwise specified.
12. All regularly manufactured stock electrical items must bear the label of the Underwriters' Laboratories, Inc.
13. When bids are requested on a lump sum basis, bidder must bid on each item in the lump sum group. A bidder desiring to bid "no charge" on an item in a group must so indicate; otherwise bid for the group may be rejected.
14. All prices quoted must be "per unit" as specified; e.g., do not quote "per case" when "per dozen" is requested; otherwise, bid may be rejected.
15. Bidder must insert the price per unit and the extensions against each item in his bid. In the event of a discrepancy between the unit price and the extension, the unit price will govern. Prices shall be extended in decimals, not fractions.
16. **Prices shall be net**, including transportation and delivery charges fully prepaid by the successful bidder to destination indicated in the proposal. If award is made on any other basis, transportation charges must be prepaid by the successful bidder and added to the invoice as a separate item. In any case, title shall not pass until items have been delivered and accepted.
17.
 - a. The bid has been arrived at by the bidder independently and has been submitted without collusion with any other vendor of materials, supplies or equipment of the type described in the invitation for bids, and
 - b. The contents of the bid have not been communicated by the bidder, nor, to its best knowledge and belief, by any of its employees or agents, to any person not an employee or agent of the bidder or its surety on any bond furnished herewith prior to the official opening of the bid.
 - c. That to his knowledge no member of the Board of Education of the Rocky Point Union Free School District or any officer or employee or person whose salary is payable in whole or in part from the treasury of said Board of Education is directly or indirectly interested in this bid or in the supplies, materials, equipment, work or service to which it relates, or in any portion of the profits thereof.

ROCKY POINT UNION FREE SCHOOL DISTRICT GENERAL CONDITIONS

18. All bids must be sealed. They may be submitted either in plain, opaque, envelopes or in those furnished by the school district. All bids must be addressed to:

Rocky Point Union Free School District
Administrative Offices
90 Rocky Point-Yaphank Road
Rocky Point, NY 11778
Attention: Purchasing

- Bid envelopes must be clearly marked "Bid". Also the date and time of the bid opening as indicated on the Notice to Bidders must appear on the envelope. Bids must not be attached to or enclosed in packages containing bid samples. Telegraphed bids may be considered at the discretion of the school district. Telephoned quotations or amendments will not be accepted at any time.
19. No interpretation of the meaning of the specifications or other contract document will be made to any bidder orally. Every request for such interpretation should be in writing, addressed to the school district, not later than five (5) days prior to the date fixed for the opening of bids. Notice of any and such interpretations and any supplemental instructions will be sent to all bidders of record by the school district in the form of addenda to the specifications. All addenda so issued shall become a part of the contract documents.
20. If the supplies, materials or equipment are to be delivered over an extended period of time, or if the specifications so state, then the successful bidder may be required to execute an agreement in relation to the performance or his contract, such agreement to be executed by the bidder within 15 days after notification to execute such contract. If the specifications so state, the successful bidder also may be required to furnish a performance bond equal to the full amount of the contract to guarantee the faithful performance of such contract. Such performance bond shall be maintained in full force and effect until the contract shall have been fully performed. The surety company furnishing such performance bond shall be authorized to do business in the State of New York, be a A.M. Best Rated "A" or "A+" carrier, and must be satisfactory to the attorney for the school district. The performance bond shall be executed by the successful bidder at the time of the execution of the contract by the successful bidder and the board.
21. Each bidder shall include with his bid, a bid bond or certified check in the amount of five percent (5%) of his total bid, drawn in favor of the Board of Education. Such checks or bonds will be returned to unsuccessful bidders as soon as contracts are signed or purchase orders acknowledged by the successful bidders. Bid deposits of successful bidders will be returned upon the satisfactory completion of the contract.

ROCKY POINT UNION FREE SCHOOL DISTRICT GENERAL CONDITIONS

SAMPLES

22. All specifications are minimum standards; and accepted bid samples do not supersede specifications for quality unless bid sample is superior, in which case deliveries must be the same identity and quality as accepted bid sample.
23. The school district reserves the right to request a representative sample of the item quoted upon either prior to the award or before shipments are made. If the sample is not in accordance with the requirements of the specification, the school district may reject the bid; or, if award has been made, cancel the contract at the expense of the successful bidder.
24. Samples, when required, must be submitted strictly in accordance with instructions; otherwise, bid may not be considered. If samples are requested subsequent to bid opening, they shall be delivered within ten (10) days of the request, or as directed, for bid to have consideration. Samples must be furnished free of charge and must be accompanied by descriptive memorandum invoices indicating if the bidder desires their return and specifying the address to which they are to be returned provided they have not been used or made useless by tests. Award samples may be held for comparison with deliveries. The school district will not be responsible for any samples destroyed or mutilated by examination or testing. Samples shall be removed by the bidder at his expense. Samples not removed within fifteen (15) days after written notice to the bidder will be regarded as abandoned and the school district shall have the right to dispose of them as its own property.
25. When a specification indicates that an item to be purchased is to be equal to a sample, such sample will be on display at a designated location in the school district. Failure on the part of the bidder to examine sample shall not entitle him to any relief from the conditions imposed in the proposal, specification, etc.

AWARD

26. Awards will be made to the lowest responsible bidder, as will best promote the public interest, taking into consideration the reliability of the bidder, the quality of the materials, equipment or supplies to be furnished, their conformity with the specifications, the purposes for which required, and the terms of delivery.
27. The school district reserves the right to reject all bids. Also reserved is the right to reject, for cause, any bid in whole or in part; to waive technical defects, qualifications; irregularities; and omissions if in its judgment the best interests of the district will be served. Also reserved is the right to reject bids and to purchase items on State contract if such items can be obtained on the same terms, conditions, specifications and at a lower price.
28. The school district reserves the right to make awards within 120 days after the date of the bid opening during which period bids may not be withdrawn unless the

**ROCKY POINT UNION FREE SCHOOL DISTRICT
GENERAL CONDITIONS**

bidder distinctly states in his bid that acceptance thereof must be made within in a shorter specified time.

29. Where a bidder is requested to submit a bid on individual items and also on a total sum or sums, the right is reserved to award bids on individual items or on total sums.
30. Each bid will be received with the understanding that the acceptance thereof in writing by the school district, approved by the board of education, to furnish any or all of the items described therein shall constitute a contract between the successful bidder and the school district. Contract shall bind the successful bidder on his part to furnish and deliver at the prices and in accordance with the conditions of his bid. Contract shall bind the school district on its part to order from such successful bidder (except in the case of emergency) and to pay for at the contract prices, all items ordered and delivered, within 10 (ten) per cent over or under the award quantity, unless otherwise specified.
31. The placing in the mail of a notice of award or purchase order to a successful bidder, to the address given in his bid, will be considered sufficient notice of acceptance of contract.
32. If the successful bidder fails to deliver within the time specified, or within reasonable time as interpreted by the school district, or fails to make replacement of rejected articles, when so requested, immediately or as directed by the school district, the school district may purchase from other sources to take the place of the items rejected or not delivered. The school district reserves the right to authorize immediate purchase from other sources against rejections on any contract when necessary. On all such purchases the successful bidder agrees to reimburse the school district promptly for excess costs occasioned by such purchases. Should the cost be less, the successful bidder shall have no claim to the difference. Such purchases will be deducted from contract quantity.
33. A contract may be canceled at the successful bidder's expense upon non-performance of contract.
34. If the successful bidder fails to deliver as ordered, the school district reserves the right to cancel the contract and purchase the balance from other sources at the successful bidder's expense.
35. Cancellation of contract for any reason may result in removal of the successful bidder's name from mailing list for future proposals for an indeterminate period.
36. When materials, equipment or supplies are rejected, they must be removed by the successful bidder from the premises of the school district within five (5) days of notification. Rejected items left longer than five (5) days will be regarded as abandoned, and the school district shall have the right to dispose of them as its own property.

ROCKY POINT UNION FREE SCHOOL DISTRICT

GENERAL CONDITIONS

37. No items are to be shipped or delivered until receipt of an official order from the school district.
38. It is mutually understood and agreed that the successful bidder shall not assign, transfer, convey, sublet or otherwise dispose of the contract or his right, title, or interest therein or his power to execute such contract, to any other person, company or corporation without the previous written consent of the school district.

INSTALLATION OF EQUIPMENT

39. The successful bidder shall clean up and remove all debris and rubbish resulting from his work from time to time as required or directed. Upon completion of the work, the premises shall be left in a neat, unobstructed condition, the buildings broom cleaned and everything in perfect repair and order. Old materials are the property of the successful bidder unless otherwise specified.
40. Equipment, supplies and materials shall be stored at the site only on the approval of the school district and at the successful bidder's risk. In general, such on-site storage should be avoided to prevent possible damage or loss of the material.
41. Work shall be progressed so as to cause the least inconvenience to the school district and with proper consideration for the rights of other successful bidders or workmen. The successful bidder shall keep in touch with the entire operation and install his work promptly.
42. Bidders shall acquaint themselves with conditions to be found at the site and shall assume all responsibility for placing and installing the equipment in the locations required.
43. Equipment for trade-in shall be dismantled by the successful bidder and removed at their expense. The condition of the trade-in equipment at the time it is turned over to the successful bidder shall be the same as covered in the specifications, except as affected by normal wear and tear from use up to the time of trade-in. All equipment is represented simply "as is". Equipment is available for inspection only at the delivery point listed for new equipment, unless otherwise specified.

GUARANTEES BY THE SUCCESSFUL BIDDER

44. The successful bidder guarantees:
 - a. His products against defective material or workmanship and to repair or replace any damages or marring occasioned in transit.
 - b. To furnish adequate protection from damage for all work and to repair damages

ROCKY POINT UNION FREE SCHOOL DISTRICT GENERAL CONDITIONS

of any kind for which he or his workmen are responsible, to the building or equipment, to his own work, or to the work of other successful bidders.

- c. To carry adequate insurance to protect the school district from loss in case of accident, fire, theft, etc.

- d. That all deliveries will be equal to the accepted bid sample.

- e. That the equipment or furniture offered is standard, new, latest model of regular stock product or as required by the specifications, with parts regularly used for the type of equipment or furniture offered; also that no attachment or part has been substituted or applied contrary to manufacturer's recommendations and standard practice. Every unit delivered must be guaranteed against faulty material and workmanship for a period of at least one year from date of delivery. If during this period such faults develop, the successful bidder agrees to replace the unit or the part affected without cost to the school district.

Any merchandise provided under the contract which is or becomes defective during the guarantee period shall be replaced by the successful bidder free of charge with the specific understanding that all replacements shall carry the same guarantee as the original equipment (one year from the date of acceptance of the replacement). The successful bidder shall make any such replacement immediately upon receiving notice from the school district.

- 45. Delivery must be made as ordered and in accordance with the proposal and specification. If delivery instructions do not appear on order, it will be interpreted to mean prompt delivery (not to exceed 30 days). The decision of the school district as to reasonable compliance with delivery terms shall be final. Burden of proof of delay in receipt of order shall rest with the successful bidder. Failure to deliver because of delayed payments or for any other reason except that described in Paragraph 52 will be cause for open market purchase at the expense of the successful bidder.

- 46. The school district will not schedule any deliveries for Saturdays, Sundays or legal holidays, except commodities required for daily consumption or where the delivery is an emergency, a replacement or is overdue, in which event the convenience of the school district shall govern.

- 47. Items shall be securely and properly packed for shipment, storage and stocking in new shipping containers and according to accepted commercial practice, without extra charge for packing case, bailing or sacks.

ROCKY POINT UNION FREE SCHOOL DISTRICT GENERAL CONDITIONS

48. The successful bidder shall be responsible for delivery of items in good condition at point of destination. He shall file with the carrier all claims for breakage, imperfections and other losses, which will be deducted from invoices. The receiving school district will note for the benefit of successful bidder when packages are not received in good condition.
49. Unless otherwise stated in the specifications, all items must be delivered into and placed at a point within the building as directed by the shipping instructions or the agent for the school district. The successful bidder will be required to furnish proof of delivery in every instance.
50. Unloading and placing of the equipment and furniture is the responsibility of the successful bidder, and the school district accepts no responsibility for unloading and placing of equipment. Any cost incurred due to the failure of the successful bidder to comply with this requirement will be charged to him. No help for unloading will be provided by the school district, and suppliers should notify their truckers accordingly.
51. All deliveries shall be accompanied by delivery tickets or packing slips. Tickets shall contain the following information for each item delivered:

Purchase Order Number
Name of Article
Item Number
Quantity
Name of the successful bidder

Carton shall be labeled with purchase order, successful bidder's name and general statement of contents. Failure to comply with this condition shall be considered sufficient reason for refusal to accept the goods.

PAYMENTS

52. Payment for the used portion of an inferior delivery will be made by the school district on an adjusted price basis.
53. Payment will be made only after correct presentation claim forms obtained from the ordering school district.
54. Payments of any claim shall not preclude the school district from making claim for adjustment on any item found not to have been in accordance with general conditions and specifications..

**ROCKY POINT UNION FREE SCHOOL DISTRICT
GENERAL CONDITIONS**

SAVING CLAUSE

55. The successful bidder shall not be held responsible for any losses resulting if the fulfillment of the terms of the contract shall be delayed or prevented by wars, acts of public enemies, strikes, fires, floods, acts of God or for any other acts not within the control of the successful bidder and which by the exercise of reasonable diligence he is unable to prevent.

LEGAL

56. Any bidder, whether successful or unsuccessful, shall reimburse the school district for all costs, disbursements and attorneys' fees incurred in connection with any lawsuit, claim, cause of action, etc. which is frivolous, untenable or otherwise without a good faith basis and related to the bidding process or the subject thereof.

SIGNAGE-Manufacture and Installation
Bid # 25-02

BID SPECIFICATIONS

1) SCOPE:

The Rocky Point School District invites sealed bids for the manufacture and installation of signage throughout the District. Signs will be varied, including, but not limited to pre-manufactured signs and custom manufactured signs, constructed of both natural and artificial materials, illuminated letter boards, digital message boards, carved signs, and self-adhesive signage. Signs may include custom artwork and lettering. Signs may be secured to existing structures or self-supporting.

The purpose of this bid is to establish pricing, as indicated within these specifications, for the "District" and any/all municipal and not-for-profit organizations authorized under the General Municipal Laws of the State of New York, to purchase any goods and/or services awarded as a result of this bid in accordance with the latest amendments to NYS GML 100 through 104. However, it is understood that the extension of such contracts are at the discretion of the vendor and the vendor is only bound to any contract between the Rocky Point Union Free School District and the vendor.

2) TERM OF CONTRACT:

Term of contract will be July 1, 2024 through June 30, 2025. The parties, upon mutual written agreement, may extend the term for one (1) year, and if extended as aforesaid, the parties may again, upon mutual written agreement, extend the contract for two (2) additional one-year periods at the same rates, terms and conditions. The District may terminate the contract for any reason by giving thirty (30) days written notice.

3) QUALIFICATION:

Vendor shall have a minimum of five (5) years' experience in the fabrication and installation of signage and employ skilled workmen thoroughly trained and experienced in the necessary crafts needed to provide the requested work of this specification.

Vendor must be able to provide a Certificate of Insurance, naming the District as "additional insured" as specified in the bid specs under General Conditions-Insurance Requirements-Contractor.

4) MANUFACTURE OF SIGNS:

- A. Vendor shall supply an hourly rate to produce the type of sign requested by the District.
- B. All quotes for requested signs must be approved in advance by the Director of Facilities or his designee, and a Purchase Order issued prior to any manufacture or work.
- C. Vendor shall supply a percent markup on materials. A copy of your actual material cost (Bill) MUST be included with your invoice.

5) DELIVERY OF SIGNS:

- A. If successful vendor is delivering signs to the District (separately from installation), a delivery charge may be added.
- B. The District reserves the right to pick up signs at the vendors location, as the discretion of the District, in lieu of the delivery charge.

6) INSTALLATION OF SIGNS:

- A. Successful vendor must have the ability and equipment to install signs on buildings, fences, etc., as well as installation on self-supporting structures.
- B. Vendor may not subcontract the signage installation.
- C. Installation will be charged as an hourly rate.
- D. No delivery charges will be incurred on installed signs, unless approved by the Director of Facilities or his designee, in advance.
- E. All associated Prevailing Rates apply to this work. PRC #2024002476.

7) INSTALLATION OF SELF-SUPPORTING STRUCTURES:

- A. Self-supporting structures to be installed may be fabricated/supplied by the District (at their discretion), by the successful vendor, or the vendor may subcontract for this work.
- B. Successful vendor may markup the subcontractor's cost for contracted work by **no more than 8%**. A valid Subcontractor quote must accompany all vendor quotes for requested work.
- C. All associated Prevailing Rates apply to this work. PRC #2024002476.

8) WARRANTY:

- A. Materials shall be new stock, free from defects/imperfections, strong and durable. Vendor shall guarantee materials and warranty workmanship for a period of one (1) year. If during this period, any defects or faulty materials are found, upon immediate notification by the District, vendor, at their expense, will repair or replace, at the District's discretion.
- B. Wood signs-prep, primer and finish coats shall be guaranteed for two (2) years against pitting, peeling, or fading.
- C. Self-Adhesive signage shall be warrantied against peeling, blistering, or fading for a period of two (2) years.
- D. High pressure laminates-shall be guaranteed for not less than ten (10) years from time of purchase that the product will not delaminate, peel, blister, crack or fade under normal wear and tear.

9) CLEANUP/SITE RESTORATION

- A. The Contractor shall at all times keep the work areas free from accumulation of waste material and rubbish, and prior to completion of work, remove and dispose any rubbish at his expense from and about the premises. Upon completion of a working day, the Contractor shall leave work and premises in clean, neat and workmanlike conditions satisfactory to the Director of Facilities and/or his Duly Authorized Representative

- B. The vendor shall restore any and all site damages as a result of all work done by said vendor, or their subcontractor, at their cost to the satisfaction of the Director of Facilities and/or his Duly Authorized Representative.

10) INSURANCE REQUIREMENTS:

See General Conditions of Bidders Proposal and Certification, "Insurance Requirements-Contractor".

D. SUBMISSION OF COST PROPOSAL FORM:

- A. All pricing must be entered on the Cost Proposal Form.
B. Vendors must not modify or enter additional information on the Cost Proposal Form.

E. CONFLICTING TERMS:

If any terms contained within the General Terms and Conditions conflict with these Specifications, these Specifications will govern.

VENDOR INFORMATION

Company Name: ALLEY CAT SIGNS DESIGN CO, INC
506 MIDDLE COUNTRY RD Federal ID # 82-4719139
MIDDLE ISLAND, NY 11953.

Signature: Jorge Chavez Print Name/Title: Jorge Chavez
Jorge Chavez President

COST PROPOSAL FORM

Bid #25-02

SIGNAGE- MANUFACTURE & INSTALLATION

The Rocky Point School District invites sealed bids for the manufacture and installation of signage throughout the District. Signs will be varied, including, but not limited to pre-manufactured signs and custom manufactured signs, constructed of both natural and artificial materials, illuminated letter boards, digital message boards, carved signs, and self-adhesive signage. Signs may include custom artwork and lettering. Signs may be secured to existing structures or self-supporting. PRC #2024002476 has been assigned to signage installation.

A. Manufacture of Signs

Journeyman
Helper

\$ 75^{.00} hourly rate (See Bid Specs #4.)
\$ 35^{.00} hourly rate

B. Installation of Signs

Journeyman
Helper

\$ 95^{.00} hourly rate (See Bid Specs #6.)
\$ 35^{.00} hourly

C. Installation of Self-supporting Structures

Journeyman
Helper

\$ 95^{.00} hourly rate (See Bid Specs #7.)
\$ 35^{.00}

D. Delivery Charge

\$ 75^{.00} if applicable (See Bid Specs #5.)

E. Markup on Materials

40% % (See Bid Specs #4.)

ALLEY CAT SIGNS DESIGN CO, INC
506 MIDDLE COUNTRY RD
MIDDLE ISLAND, NY 11953

Vendor Name: _____

Signature of Representative: *Jose Chaves*

ROCKY POINT UNION FREE SCHOOL DISTRICT
90 ROCKY POINT-YAPHANK ROAD
ROCKY POINT, NY 11778

REFERENCES

Company Name: Longwood CSD
Address: 35 Yaphank - Middle Island Rd. Middle Island 11953
Contact Person: _____
Telephone: () 631-345-2796
Dates of Contract(s) July 1st, 2018 - Current

Company Name: Wading River School
Address: 1900 Wading River Manor Rd. Wading River 11792
Contact Person: Louis Parrinello
Telephone: () 631-821-8254
Date of Contract(s) Sept 1st 2019 - Current

Company Name: Port Jefferson School District
Address: 550 Scraggy Hill Rd. Port Jefferson 11777
Contact Person: _____
Telephone: () 631-791-4260
Date of Contract(s) May 7 2020 - Current

ALLEY CAT SIGNS DESIGN CO, INC
506 MIDDLE COUNTRY RD
MIDDLE ISLAND, NY 11953

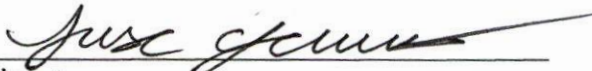
Vendor Name: _____

**ROCKY POINT UNION FREE SCHOOL DISTRICT
NON-COLLUSIVE BIDDING CERTIFICATION**

Chapter 751 of the Laws of 1965 amended Section 103-d of the General Municipal Law required that every bid or proposal submitted to a political sub-division of New York State must contain the following certification properly signed and executed:

The undersigned hereby certifies that:

- a. This bid or proposal has been independently arrived at without collusion with any other bidder with any competitor or potential competitor;
- b. This bid or proposal has not been knowingly disclosed and will not be knowingly disclosed, prior to the opening of bids or proposals for this project, to any other bidder, competitor or potential competitor;
- c. No attempt has been or will be made to induce any other person, partnership or corporation to submit or not to submit a bid or proposal;
- d. The person signing this bid or proposal certifies that he has fully informed himself regarding the accuracy of the statements contained in this certification, and under the penalties of perjury, affirms the truth thereof, such penalties being applicable to the bidder as well as to the person signing in its behalf.
- e. The attached hereto (if a corporate bidder) is a certified copy of resolution authorizing the execution of this certificate by the signator of this bid or proposal in behalf of the corporate bidder.




Signature
President

Title

RESOLUTION-for corporate bidders only

RESOLVED that Jorge Chavez be authorized to sign and submit the bid or proposal of this corporation for the following project, Schedule 25-02
Signage - manufacture and Installation
and to include in such bid or proposal the certificate as to non-collusion required by Section one hundred three-d of the General Municipal Law as the act and deed of such corporation, and for any inaccuracies or misstatements in such certificate this corporate bidder shall be liable under the penalties of perjury.

The foregoing is a true and correct copy of the resolution adopted by 
Corporation at a meeting the 6 day of May 2024 and is still in full force and the
6 day of May 2024.

Seal of the Corporation

Secretary

AFFIDAVIT OF COMPLIANCE

STATE OF

COUNTY OF Suffolk

Jorge Gonzalez-Chavez, being duly sworn, deposes and says:

- 1) That (s)he is an officer or representative of Alley Cat Signs Design Co. Inc. and that (s)he has the authority to sign this affidavit.
- 2) This affidavit is offered as an inducement to the Rocky Point Union Free School District to award to Jorge Gonzalez-Chavez such purchase contracts for goods or services as directed by the Board of Education, in accordance with New York State law and with District policy.
- 3) That no Officer, Employee or Stockholder of the above referenced vendor is an Employee, in any position, Administrator or Board Member at the Rocky Point Union Free School District other than as disclosed below.
- 4) That no Officer, Employee or Stockholder of the above-referenced vendor is related to an employee in any position, administrator or Board Member, at the Rocky Point Union Free School District other than as disclosed below:

Vendor: List Officer, Employee or Stockholder's Name	Position with Vendor	Rocky Point UFSD Employee, Administrator or Board Member Name	Relationship between parties
<u>N</u>			
<u>O</u>			
<u>N</u>			
<u>E</u>			

Jorge Gonzalez-Chavez

Signed

5-6-24

Date

Sworn to before me this 6
Day of May, 2024

[Signature]
Notary Public

TARYN RUCKY
NOTARY PUBLIC STATE OF NEW YORK
SUFFOLK COUNTY
LIC. #01RU0011157
COMM. EXP. 07/13/2027

Seal

CERTIFICATION OF COMPLIANCE WITH THE IRAN DIVESTMENT ACT

As a result of the Iran Divestment Act of 2012 (the "Act"), chapter 1 of the 2012 Laws of New York, a new provision has been added to Stat Finance Law (SFL) § 165-a and New York General Municipal Law § 103-g, both effective April 12, 2012. Under the Act, the Commissioner of the Office of General Services (OGS) will be developing a list of "persons" who are engaged in "investment activities in Iran" (both are defined terms in the law) (the "Prohibited Entities List"). Pursuant to SFL § 165-a(3)(b), the initial list is expected to be issued no later than 120 days after the Act's effective date at which time it will be posted on the OGS website.

By submitting a bid in response to this solicitation or by assuming the responsibility of a Contract awarded hereunder, each Bidder/Contractor, any person signing on behalf of any Bidder/Contractor and any assignee or subcontractor and, in the case of a joint bid, each party thereto, certifies, under penalty of perjury, that once the Prohibited Entities List is posted on the OGS website, that to the best of its knowledge and belief, that each Bidder/Contractor and any subcontractor or assignee is not identified on the Prohibited Entities List created pursuant to SFL §165-a(3)(b).

Additionally, Bidder/Contractor is advised that once the Prohibited Entities List is posted on the OGS Website, any Bidder/Contractor seeking to renew or extend a Contract or assume the responsibility of a Contract awarded in response to this solicitation must certify at the time the Contract is renewed, extended or assigned that it is not included on the Prohibited Entities List.

During the term of the Contract, should the School District receive information that a Bidder/Contractor is in violation of the above-referenced certification, the School District will offer the person or entity an opportunity to respond. If the person or entity fails to demonstrate that he/she/it has ceased engagement in the investment which is in violation of the Act within 90 days after the determination of such violation, then the School District shall take such action as may be appropriate including, but not limited to, imposing sanctions, seeking compliance, recovering damages or declaring the Bidder/Contractor in default. The School District reserves the right to reject any bid or request for assignment for a Bidder/Contractor that appears on the Prohibited Entities List prior to the award of a contract and to pursue a responsibility review with respect to any Bidder/Contractor that is awarded a contract and subsequently appears on the Prohibited Entities List.

I, Joige Chavez, being duly sworn, deposes and says that he/she is the

President of the Alley Cat Signs Design Co. Inc Corporation and that neither the

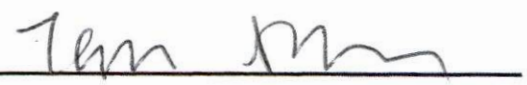
Bidder/Contractor nor any proposed subcontractor is identified on the Prohibited Entities List.


SIGNED

SWORN to before me this

6 day of May

2021

Notary Public: 

TARYN RUCKY
NOTARY PUBLIC STATE OF NEW YORK
SUFFOLK COUNTY
LIC. #01RU0011157
COMM. EXP. 07/13/2027



New York State Insurance Fund

PO Box 66699, Albany, NY 12206

nysif.com

CERTIFICATE OF WORKERS' COMPENSATION INSURANCE

***** 824719139
ALLEY CAT SIGNS DESIGN CO INC
506 MIDDLE COUNTRY ROAD
MIDDLE ISLAND NY 11953



SCAN TO VALIDATE
AND SUBSCRIBE

POLICYHOLDER ALLEY CAT SIGNS DESIGN CO INC 506 MIDDLE COUNTRY ROAD MIDDLE ISLAND NY 11953		CERTIFICATE HOLDER ROCKY POINT UFSD 90 ROCKY POINT - YAPHANK RD ROCKY POINT, NY 11778	
POLICY NUMBER 12443 471-4	CERTIFICATE NUMBER 737162	POLICY PERIOD 05/01/2024 TO 05/01/2025	DATE 5/1/2024

THIS IS TO CERTIFY THAT THE POLICYHOLDER NAMED ABOVE IS INSURED WITH THE NEW YORK STATE INSURANCE FUND UNDER POLICY NO. 2443 471-4, COVERING THE ENTIRE OBLIGATION OF THIS POLICYHOLDER FOR WORKERS' COMPENSATION UNDER THE NEW YORK WORKERS' COMPENSATION LAW WITH RESPECT TO ALL OPERATIONS IN THE STATE OF NEW YORK, EXCEPT AS INDICATED BELOW, AND, WITH RESPECT TO OPERATIONS OUTSIDE OF NEW YORK, TO THE POLICYHOLDER'S REGULAR NEW YORK STATE EMPLOYEES ONLY.

IF YOU WISH TO RECEIVE NOTIFICATIONS REGARDING SAID POLICY, INCLUDING ANY NOTIFICATION OF CANCELLATIONS, OR TO VALIDATE THIS CERTIFICATE, VISIT OUR WEBSITE AT [HTTPS://WWW.NYSIF.COM/CERT/CERTVAL.ASP](https://www.nysif.com/cert/certval.asp). THE NEW YORK STATE INSURANCE FUND IS NOT LIABLE IN THE EVENT OF FAILURE TO GIVE SUCH NOTIFICATIONS.

THIS POLICY DOES NOT COVER CLAIMS OR SUITS THAT ARISE FROM BODILY INJURY SUFFERED BY THE OFFICERS OF THE INSURED CORPORATION:

PRESIDENT
LORI A CHAVEZ
ALLEY CAT SIGNS DESIGN CO INC
(ONE PERSON CORP)

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS NOR INSURANCE COVERAGE UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICY.

FILE COPY

NEW YORK STATE INSURANCE FUND

DIRECTOR, INSURANCE FUND UNDERWRITING

VALIDATION NUMBER: 605788044



CERTIFICATE OF INSURANCE COVERAGE NYS DISABILITY AND PAID FAMILY LEAVE BENEFITS LAW

PART 1. To be completed by NYS disability and Paid Family Leave benefits carrier or licensed insurance agent of that carrier

<p>1a. Legal Name & Address of Insured (use street address only) ALLEY CAT SIGNS DESIGN CO. INC. 506 MIDDLE COUNTRY ROAD MIDDLE ISLAND, NY 11953</p> <p><small>Work Location of Insured (Only required if coverage is specifically limited to certain locations in New York State, i.e., Wrap-Up Policy)</small></p>	<p>1b. Business Telephone Number of Insured 631-924-7446</p> <p>1c. Federal Employer Identification Number of Insured or Social Security Number 824719139</p>
--	---

<p>2. Name and Address of Entity Requesting Proof of Coverage (Entity Being Listed as the Certificate Holder) Rocky Point UFSD 90 Rocky Point - Yaphank Rd Rocky Point, NY 11778</p>	<p>3a. Name of Insurance Carrier ShelterPoint Life Insurance Company</p> <p>3b. Policy Number of Entity Listed in Box "1a" DBL532316</p> <p>3c. Policy effective period <u>05/01/2024</u> to <u>04/30/2025</u></p>
--	---


4. Policy provides the following benefits:

A. Both disability and paid family leave benefits.
 B. Disability benefits only.
 C. Paid family leave benefits only.

5. Policy covers:

A. All of the employer's employees eligible under the NYS Disability and Paid Family Leave Benefits Law.
 B. Only the following class or classes of employer's employees:

Under penalty of perjury, I certify that I am an authorized representative or licensed agent of the insurance carrier referenced above and that the named insured has NYS Disability and/or Paid Family Leave Benefits insurance coverage as described above.

Date Signed 5/6/2024 By 
(Signature of insurance carrier's authorized representative or NYS Licensed Insurance Agent of that insurance carrier)

Telephone Number 516-829-8100 Name and Title Richard White, Chief Executive Officer

IMPORTANT: If Boxes 4A and 5A are checked, and this form is signed by the insurance carrier's authorized representative or NYS Licensed Insurance Agent of that carrier, this certificate is COMPLETE. Mail it directly to the certificate holder.

If Box 4B, 4C or 5B is checked, this certificate is NOT COMPLETE for purposes of Section 220, Subd. 8 of the NYS Disability and Paid Family Leave Benefits Law. It must be emailed to PAU@wcb.ny.gov or it can be mailed for completion to the Workers' Compensation Board, Plans Acceptance Unit, PO Box 5200, Binghamton, NY 13902-5200.

PART 2. To be completed by the NYS Workers' Compensation Board (Only if Box 4B, 4C or 5B have been checked)

State of New York Workers' Compensation Board

According to information maintained by the NYS Workers' Compensation Board, the above-named employer has complied with the NYS Disability and Paid Family Leave Benefits Law (Article 9 of the Workers' Compensation Law) with respect to all of their employees.

Date Signed _____ By _____
(Signature of Authorized NYS Workers' Compensation Board Employee)

Telephone Number _____ Name and Title _____

Please Note: Only insurance carriers licensed to write NYS disability and paid family leave benefits insurance policies and NYS licensed insurance agents of those insurance carriers are authorized to issue Form DB-120.1. **Insurance brokers are NOT authorized to issue this form.**



ROCKY POINT UNION FREE SCHOOL DISTRICT

Bid Number: 25-02 Title: Signage-Manufacture & Install Opening Date: May 7, 2024, 10:30pm

Vendor:

Service:	Alley Cat Signs	Journeyman/hourly rate	Helper/ hourly rate
A	Manufacture of Signs	\$ 75.00	\$ 35.00
B	Installation of Signs	\$ 95.00	\$ 35.00
C	Installation of Structures	\$ 95.00	\$ 35.00
D	Delivery Charge	\$ 75.00	
E	Materials Markup	40%	

Vendor:

Service:		Journeyman/hourly rate	Helper/ hourly rate
A	Manufacture of Signs		
B	Installation of Signs		
C	Installation of Structures		
D	Delivery Charge		
E	Materials Markup		

Vendor:

Service:		Journeyman/hourly rate	Helper/ hourly rate
A	Manufacture of Signs		
B	Installation of Signs		
C	Installation of Structures		
D	Delivery Charge		
E	Materials Markup		

John Gil, MD
Rocky Point Union Free
School District
RFP #:25-03

e. **Umbrella/Excess Insurance**

\$3,000,000 each Occurrence and Aggregate. Umbrella/Excess coverage shall be on a follow-form basis or provide broader coverage over the required Auto Liability (where applicable), General Liability and Professional Liability coverages.

6. The Professional Consultant acknowledges that failure to obtain such insurance on behalf of the District constitutes a material breach of contract and subjects it to liability for damages, indemnification and all legal remedies available to the District/BOCES. The professional consultant is to provide the District with a certificate of insurance, evidencing the above requirements have been met, prior to the provision of services. The failure of the District to object to the contents of the certificate or the absence of same shall not be deemed a waiver of any rights held by the District. If the Professional Consultant or Healthcare Provider utilizes independent contractors, then they must provide verification that coverages extend to the independent contractors. If Independent Contractors are required to provide Professional Errors and Omissions coverage of their own, then proof of this coverage must be provided.

XII. LEGAL CONSTRUCTION

In case any one or more of the provisions contained in this agreement shall for any reason be held to be invalid, illegal or unenforceable in any respect, such invalidity, illegality or unenforceability shall not effect any other provision thereof and this agreement shall be construed as if such invalid, illegal or unenforceable provision has never been contained therein.

NAME OF VENDOR (Please print): John Gil, MD Rocky Point Medical Care, PC

ADDRESS OF VENDOR: 63 Armt Drive, Sayville, NY 11782

FEDERAL EMPLOYER ID #: 11-3031077

TELEPHONE NUMBER: (631) 681-1834

FAX NUMBER: (631) 567-0485

SIGNATURE & TITLE: John Gil MD
PHYSICIAN

NO CONTRACT BECOMES BINDING UNTIL THE NECESSARY FUNDS HAVE BEEN APPROVED FOR THE FISCAL YEAR DURING WHICH THE CONTRACT IS IN EFFECT.

AFFIDAVIT OF COMPLIANCE

STATE OF New York

COUNTY OF Suffolk

John Gil, MD, being duly sworn, deposes and says:

- 1) That (s)he is an officer or representative of Rocky Point Medical Care, PC and that (s)he has the authority to sign this affidavit.
- 2) This affidavit is offered as an inducement to the Rocky Point Union Free School District to award to _____ such purchase contracts for goods or services as directed by the Board of Education, in accordance with New York State law and with District policy.
- 3) That no Officer, Employee or Stockholder of the above referenced vendor is an Employee, in any position, Administrator or Board Member at the Rocky Point Union Free School District other than as disclosed below.
- 4) That no Officer, Employee or Stockholder of the above-referenced vendor is related to an employee in any position, administrator or Board Member, at the Rocky Point Union Free School District other than as disclosed below:

Vendor: List Officer, Employee or Stockholder's Name	Position with Vendor	Rocky Point UFSD Employee, Administrator or Board Member Name	Relationship between parties

John Gil MD
Signed

4-15-24
Date

Sworn to before me this 15th

Day of April 2024

Debra Bentley
Notary Public

DEBRA A. BENTLEY
Notary Public, State of New York
No. 01BE5033430
Qualified in Suffolk County
Commission Expires September 19, 2026

Seal

CERTIFICATION OF COMPLIANCE WITH THE IRAN DIVESTMENT ACT

As a result of the Iran Divestment Act of 2012 (the "Act"), chapter 1 of the 2012 Laws of New York, a new provision has been added to Stat Finance Law (SFL) § 165-a and New York General Municipal Law § 103-g, both effective April 12, 2012. Under the Act, the Commissioner of the Office of General Services (OGS) will be developing a list of "persons" who are engaged in "investment activities in Iran" (both are defined terms in the law) (the "Prohibited Entities List"). Pursuant to SFL § 165-a(3)(b), the initial list is expected to be issued no later than 120 days after the Act's effective date at which time it will be posted on the OGS website.

By submitting a bid in response to this solicitation or by assuming the responsibility of a Contract awarded hereunder, each Bidder/Contractor, any person signing on behalf of any Bidder/Contractor and any assignee or subcontractor and, in the case of a joint bid, each party thereto, certifies, under penalty of perjury, that once the Prohibited Entities List is posted on the OGS website, that to the best of its knowledge and belief, that each Bidder/Contractor and any subcontractor or assignee is not identified on the Prohibited Entities List created pursuant to SFL §165-a(3)(b).

Additionally, Bidder/Contractor is advised that once the Prohibited Entities List is posted on the OGS Website, any Bidder/Contractor seeking to renew or extend a Contract or assume the responsibility of a Contract awarded in response to this solicitation must certify at the time the Contract is renewed, extended or assigned that it is not included on the Prohibited Entities List.

During the term of the Contract, should the School District receive information that a Bidder/Contractor is in violation of the above-referenced certification, the School District will offer the person or entity an opportunity to respond. If the person or entity fails to demonstrate that he/she/it has ceased engagement in the investment which is in violation of the Act within 90 days after the determination of such violation, then the School District shall take such action as may be appropriate including, but not limited to, imposing sanctions, seeking compliance, recovering damages or declaring the Bidder/Contractor in default. The School District reserves the right to reject any bid or request for assignment for a Bidder/Contractor that appears on the Prohibited Entities List prior to the award of a contract and to pursue a responsibility review with respect to any Bidder/Contractor that is awarded a contract and subsequently appears on the Prohibited Entities List.

I, John Gil, MD, being duly sworn, deposes and says that he/she is the President of the Rocky Point Medical Care, PC Corporation and that neither the

Bidder/Contractor nor any proposed subcontractor is identified on the Prohibited Entities List.

John Gil, MD
SIGNED

SWORN to before me this 15th day of April

202011
Notary Public: Debra A. Bentley

DEBRA A. BENTLEY
Notary Public, State of New York
No. 01BE5033430
Qualified in Suffolk County
Commission Expires September 19, 2024

**ROCKY POINT UNION FREE SCHOOL DISTRICT
NON-COLLUSIVE BIDDING CERTIFICATION**

Chapter 751 of the Laws of 1965 amended Section 103-d of the General Municipal Law required that every bid or proposal submitted to a political sub-division of New York State must contain the following certification properly signed and executed:

The undersigned hereby certifies that:

- a. This bid or proposal has been independently arrived at without collusion with any other bidder with any competitor or potential competitor;
- b. This bid or proposal has not been knowingly disclosed and will not be knowingly disclosed, prior to the opening of bids or proposals for this project, to any other bidder, competitor or potential competitor;
- c. No attempt has been or will be made to induce any other person, partnership or corporation to submit or not to submit a bid or proposal;
- d. The person signing this bid or proposal certifies that he has fully informed himself regarding the accuracy of the statements contained in this certification, and under the penalties of perjury, affirms the truth thereof, such penalties being applicable to the bidder as well as to the person signing in its behalf.
- e. The attached hereto (if a corporate bidder) is a certified copy of resolution authorizing the execution of this certificate by the signator of this bid or proposal in behalf of the corporate bidder.

John Gil MD
Signature

PHYSICIAN

Title

RESOLUTION—for corporate bidders only

RESOLVED that _____ be authorized to sign and submit the bid or proposal of this corporation for the following project, _____

and to include in such bid or proposal the certificate as to non-collusion required by Section one hundred three-d of the General Municipal Law as the act and deed of such corporation, and for any inaccuracies or misstatements in such certificate this corporate bidder shall be liable under the penalties of perjury.

The foregoing is a true and correct copy of the resolution adopted by _____ Corporation at a meeting the _____ day of _____ 20__ and is still in full force and effect on this _____ day of _____ 20__.

Seal of the Corporation

Secretary

Rocky Point Union Free School District
RFP# 25-03

The University of the State of New York
Education Department
Office of the Professions

REGISTRATION CERTIFICATE
Do not accept a copy of this certificate

License Number: 177114-01

Certificate Number: 2575668



GIL JOHN J
333 RT 25A
SUITE 40
ROCKY POINT

NY 11778-0000

is registered to practice in New York State through 12/31/2025 as a(n)
PHYSICIAN

Gil John J
LICENSÉE/REGISTRANT

Stephen J. Bolone
EXECUTIVE SECRETARY

Darrah A. Benson
COMMISSIONER OF EDUCATION
DEPUTY COMMISSIONER
FOR THE PROFESSIONS

This document is valid only if it has not expired, name and address are correct, it has not been tampered with and is an original - not a copy. To verify that this registration certificate is valid or for more information please visit www.op.nysed.gov.

ROCKY POINT UNION FREE SCHOOL DISTRICT
90 ROCKY POINT-YAPHANK ROAD
ROCKY POINT, NEW YORK 11778

REFERENCES

Company Name: Connetquot School District
Address: 760 Ocean Avenue, Bohemia, NY 11716
Contact Person: Joanne Pisani, Director, Pupil Personnel Services
Telephone: () (631) 244-2215
Dates of Contract(s) 1991 - Present

Company Name: Port Jefferson School District
Address: 500 Scraggy Hill Rd, Pt. Jefferson, NY 11777
Contact Person: Susan Federico, RN HS. Nursing Office
Telephone: () (631) 791-440
Date of Contract(s) 2010 - Present

Company Name: Mount Sinai School District
Address: 118 North Country Rd., Mt. Sinai, NY 11766
Contact Person: Scott Reh, Athletic Director
Telephone: () (631) 870-2900
Date of Contract(s) 2015 - Present

John Gil, MD
 Rocky Point Union Free School District
 RFP #: 25-03

ROCKY POINT UNION FREE SCHOOL DISTRICT

COST PROPOSAL

Physician Services
 RFP #R25-03

PART 2-COST

A. Mandated Physical Examinations for Pupils		
At District	\$ 14 ⁻	Per Student
At Vendor Office	\$ 25 ⁻	Per Student
B. Sports Physicals		
At District	\$ 14 ⁻	Per Student
At Vendor Office	\$ 25 ⁻	Per Student
C. Chart Reviews		
Review & Sign off on Concussion Returns	\$ 4 ⁻	Per Chart
	\$ 10 ⁻	Per Review
D. Special Education Physicals		
At District	\$ 14 ⁻	Per Student
At Vendor Office	\$ 25 ⁻	Per Student
E. Employee Physicals		
At Vendor Office includes PPD	\$ 70 ⁻	Per Employee
Hepatitis B Vaccine	\$ 100 ⁻	Per Vaccine
Hepatitis B Surface Antibody w/ SD permission	\$ →	Per Lab Costs
F. Physician Consult Services		
CSE Meetings at District	\$ 100 ⁻	Per meeting
Epi Pen Training at District	\$ 100 ⁻	Per Training
G. Annual Administrative Fee (See III. Scope of Service, item h.)		
	\$ 1500 ⁻	Annual Fee
H. Other-please specify		
	\$	

Vendor Name: John Gil, MD



John Gil, MD
Rocky Point Union Free School District
RFP#: 25-03

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
06/05/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER RSC Insurance Brokerage, Inc. 150 N. Radnor Chester Road Suite E100 Radnor PA 19087	CONTACT NAME: Amy Thistle PHONE (A/C, No., Ext): (800) 508-1355 FAX (A/C, No.): E-MAIL ADDRESS: INSURER(S) AFFORDING COVERAGE INSURER A: The Doctors Company RRG NAIC # 14347 INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:
INSURED John Gil, MD C/o Rocky Point Medical Care, PC 63 Amy Drive Sayville NY 11792	

COVERAGES **CERTIFICATE NUMBER:** CL236554802 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GENL AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y/N ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> N/A (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Medical Malpractice			2048319	07/15/2023	07/15/2024	

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Specialty: Family/General Practice - No Surgery
 Coverage Type: Occurrence Policy
 Limits of Liability: \$1,300,000 each occurrence / \$3,900,000 aggregate

CERTIFICATE HOLDER Rocky Point School District 80 Rocky Point-Yaphank Road Rocky Point NY 11778	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
---	--

J O H N J . G I L , M . D . , D . A . B . F . P .

EXPERIENCE

John Gil, MD
Rocky Point Union Free
School District
RFP #:25-03

FAMILY MEDICINE PHYSICIAN

Rocky Point Medical Care, PC, Rocky Point, NY 1990 - Present

SCHOOL PHYSICIAN

Connetquot School District, Bohemia, NY 1991 - Present

Rocky Point School District, Rocky Point, NY 1998 - Present

Mt. Sinai School District, Mt. Sinai, NY 2015 - Present

Port Jefferson School District, Pt Jeff, NY 2011 - Present

EDUCATION

STONY BROOK UNIVERSITY, SCHOOL OF MEDICINE

Doctor of Medicine conferred 5/1987

COLUMBIA UNIVERSITY

B.A. PRE-MED, HISTORY 1983

FOOTBALL 1979-1982; BASEBALL 1980

POST GRADUATE TRAINING

SOUTHSIDE HOSPITAL, BAYSHORE, NY FAMILY MEDICINE RESIDENCY 1987-1990

PROFESSIONAL MEMBERSHIPS/AFFILIATIONS

NEW YORK STATE LICENSE, MEDICINE AND SURGERY 1989- PRESENT

UNIVERSITY HOSPITAL AT STONY BROOK, CLINICAL ASSISTANT PROFESSOR,

ACTIVE ATTENDING PHYSICIAN 1996 - PRESENT

AMERICAN ACADEMY OF FAMILY PHYSICIANS

AMERICAN ACADEMY OF FAMILY PHYSICIANS, BOARD CERTIFIED 1990-PRESENT

IMPACT CONCUSSION MANAGEMENT CERTIFICATION 2011

ST. CHARLES HOSPITAL/J. T. MATHER MEMORIAL HOSPITAL 2015

Rocky Point Medical Care, PC, 333 Route 25A, #40, Rocky Point, NY 11778 (631) 821-9000 Fax (631) 821-9114



John Gil, MD
Rocky Point Union Free
School District
RFP #:25-03

Certificate of Attendance

This certifies that

John Gil, MD

has successfully completed

***A Full Day ImPACT Training Workshop on April 11, 2011
with Mark Lovell, PhD, FACPN and Micky Collins, PhD in Pittsburgh, PA for 6 contact hours.***

Sponsored by: ImPACT Applications, Inc.

BOC Approved Provider Number P3429

2000 Technology Drive, # 150

Pittsburgh, PA 15219-3110

Administrator for ImPACT Applications:

**Mark Lovell, PhD, FACPN
Chairman, ImPACT Applications, Inc.**



ImPACT Applications, Inc. is recognized by the Board of Certification to offer continuing education for certified athletic trainers. This program has been approved for a maximum of 6 hours of Category A continuing education. ATCs are responsible for claiming only those hours actually spent participating in the CE activity.

PR-12

RFP Assessment Worksheet

School Years 2024-25 with options to renew for additional years

Project or Service Description

School Physician

Vendor Scoring (use additional worksheets if necessary)

Selection Criteria	Weight*	John F. Dennehy, Jr CPA									
		Raw Score**	Weighted Score***			Raw Score	Weighted Score	Raw Score	Weighted Score	Raw Score	Weighted Score
Total proposed price	30%	5.00	1.50				-		-		-
Prior experience in similar projects/Qualifications	30%	5.00	1.50				-		-		-
Proposer's comprehension of the required (work) Scope of Services	20%	5.00	1.00				-		-		-
Professional Qualifications	20%	5.00	1.00				-		-		-
Other (describe)											
Overall Ranking	100%		5.00				-		-		-

Vendor Selected:	John Gil, MD, Physician
Recommended By:	C Van Cott
Title:	Asst. Superintendent for Business
Date:	4/29/2024

RFP Assessment Comments, if needed:
 One proposal received from current School Physician. Recommendation is to award to Dr. John Gil.

Notes:
 * Percentage weights must add up to 100%. Price must be weighted the heaviest.
 ** Evaluated on a scale of 1 to 5: 1=worst, 5=best.
 *** Weight x Raw Score


 Christopher A. Van Cott

RFP Assessment Worksheet

School Years 2024-25 with options to extend

Page 1 of 1

Project or Service Description

Affordable Care Act TPA

Vendor Scoring (use additional worksheets if necessary)

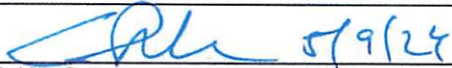
Selection Criteria	Weight*	US Benefits		Seneca					
		Raw Score**	Weighted Score***	Raw Score	Weighted Score	Raw Score	Weighted Score	Raw Score	Weighted Score
Cost \$	30%	4.66	1.40	5.00	1.50				
Professional Qualifications & Staffing	30%	5.00	1.50	5.00	1.50				
Demostrated Capabilites	20%	5.00	1.00	5.00	1.00				
Prior expericene with K-12 market	20%	5.00	1.00	5.00	1.00				
Other (describe)									
Overall Ranking	100%		4.90	5.00		-	-	-	-

Vendor Selected: **Seneca**
 Recommended By: C Van Cott
 Title: Asst. Superintendent for Business
 Date: 5/9/2024

RFP Assessment Comments, if needed:

Current provider of ACA TPA services, Seneca Consulting Group, provided proposal meeting District requirements at the lowest cost for 2024-25

Notes:
 * Percentage weights must add up to 100%. Price must be weighted the heaviest.
 ** Evaluated on a scale of 1 to 5: 1=worst, 5=best.
 *** Weight x Raw Score



Christopher A. Van Cott



The Seneca Group
960 Wheeler Road, #5367
Hauppauge, NY 11788

4/16/2024

Rocky Point Union Free School District
Administrative Office
90 Rocky Point - Yaphank Road
Rocky Point, NY 11778
Attn: Debra Hoffman, Purchasing Agent

Dear Christopher,

Enclosed please find our response to RFP #R25-06 Affordable Care Act Consultant. The proposal is single paged, non-bound.

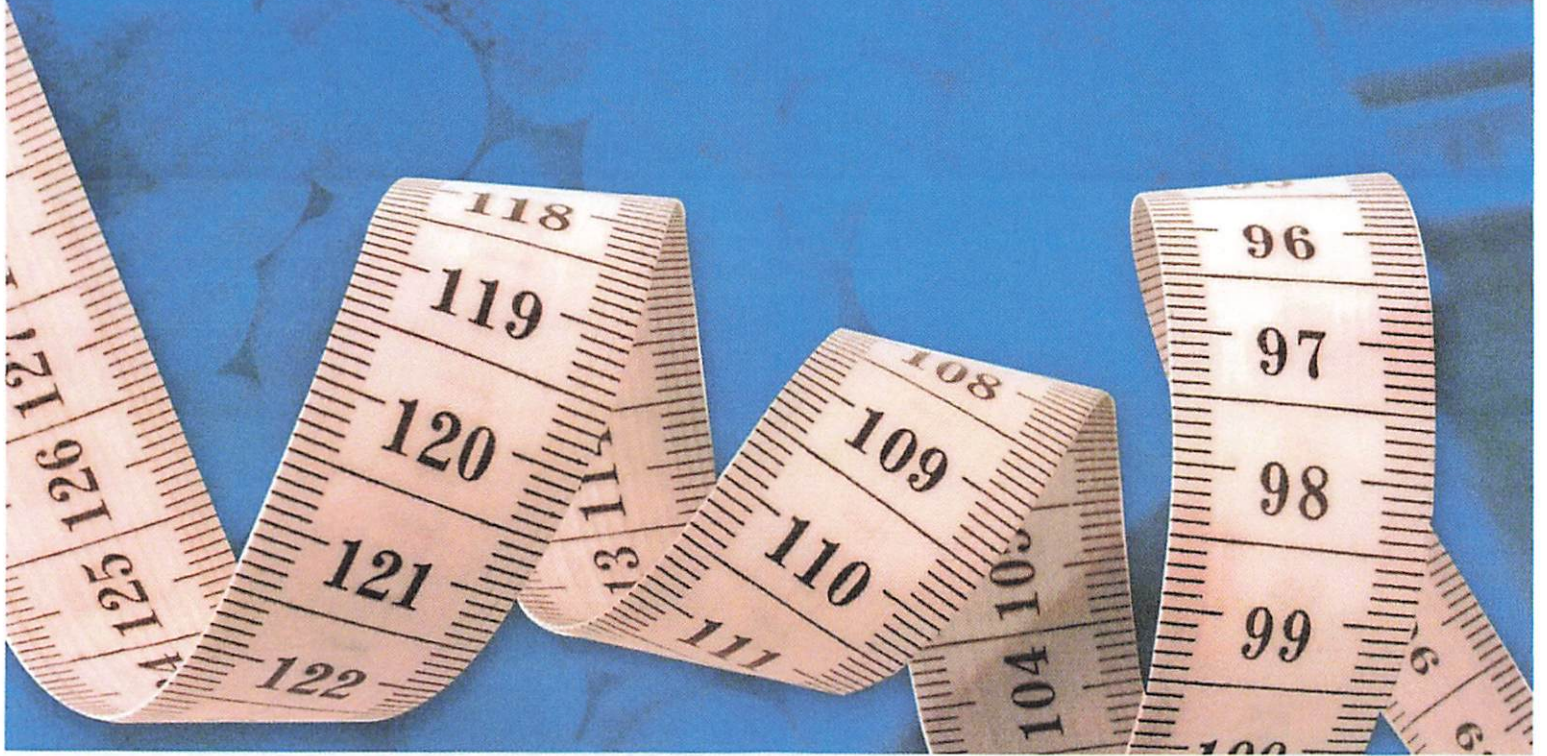
If you have any questions, please feel free to contact me directly.

Sincerely,

Daniel C. Opinante
President
631-240-4477

Seneca Consulting Group, Inc
960 Wheeler Road # 5367
Hauppauge, NY 11788
866-487-4157
www.senecaconsulting.com

Rocky Point Union Free School District
Affordable Care Act Consultants Proposal
May 8th 2024



Seneca Consulting Group

960 Wheeler Road, Suite 5367, Hauppauge, NY 11788
Telephone: 866-487-4157 | Fax: (631) 360-8288 | www.senecaconsulting.com

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Rocky Point Union Free School District

Affordable Care Act Consultants Proposal
May 8th 2024

Seneca Consulting Group, Inc.
960 Wheeler Road #5367
Hauppauge, NY 11788
Main: 866-487-4157
Fax: 724-1435
Dan@Senecaconsulting.com
Mr. Daniel C. Opinante
President

Table of Contents

Table of Contents.....2

 Letter of Transmittal.....3

Qualifications4

 Sample Suffolk County School District Clients:5

Affordable Care Act Reports and Frequency10

Cost Proposal12

Exhibit A – Sample Reports.....14

 Measurement Period Anomaly Report.....14

 Measurement Period Data Validation Report14

 Measurement Period Report14

 1095 Anomaly Report.....14

 IRS Error Report.....14

Appendix B16

 Non-Collusive Statement.....16

 Sexual Harassment Certification16



May 8th 2024

Ms. Debra Hoffman
Purchasing Agent
Rocky Point Union Free School District
90 Rocky Point-Yaphank Road
Rocky Point, NY 11788

Letter of Transmittal

The undersigned being sworn affirms under penalties of perjury that he has read and understands the terms of the RFP, has read, and approved this proposal submission, and is empowered to submit the Fee Proposal, and authorized to sign a contract with the Rocky Point Union Free School District. The proposal contained herein is a firm and irrevocable offer.

Seneca Risk Consulting Group has the pleasure of providing Rocky Point Union Free School District with Affordable Care Act consulting and administrations since 2014. During that time, Seneca Consulting Group has successfully tracked all employees of the District for the determination of Affordable Care Act Compliance. In addition, Seneca Consulting Group has produced, and e-filed with the IRS, thousands of IRS form 1095s on behalf of the District.

Seneca Risk Consulting Group as the skill, knowledge, and experience to provide Rocky Point Union Free School District with continued, and uninterrupted, Affordable Care Act consulting and reporting.

We have included details of our approach, the background of our company, timeline, pricing, and a sample client list, all herein. We believe that we have addressed all the questions and requirements from the RFQ. In closing this summary, we offer our experience in providing this service to over 100 Districts in both Suffolk and Nassau Counties. We have created a process that reduces the District's workload, and provides a highly accurate and inclusive product for supporting Rocky Point Union Free School District as their Patient Protection and Affordable Care Act (PPACA) Administrator/Consultant.

Sincerely,

Daniel C. Opinante
President

Qualifications

1. Provide the complete official name of the candidate firm as well as a brief description of its business activities and history for the past five (5) years.
2. Provide clear and specific information regarding how long the firm has been in business and the length of its experience in similar plan services for school districts.

"Seneca Consulting has been very responsive and attentive to the needs of the School District. The intricacies of ACA can be challenging but Dan Opinante goes out of his way to personally answer any questions in a timely manner to help ensure compliance"

*-Gary Dabrusky
Three Village
CSD*

Seneca Risk Consulting Group, LLC was founded in 1996 as an employee benefits consulting firm. For the past 28 years, our primary focus has been self-funded health plan consulting, auditing, and Affordable Care Act compliance and reporting. Our clients include school districts, school district consortiums, commercial employers, and multi-employer health and welfare funds.

Currently Seneca Risk Consulting Group, provides Affordable Care Act Consulting and IRS reporting services to over 100 school districts in New York, with the majority located in Nassau and Suffolk Counties.

We have the pleasure of working with many school districts on Long Island. For the past 18 years, we have been retained as the health care consultant for the Suffolk School Employees Health Plan (SSEHP www.sselhp.org). SSEHP is an Article 44 health plan, which provides benefits to the employees, retirees, and dependents of the Sayville School District, Smithtown School District, South Country School District, and Three Village School District.

Our experience in servicing public sector clients expands beyond our School District consulting practice. Seneca Risk Consulting Group clients also include the County of Suffolk Employee Medical Health Plan (EMHP), New York State Nurses Benefit Plan, Charlotte County, Town of Huntington, Town of North Hempstead, Chemung County Health Plan, and the Montana Health Payors Association, which includes the State of Montana Employees.

Our business model of "Audit Based Consulting" separates us from all other affordable care act consultants, regardless of size. We believe that our customer and data-centric approach provides a higher value, and better-quality consulting, than is available through any other company.

Our corporate office is in Hauppauge NY, and we have satellite offices in Matthews NC Our healthcare consulting service activities are performed out of our Hauppauge NY offices. Our claims administration, appeals, and care management services are performed from our Matthews NC office.

Sample Suffolk County School District Clients:

Amagansett UFSD	Islip UFSD	Sag Harbor UFSD
Amityville UFSD	Huntington UFSD	Sayville UFSD
Babylon UFSD	Kings Park CSD	Shoreham Wading River UFSD
Bayport-Blue Point UFSD	Lindenhurst UFSD	South Huntington UFSD
Brentwood UFSD	Middle County UFSD	Southampton Union Free School District
Connetquot CSD	Mount Sinai UFSD	Springs UFSD
Copliague UFSD	North Babylon UFSD	Seaford UFSD
Deer Park UFSD	Northport - East	Smithtown Central School District
East Hampton UFSD	Northport UFSD	Three Village CSD
Eastport South Manor	Miller Place UFSD	Tuckahoe Common UFSD
East Quogue	Patchogue Medford UFSD	West Babylon
Elwood UFSD	Port Jefferson	West Islip UFSD
Farmingdale	Riverhead UFSD	
Hauppauge UFSD	Rocky Point UFSD	
Harborfields UFSD	Roosevelt UFSD	
Half Hollow Hills UFSD	Sachem Central School District	

"Northport-East Northport Schools are quite satisfied with the work you and your company have provided us as you have been extremely responsive to us and have provided great support and guidance through the many changes that have occurred especially in these last few years."

-Irene McLaughlin
Northport-East
Northport Schools

3. Identify specifically the firm's professional staff members who will be assigned to this contract if it is awarded, the experience each possesses, and the location of the office from which the individuals will work. Provide a detailed biography and or resume outlining the experience and credentials of all such staff members.

Daniel C. Opinante
President, Seneca Consulting Group
960 Wheeler Road #5367
Hauppauge, NY 11788
Direct (631) 240-4477
Fax (631) 724-1435

Prior to founding Seneca Consulting Group, Mr. Opinante worked as a Senior Vice President for National Medical Healthcare Systems and as a Regional Sales Manager for Empire Blue Cross Blue Shield, as well as a large group representative for US Healthcare. During his thirty plus years working within the healthcare industry, Mr. Opinante has had many notable accomplishments. His primary responsibility during his tenure in the PBM industry was Business Development for the eastern United States. His

Seneca has made the reporting of ACA data simple for our district. It has been a pleasure to utilize their services for the past several years.

-Paul Defendini
Farmingdale
Schools

efforts contributed to his employer being named as the #1 fastest growing businesses in CRAINS, and the #4 fastest growing business in America.

Mr. Opinante has been very active in educational initiatives designed to help unveil the complexity of the benefit industry, and the Affordable Care Act. Mr. Opinante has completed The American College Essentials of Healthcare Reform HS 345, as well as The Healthcare Consultant in a post PPACA environment HS 346. In addition, Mr. Opinante was a featured speaker at the national Healthcare Reform Conference in 2011.

Jordan Catherman
Data Analyst, Seneca Consulting Group
960 Wheeler Road #5367
Hauppauge, NY 11788
Direct (631) 240-0904
Fax (631) 724-1435

Mr. Catherman is responsible for data management and programing for our ACA services. Mr. Catherman is a seasoned engineering professional with a Bachelor of Science in Industrial Engineering from Polytechnic Institute of New York. Software proficiency includes but not limited to Agile environment supporting software including JIRA and Greenhopper, CAD/CAM Software, MS SQL, VBA, SAP and MRP Systems

4. Provide a list of companies, including school districts, that your company provided similar service; including the dates of service and the name of the contact person at each identified client.

Account Name	First Name	Last Name	Dates of Service
Amagansett Union Free School District	Tom	Mager	2014- Present
Amityville UFSD	Olivia	Buatsi	2014- Present
Babylon UFSD	Deirdre	Lunetta	2014- Present
Baldwin Union Free School District	James	Robinson	2014- Present
Bayport-Blue Point Union Free School District	Louis	Frontario	2014- Present
Bellmore Union Free School District	Robin	Lufrano	2014- Present
Bellmore-Merrick Central High School District	Eric	Gomez	2014- Present
Brentwood Union Free School District	Nicole	Valente	2014- Present
Carle Place Union Free School District	Joanna	DeMartino	2014- Present
Carmel Central School District	Heather	Hastie	2014- Present
Center Moriches Union Free School District	Keri	Loughlin	2014- Present

Account Name	First Name	Last Name	Dates of Service
City School District of Glen Cove	Victoria	Galante	2014- Present
Connetquot Central School District Of Islip	Robert	Hauser	2014- Present
Copiague Union Free School District	Susan	Kanuika	2014- Present
Deer Park Union Free School District	Marguerite	Jimenez	2014- Present
East Hampton Union Free School District	Sam	Schneider	2014- Present
East Meadow Union Free School District	Anthony	Russo	2014- Present
East Rockaway Public Schools	Jacqueline	Scrio	2014- Present
Eastport South Manor CSD	Timothy	Laube	2014- Present
Elmont Union Free School	Al	Harper	2014- Present
Elwood Union Free School District	Lorraine	Dunkel	2014- Present
Farmingdale Union free School District	Michael	Motisi	2014- Present
Floral Park - Bellerose Union Free School District	Linda	Macias	2014- Present
Franklin Square Union Free School District	Michael	Goldberg	2014- Present
Freeport Union Free School District	James	Pappas	2014- Present
Garden City Union Free School District	Dana	Di Capua	2014- Present
Great Neck Public School District	John	O'Keefe	2014- Present
Half Hollow Hills Central School District	Anne Marie	Caliendo	2014- Present
Harborfields Csd Of Greenlawn	Sharon	Donnelly	2014- Present
Hauppauge Union Free School District	Anne	Scheppard	2014- Present
Herricks Union Free School District	Lisa	Rutkoske	2014- Present
Hewlett - Woodmere Union Free School District	Marie	Donnelly	2014- Present
Hicksville Public Schools	Marcy	Tannenbaum	2014- Present
Huntington Union Free School District	Kathleen	Acker	2014- Present
Island Trees Union Free School District	Susan	Hlavenka	2014- Present
Islip Union Free School District	Donna	Brower	2014- Present
Jericho Union Free School District	Victor	Manuel	2014- Present
Kings Park Central School District	Shannon	Meehan	2014- Present
Lawrence Union Free School District	Chanchal	Kumar	2014- Present
Levittown Union Free School District	Michael	Fabiano	2014- Present
Lindenhurst Union Free School District	Grace	Chan	2014- Present
Locust Valley Central School District	Toni	Meliambro	2014- Present
Malverne Union Free School District	Christopher	Caputo	2014- Present
Massapequa UFSD	Robert	Schilling	2014- Present

Account Name	First Name	Last Name	Dates of Service
Merrick Union Free School District	Ryan	Butler	2014- Present
Middle Country Central School District	Lisa	Lopardo	2014- Present
Miller Place Union Free School District	Colleen	Card	2014- Present
Mineola Union Free School District	Jack	Waters	2014- Present
Mount Sinai Union Free School District	Linda	Jensen	2014- Present
Mount Vernon City School District	Kenneth	Silver	2014- Present
North Babylon Union Free School District	Frank	Bacchi	2014- Present
North Bellmore Union Free School District	Jacqueline	Rehak	2014- Present
North Merrick Union Free School District	Thomas	McDaid	2014- Present
Northport-East Northport Schools	Irene	McLaughlin	2014- Present
Oceanside Union Free School District	Jerel	Cokley	2014- Present
Oyster Bay - East Norwich Central School District	Maureen	Raynor	2014- Present
Patchogue-Medford Union Free School District	Frank	Mazzie	2014- Present
Plainedge Union Free School District	Guy	Le Vaillant	2014- Present
Port Jefferson Union Free School District	Sean	Leister	2014- Present
Port Washington Union Free School District	Christopher	Shields	2014- Present
Riverhead Central School District	Marianne	Cartisano	2014- Present
Rockville Centre Union Free School District	Dana	Zawol	2014- Present
Rocky Point Union Free School District	Christopher	Van Cott	2014- Present
Roosevelt Union Free School District	Eric	Nezowitz	2014- Present
Roslyn Union Free School District	Michael	Goldspiel	2014- Present
Sachem Central School District At Holbrook	Michele	Psarakis	2014- Present
Sag Harbor Union Free School District	Jennifer	Buscemi	2014- Present
Sayville Union Free School District	Rhonda	Meserole	2014- Present
Seaford Union Free School District	Andrew	Casale	2014- Present
Sewanhaka Central High School District	Noah	Walker	2014- Present
Shoreham-Wading River Central School District	Brian	Heyward	2014- Present
Smithtown Central School District	Andrew	Tobin	2014- Present
South Country Central School District	Jennifer	Segui	2014- Present
South Huntington UFSD	Michael	Conway	2014- Present

Account Name	First Name	Last Name	Dates of Service
Southampton Union Free School District	Jean	Mingot	2014- Present
Springs Union Free School District	Michael	Henery	2014- Present
Syosset Central School District	Patricia	Rufo	2014- Present
Three Village Central School District	Gary	Dabrusky	2014- Present
Uniondale Union Free School District	Mary	Martinez-Lagnado	2014- Present
Valley Stream Union Free School District 30	Brian	Philips	2014- Present
Wantagh Union Free School District	Anthony	Cedrone	2014- Present
West Babylon Union Free School District	Denise	Gillis	2014- Present
West Islip Union Free School District	Elisa	Pellati	2014- Present
Westbury Union Free School District	Mary	O'Neill	2014- Present
William Floyd Union Free School District	David	Beggins	2014- Present
Williamsville Central School District	Lisa	Hinca	2014- Present
Wyandanch Union Free School District	Richard	Snyder	2014- Present
Town of Huntington	Daniel	Pagano	2014- Present
Suffolk School Employees Health Plan	Sheila	MacFadyen	2006- Present
Mecklenburg County	Deidre	Kirklan	2014- Present
New York State Nurses Benefit Fund	Christopher	Rosetti	2014- Present
Nederlander Production	Alyce	Cozzi	2016- Present
Shubert Theater Inc	Cathy	Cozens	2014- Present
Town of North Hempstead	Robert	Weitzer	2014- Present

5. Provide the name and title of the person or persons submitting this proposal, the firm's mail office address, the primary and secondary points of contact, their email address, telephone and fax numbers, including area codes.

Point of Contact	Name	Title	Address	Email	Phone
Primary	Daniel Opinante	President	960 Wheeler Road #5367 Hauppauge, NY 11788		631-240-4477
Secondary	Jordan Catherman	Data Analyst	960 Wheeler Road #5367 Hauppauge, NY 11788		631-240-0905

6. Describe the reports your company generates and how often they will provide to the district.

Seneca Risk Consulting Group supports both the Look Back Measurement Period method, as well as the monthly reconciliation method for compliance with the Affordable Care Act. Most applicable large employers utilize the "Look-Back Measurement Period" Method.

Methods Available:

Monthly Determination Method: Under the monthly determination method, Applicable Large Employers (ALE) must at the end of each calendar month, determine who worked 130 hours or more. These individuals would be considered Full-Time. Of the employees who worked 130 hours or more during that month, the ALE must then determine if they offered 95% with Minimum Essential Benefits. If the ALE failed to offer 95% of the employees that worked 130 hours or more, the ALE would be responsible to pay a penalty under §4980H (a) for that calendar month (\$214.16 for EVERY Full-time Employee). This process must be completed each calendar month, and then reported monthly on the 1095Cs and 1094C.

"Seneca is a valued partner for Sachem to help us ensure ACA compliance and proper reporting. They are extremely professional and a great resource."

-John O'Keefe
Sachem CSD

The monthly determination requirements create unpredictability and administrative challenges. The IRS identified these issues early on and, in a series of Notices, outlined and refined potential safe harbors that would allow employers to identify full-time employees by calculating employees' hours during a specified period of months (a measurement period) and then locking in that status (full-time or not) for a separate specified period (a stability period). These concepts are retained in the proposed regulations, with additional modifications.

Look Back Measurement Period: After the IRS received comments from ALE that the original Monthly Reconciliation Method is too labor some, the IRS release the Measurement Period Save Harbor through IRS Notice 2011-36. The Look Back Measurement Period Safe Harbor allows ALE to determine an individual's FT/PT status once per year at the start of the Measurement period, and that FT/PT Status remains throughout the ALE Stability Period. The Only time an individual's FT/PT status would change during the Measurement Period is if the employee has terminated their employment, or if a new Variable Hour employee has satisfied their initial Measurement Period.

In addition, the IRS established criteria and Parameters for ALE who elect the Look Back Measurement Period Safe Harbor:

Safe Harbor Terminology

The safe harbors use the following defined terms:

- A “measurement period” is the look-back period over which hours are calculated to determine whether an employee has averaged at least 30 hours per week. There are two types of measurement periods: standard measurement periods and initial measurement periods.
- The “standard measurement period” is used for ongoing employees.
- The “initial measurement period” is used for new employees.
- The “stability period” is the look-forward period for which an employee’s status (determined during the measurement period as full-time or not) is locked in, regardless of the employee’s actual hours during this period (provided that the employee continues to be an employee during this period). The stability period begins at the end of the measurement period (and any administrative period if the employer elects to have one).
- The “administrative period” is a period after the end of a measurement period – and before the beginning of the next stability period – during which the employer can perform administrative tasks, such as calculating the hours for the measurement period, determining eligibility for coverage, providing enrollment materials to eligible employees, and conducting open enrollment.
- An “ongoing employee” is an employee who has been employed for at least one complete standard measurement period.
- A “new employee” is an employee who has not been employed for at least one complete standard measurement period.
- An employee is a “variable-hour employee” if it cannot be determined on the employee’s start date that the employee is reasonably expected to work an average of at least 30 hours per week during the initial measurement period (based on the facts and circumstances on the employee’s start date).

Safe Harbor Parameters for Ongoing Employees

Criterion	Parameters
Standard measurement period	At least three and not more than 12 consecutive calendar months <ul style="list-style-type: none"> • Employer can choose the months when the standard measurement period starts and ends, such as the calendar year, plan year, or the period ending just before open enrollment starts. • Must be uniform for all employees in same category. There are four permissible categories: collectively bargained and non-collectively bargained employees, employees covered by different collective-bargaining agreements, salaried or hourly employees, and primary places of employment in different states.
Stability period	If the employee averages at least 30 hours per week in the standard measurement period, the stability period begins immediately after the end of the standard measurement period and any applicable administrative period and is the longer of – <ul style="list-style-type: none"> - Six consecutive calendar months - The length of the standard measurement period

	<ul style="list-style-type: none"> If the employee does not average at least 30 hours per week in the standard measurement period, the stability period must begin immediately after the end of the standard measurement period and any applicable administrative period and cannot be longer than the standard measurement period.
Change in employment status	If an ongoing employee's employment status changes before the end of a stability period, the change will not affect the classification of the employee as a full-time employee (or not a full-time employee) for the remaining portion of the stability period.
Administrative period	Up to 90 days. To prevent the administrative period from creating a gap in coverage, the administrative period must overlap with the prior stability period (that is, full-time employees enrolled in coverage based on a prior measurement period must continue to be covered through the administrative period connected to a more recent measurement period).
Ongoing employee	An "ongoing employee" is an employee who has been employed for at least one complete standard measurement period
New employee	A "new employee" is an employee who has not been employed for at least one complete standard measurement period
Variable-hour employee"	An employee is a "variable-hour employee" if it cannot be determined on the employee's start date that the employee is reasonably expected to work an average of at least 30 hours per week during the initial measurement period (based on the facts and circumstances on the employee's start date).

Safe Harbor Parameters for New Employees

If an employee is reasonably expected at his or her start date to be a full-time employee (i.e., work on average at least 30 hours or more per week) and is not a seasonal employee, **the look-back and stability period safe harbors do not apply**. If an applicable large employer does not offer coverage to such an employee by the end of the employee's initial three full calendar months of employment, the employer may be subject to a penalty for those first three months as well as for any subsequent months of employment for which coverage is not offered.

Safe Harbor Parameters for New Employees

New Non-Variable-Hour and Non-Seasonal Employees

If an employee is reasonably expected at his or her start date to be a full-time employee (i.e., work on average at least 30 hours or more per week) and is not a seasonal employee, the look-back and stability period safe harbors do not apply. If an applicable large employer does not offer coverage to such employee by the end of the employee's initial three full calendar months of employment, the employer may be subject to a penalty for those first three months as well as for any subsequent months of employment for which coverage is not offered.

The following rules apply to the safe harbor for new variable-hour and seasonal employees.

Criterion	Parameters
Initial measurement period	<p>At least 3 and not more than 12 consecutive calendar months beginning on any date between the employee's start date and first day of the first calendar month after the start date</p> <ul style="list-style-type: none"> • Must be uniform for all employees in same category. There are four permissible categories: collectively bargained and no collectively bargained employees, employees covered by different collective-bargaining agreements, salaried or hourly employees, and primary places of employment in different states
Stability period	<p>The stability period must be the same length as for ongoing employees</p> <ul style="list-style-type: none"> • If the employee averages at least 30 hours per week in the initial measurement period, the stability period begins immediately after the end of the initial measurement period and any associated administrative period and is the longer of – <ul style="list-style-type: none"> - Six consecutive calendar months - The length of the standard measurement period • If the employee does not average at least 30 hours per week in the initial measurement period, the stability period cannot be more than one month longer than the initial measurement period and must not exceed the remainder of the standard measurement period (plus any associated administrative period) in which the initial measurement period ends.
Change in employment status	<p>If the employment position or employment status of a new variable-hour or seasonal employee materially changes before the end of the initial measurement period in such a way that, if the employee had begun employment in the new position or status, the employee reasonably would have been expected to average at least 30 hours of service per week (i.e., would not have been treated as a variable-hour employee), the employee will be considered a full-time employee on –</p> <ul style="list-style-type: none"> • the first day of the fourth month following the change in employment status, or • if earlier and the employee averages at least 30 hours of service per week during the initial measurement period, the first day of the first month following the end of the initial measurement period (including any optional administrative period associated with the initial measurement period).
Administrative period	<p>Up to 90 days, subject to the following –</p> <ul style="list-style-type: none"> • Includes all periods from the start date to the date coverage starts under the plan, except for the initial measurement period

	<ul style="list-style-type: none"> • In combination with the initial measurement period, cannot extend past the last day of the first calendar month that begins on or after the one-year anniversary of the employee's start date
--	---

Employee "Position" as it relates to Compliance under the Affordable Care Act

"Very knowledgeable on ever changing regulations."

"Works with clients and understands each school operates differently."

"Streamlines the process so Business Officials can concentrate on other matters."

Sean Leister-
Port Jefferson
Schools

In evaluating the two options available for Applicable Large Employers to comply with the Employer Shared Savings Requirements (Employer Mandate), you will notice that neither the Monthly Reconciliation Method, or the Look Back Measurement Period Method mentions and employee "Position". Prior to the implementation of the Affordable Care Act in 2010, most employers decided if an individual is Full-time based on the Position that they held. For compliance with the Employer Shared Savings Requirements (Employer Mandate), the only determination used for an individual's Full-time - Part time status is the number of hours worked.

Under the Monthly Reconciliation Method, an employee is "Full-Time" the month that they work more than 130 hours. When using the Look Back Measurement Period Method, and individuals "Full-time" / "Part-Time" status will only change at the end of the Measurement Period then the individual has averaged more than 130 hours during that Measurement Period, and that status will be "Locked in" during the entire Stability period regardless of the hours worked during the Stability Period.

Affordable Care Act Reports and Frequency

Seneca's goal in supporting of clients is to reduce the workload of clients' staff. As such, we provide our standard measurement period reporting and tacking based on the needs of our clients. We can support monthly reporting; however, our recommendations are implementing the "Look-Back" measurement period methodology and evaluate compliance with the act three (3) times per year. This will reduce the client staffing workload by a factor of 4.

September 15th

Data Request to Include:

- After Checks Printed Payroll Register
- Complete Employee Personnel File Report
- Contract and Rate Report

Goal:

- Update Term Dates for employee who termed prior to September 15th.
- Update Employee single contribution percentage that may have changed in July.

November 15th

Data Request to Include:

- After Checks Printed Payroll Register
- Complete Employee Personnel File Report
- Contract and Rate Report

Goal:

- Update Term Dates for employee who termed prior to November 15th.
- Update Employee single contribution percentage that may have changed.

Milestone:

- Complete Measurement Period Report
- Start of Administrative Period to identify and offer individuals coverage.

January 5th

Data Request to Include:

- After Checks Printed Payroll Register
- Complete Employee Personnel File Report
- Contract and Rate Report
- Health Plan Enrollment Report for Calendar year

Goal:

- Update Term Dates for employee who termed prior to December 31st
- Provide Draft 1095C & 1095B for Amagansett Union Free School District to review and approve.

February 15th

Final Form Approval Due

March 1st

Forms Distributed to individuals.

March 31st

IRS AIR Filing Due

Cost Proposal

District	Rocky Point Union Free School District			
Contract Term	2024-2025	2025-2026	2026-2027	2027-2028
Payroll System	nVision	nVision	nVision	nVision
Set up fees	\$0	\$0	\$0	\$0
Travel Expense	\$0	\$0	\$0	\$0
\$6056 Reporting (Employer Mandate)	\$11,672.50	\$11,847.59	\$12,025.30	\$12,205.68
\$6055 Reporting (Self-Funding Reporting)	INCLUDED	INCLUDED	INCLUDED	INCLUDED
Total Annual Fee¹	\$11,672.50	\$11,847.59	\$12,025.30	\$12,205.68
1095 Form Printing and Mailing fee (Optional)	\$0.76 + Postage Per Form	\$0.77 + Postage Per Form	\$0.78 + Postage Per Form	\$0.79 + Postage Per Form
Health Plan	NYSHIP	NYSHIP	NYSHIP	NYSHIP
Full-Time / Part-Time Determination	Measurement Period Safe Harbor	Measurement Period Safe Harbor	Measurement Period Safe Harbor	Measurement Period Safe Harbor

Measurement Period Safe Harbor Assumptions

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

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

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

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

¹ Invoiced once upon execution of the contract, upon receiving DRAFT 1095 forms, final payment due upon completion of IRS e-file.



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


Signature 
 Print Name Daniel C. Opinante
 Title President
 Company Name Seneca Consulting Group, Inc.
 Date 5/8/2024

Exhibit A - Sample Reports

Measurement Period Anomaly Report
Measurement Period Data Validation Report
Measurement Period Report
1095 Anomaly Report
IRS Error Report

Measurement Period Data Validation Report: This report includes the employee contribution percentages we are currently using for your District. Please review the contribution percentages (Contrib%) to ensure that the correct contributions are being used. If there was a change in the employee contribution, please highlight the appropriate row and return with the correct value.

The Measurement Period Data Validation Report also lists the district's payroll earning codes, and the conversion factor that we are using to determine the hours worked. Please review, and if changes are needed, please highlight the appropriate row and return.

If the employee contribution and payroll earning code conversion values are correct, please sign and return the last page of the report.

***The values used on the Data Validation Report, are the values that we use to produce the District Measurement Period Report, and then the IRS Form 1095. If the values on this report is incorrect, then the values on the Measurement Period Report, and the 1095 forms are incorrect.*

Approved Data Validation Required Prior to the Production of Final IRS 1095 Forms.

Measurement Period Anomaly Report: This report includes potential data anomalies that we would like the District to review.

Description of Anomaly - The Value is not "FT" of "PT": This anomaly is a result of an employee having a termination date prior to the current tax year. These employees received payroll compensation after start of tax year. If these employees were either rehired, or is still actively at work, please review the termination date, and rehire date listed in FM/Nvision. If the employees were termed prior to tax year, not action is required.

Measurement Period Report - Full Time Not Offered: Please review the Full-time not offered tab on the measurement period report. These employees are individuals that we have identified as potentially working more than 130 hours per month and were not offered insurance based on their current position. If any of these employees were offered insurance,

either as a retiree or active employee, please identify who was offered, and provide their contribution percentage towards single coverage.

Appendix B

Non-Collusive Statement

Conflict of Interest Certification

Iran Divestment

Sexual Harassment Certification



2023 MPR Data Validation and Acceptance

Page 1 of 10

Rocky Point UFSD

11-6001713

MPR Version: v3

Report Date: Friday, January 19, 2024

MPR Date Range

11/1/2022 To 10/31/2023

Contact Person: Susan Crossan

Contact Person Phone #: 631-849-7568

Please validate the employee contribution, towards single coverage, of the lowest Minimum Essential Health plan offered for the current tax year. In addition, please validate current monthly premium cost for the lowest Essential Health plan offered for the current tax year.

Rocky Point UFSD

11-6001713

MPR Version: v3 Report Date: Friday, January 19, 2024

Employee Types Table - Definitions:

Field Name	Field Value	Definition
EMP Group	ANY	Employee Group as defined by employer's employee listing
EMPTYTYPE	ANY	Employee Position, or titled defined by employer's employee listing
Description	ANY	Description of the employee type listed in the "EMPTYTYPE" field.
Offered	ANY	Indicates whether or not the employee was offered health insurance, Y (Yes) or N (No)
PRIORContrib%	ANY	Last years employee contribution requirement towards single coverage of the lowest cost health plan offered to the employee
NEWContrib%	ANY	This years employee contribution requirement towards single coverage of the lowest cost health plan offered to the employee
Contrib%	ANY	The employees contribution requirement towards single coverage of the lowest cost health plan offered to the employee use for the 1095 reporting. May be the average if contribution % changed during the IRS reporting Period
Variable	Y	Variable hour employee, who is typically not offered health insurance, or is offered only if they meet certain criteria. Variable hour employee are typically paid on either an hourly basis, per diem, or stipend.
	N	Not a Variable Hour Employee. Non-variable hour employees are typically full-time employees who are on salary and offered insurance.
HRS/Day	ANY	Hours per day the employee works to be considered Full-time.
MVPLAN	ANY	Name of the lowest cost, Minimum Value health plan offered to the Employee
MVRATE	ANY	The full monthly premium cost for single coverage of the lowest cost, Minimum Value health plan offered to the Employee.
Notes	ANY	Specific requirements of employee offer of insurance (i.e.: contribution rates based on employees hire date, or salary requirements)

Employee Types Data:

EMP GROUP	EMPTYTYPE	Description	OFFERED	PriorContrib%	NewContrib%	CONTRIB%	VARIABLE	HRS/DAY	MVPLAN	MVRATE	Notes
ADMIN EXEC	ASSISTANT SUPERINTENDENT FOR BUSINESS	Not Supplied	Y	0	0	0	N	8	NYSHIP	\$1,326.70	
ADMIN EXEC	ASST SUPERINTENDENT	Not Supplied	Y	0	0	0	N	8	NYSHIP	\$1,326.70	
ADMIN EXEC	EXEC DIR FOR EDUCATIONAL SERVICES	Not Supplied	Y	0.1	0.1	0.1	N	8	NYSHIP	\$1,326.70	
ADMIN EXEC	EXEC DIR OF PUPIL PERSONNEL SERVICES	Not Supplied	Y	0.1	0.1	0.1	N	8	NYSHIP	\$1,326.70	
ADMIN EXEC	SUPERINTENDENT	Not Supplied	Y	0	0	0	N	8	NYSHIP	\$1,326.70	
ADMINISTRATION	ASST DIRECTOR OF PUPIL PERSONNEL SERVICES	Not Supplied	Y	0.1	0.1	0.1	N	8	NYSHIP	\$1,326.70	
ADMINISTRATION	ASST DIRECTOR OF SPECIAL EDUCATION	Not Supplied	Y	0.1	0.1	0.1	N	8	NYSHIP	\$1,326.70	1/18/2024

Rocky Point UFSD

11-6001713

MPR Version: v3 **Report Date: Friday, January 19, 2024**

Employee Types Data:

EMP GROUP	EMPTYPE	Description	OFFERED	PriorContrib%	NewContrib%	CONTRIB%	VARIABLE	HRS/DAY	MVPLAN	MVRATE	Notes
ADMINISTRATION	ASST PRINCIPAL	Not Supplied	Y	0.1	0.1	0.1	N	8	NYSHIP	\$1,326.70	
ADMINISTRATION	DIRECTOR OF HUMANITTES	Not Supplied	Y	0.1	0.1	0.1	N	8	NYSHIP	\$1,326.70	
ADMINISTRATION	DIRECTOR OF MST	Not Supplied	Y	0.1	0.1	0.1	N	8	NYSHIP	\$1,326.70	
ADMINISTRATION	DIRECTOR OF SPEC ED	Not Supplied	Y	0.1	0.1	0.1	N	8	NYSHIP	\$1,326.70	
ADMINISTRATION	PRINCIPAL	Not Supplied	Y	0.1	0.1	0.1	N	8	NYSHIP	\$1,326.70	
ADMINISTRATION<7 /1/2021	ASST DIRECTOR OF PUPIL PERSONNEL SERVICES	DOH>7/1/2021 18%	Y	0.18	0.18	0.18	N	8	NYSHIP	\$1,326.70	
ADMINISTRATION<7 /1/2021	ASST PRINCIPAL	DOH>7/1/2021 18%	Y	0.18	0.18	0.18	N	8	NYSHIP	\$1,326.70	
ADMINISTRATION<7 /1/2021	DIRECTOR OF ATHLETICS	DOH>7/1/2021 18%	Y	0.18	0.18	0.18	N	8	NYSHIP	\$1,326.70	
ADMINISTRATION>8 /11/2023	DIRECTOR OF TECHNOLOGY	Not Supplied	Y	0.18	0.18	0.18	N	8	NYSHIP	\$1,326.70	1/19/2024
B&G	CUSTODIAL WORKER I	Not Supplied	Y	0.15	0.15	0.15	N	8	NYSHIP	\$1,326.70	
B&G	CUSTODIAL WORKER III	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	8/24/2023
B&G	GROUNDSKEEPER I	Not Supplied	Y	0.15	0.15	0.15	N	8	NYSHIP	\$1,326.70	
B&G	GROUNDSKEEPER II	Not Supplied	Y	0.15	0.15	0.15	N	8	NYSHIP	\$1,326.70	
B&G	GUARD	Not Supplied	Y	0.15	0.15	0.15	Y	7	NYSHIP	\$1,326.70	
B&G	HEAD CUSTODIAN	Not Supplied	Y	0.15	0.15	0.15	N	8	NYSHIP	\$1,326.70	
B&G	MAINTENANCE MECHANIC II	Not Supplied	Y	0.15	0.15	0.15	Y	7	NYSHIP	\$1,326.70	
B&G	MAINTENANCE MECHANIC III	Not Supplied	Y	0.15	0.15	0.15	Y	7	NYSHIP	\$1,326.70	
B&G	P/T CUSTODIAL WORKER I	Not Supplied	N	1	1	1	Y	7		\$0.00	
B&G	P/T CUSTODIAN	Not Supplied	N	1	1	1	Y	7		\$0.00	
B&G	P/T GUARD	Not Supplied	N	1	1	1	Y	7		\$0.00	
B&G	P/T MAINT MECH II	Not Supplied	N	1	1	1	Y	7		\$0.00	
B&G	SECURITY	Not Supplied	Y	0.15	0.15	0.15	Y	7	NYSHIP	\$1,326.70	1/18/2024
B&G	SENIOR GUARD	Not Supplied	Y	0.15	0.15	0.15	Y	8	NYSHIP	\$1,326.70	
CLERICAL	ACCOUNT CLERK	Not Supplied	Y	0.15	0.15	0.15	N	8	NYSHIP	\$1,326.70	
CLERICAL	ACCOUNTANT	Not Supplied	Y	0.15	0.15	0.15	N	8	NYSHIP	\$1,326.70	

Rocky Point UFSD

11-6001713

MPR Version: v3	Report Date: Friday, January 19, 2024
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Employee Types Data:

EMP GROUP	EMPTYPE	Description	OFFERED	PriorContrib%	NewContrib%	CONTRIB%	VARIABLE	HRS/DAY	MVPLAN	MVRATE	Notes
CLERICAL	OFFICE APLICATIONS SPECIALIST	Not Supplied	Y	0.15	0.15	0.15	N	8	NYSHIP	\$1,326.70	
CLERICAL	OFFICE ASSISTANT	Not Supplied	Y	0.15	0.15	0.15	N	8	NYSHIP	\$1,326.70	
CLERICAL	P/T OFFICE ASSISTANT	Not Supplied	N	1	1	1	Y	7		\$0.00	
CLERICAL	PRINCIPAL ACCOUNT CLERK	Not Supplied	Y	0.15	0.15	0.15	N	8	NYSHIP	\$1,326.70	
CLERICAL	PRINCIPAL OFFICE ASSISTANT	Not Supplied	Y	0.15	0.15	0.15	N	8	NYSHIP	\$1,326.70	
CLERICAL	PRINCIPAL STENOGRAPHER	Not Supplied	Y	0.15	0.15	0.15	N	8	NYSHIP	\$1,326.70	
CLERICAL	SECRETARIAL ASSISTANT	Not Supplied	Y	0.15	0.15	0.15	N	8	NYSHIP	\$1,326.70	
CLERICAL	SENIOR OFFICE ASSISTANT	Not Supplied	Y	0.15	0.15	0.15	N	8	NYSHIP	\$1,326.70	
CLERICAL	SENIOR ACCOUNT CLERK	Not Supplied	Y	0.15	0.15	0.15	N	8	NYSHIP	\$1,326.70	
CLERICAL	SENIOR OFFICE ASSISTANT	Not Supplied	Y	0.15	0.15	0.15	N	8	NYSHIP	\$1,326.70	
CLERICAL	SENIOR OFFICE ASSISTANT-SPANISH	Not Supplied	Y	0.15	0.15	0.15	N	8	NYSHIP	\$1,326.70	
COACH	ATHLETIC TRAINER	Not Supplied	N	1	1	1	Y	7		\$0.00	
COACH	COACH	Not Supplied	N	1	1	1	Y	7		\$0.00	
COMED	COMMUNITY ED	Not Supplied	N	1	1	1	Y	7		\$0.00	
COMED	DRIVER'S ED	Not Supplied	N	1	1	1	Y	7		\$0.00	
COMED	None Assigned	Not Supplied	N	1	1	1	Y	7		\$0.00	
COMMUNICATIONS	P/T SCHOOL COMM COORD	Not Supplied	N	1	1	1	Y	7		\$0.00	
CONFIDENTIAL	DIRECTOR OF FACILITIES III	Not Supplied	Y	0.15	0.15	0.15	N	8	NYSHIP	\$1,326.70	
CONFIDENTIAL	PRINCIPAL OFFICE ASSISTANT	Not Supplied	Y	0.15	0.15	0.15	N	8	NYSHIP	\$1,326.70	
CONFIDENTIAL	SCHOOL DISTRICT TREASURER	Not Supplied	Y	0	0	0	N	8	NYSHIP	\$1,326.70	
CONFIDENTIAL	SENIOR ACCOUNT CLERK	Not Supplied	Y	0	0	0	N	8	NYSHIP	\$1,326.70	
CONFIDENTIAL<7/1/2021	NETWORK & SYSTEMS SPECIALIST II	DOH>7/1/2021 18%	Y	0.18	0.18	0.18	N	8		\$1,326.70	
CONFIDENTIAL<7/1/2021	SCHOOL LUNCH MANAGER	DOH>7/1/2021 18%	Y	0.18	0.18	0.18	N	8	NYSHIP	\$1,326.70	
FOOD SERVICE	ASSISTANT COOK	Not Supplied	Y	0.154	0.154	0.154	Y	7	NYSHIP	\$1,326.70	
FOOD SERVICE	FOOD SERVICE WORKER	Not Supplied	N	1	1	1	Y	7		\$0.00	

Rocky Point UFSD

11-6001713

MPR Version: v3 **Report Date: Friday, January 19, 2024**

Employee Types Data:

EMP GROUP	EMPTYPE	Description	OFFERED	PriorContrib%	NewContrib%	CONTRIB%	VARIABLE	HRS/DAY	MVPLAN	MVRATE	Notes
FOOD SERVICE	LEAD FOOD SERVICE WORKER	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
FOOD SERVICE	P/T FOOD SERVICE WORKER	Not Supplied	N	1	1	1	Y	7		\$0.00	8/24/2023
HALL MONITOR	SCHOOL HALL MONITOR	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
HEALTH AIDE	SCHOOL HEALTH AIDE	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
MONITOR	P/T HALL MONITOR	Not Supplied	N	1	1	1	Y	7		\$0.00	
MONITOR	P/T LUNCH MONITOR	Not Supplied	N	1	1	1	Y	7		\$0.00	
MONITOR	P/T SCHOOL LUNCH MONITOR	Not Supplied	N	1	1	1	Y	7		\$0.00	
MONITOR	P/T SCHOOL LUNCH MONITOR	Not Supplied	N	1	1	1	Y	7		\$0.00	1/18/2024
MONITOR	PT HALL MONITOR	Not Supplied	N	1	1	1	Y	7		\$0.00	
MONITOR	SCHOOL HALL MONITOR	Not Supplied	N	1	1	1	Y	7		\$0.00	1/18/2024
MONITOR	SCHOOL LUNCH MONITOR	Not Supplied	N	1	1	1	Y	7		\$0.00	
N/A	Daily SUB	Not Supplied	N	1	1	1	Y	7		\$0.00	
N/A	None Assigned	Not Supplied	N	1	1	1	Y	7		\$0.00	
NURSE	SCHOOL NURSE	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
RETIRED	RETIRED	Not Supplied	N	1	1	1	Y	7		\$0.00	
SUB INSTRUCT	SUB TEACHER/TEACHER AIDE	Not Supplied	N	1	1	1	Y	7		\$0.00	1/18/2024
SUB INSTRUCT	SUB TEACHER/TEACHER ASST	Not Supplied	N	1	1	1	Y	7		\$0.00	
SUB INSTRUCT	SUB TEACHER/TEACHING ASST	Not Supplied	N	1	1	1	Y	7		\$0.00	8/24/2023
SUB INSTRUCT	SUB TEACHER/TEACHING ASST	Not Supplied	N	1	1	1	Y	7		\$0.00	
SUB INSTRUCT	SUB TEACHER/TEACHING ASST.	Not Supplied	N	1	1	1	Y	7		\$0.00	1/18/2024
SUB INSTRUCT	SUBSTITUTE TEACHER/TEACHING ASST.	Not Supplied	N	1	1	1	Y	7		\$0.00	1/18/2024
SUB NONINSTRUCT	SUB CUSTODIAN	Not Supplied	N	1	1	1	Y	7		\$0.00	8/24/2023
SUB NONINSTRUCT	SUB CLERICAL	Not Supplied	N	1	1	1	Y	7		\$0.00	
SUB NONINSTRUCT	SUB CUSTODIAL	Not Supplied	N	1	1	1	Y	7		\$0.00	
SUB NONINSTRUCT	SUB CUSTODIAN	Not Supplied	N	1	1	1	Y	7		\$0.00	

Rocky Point UFSD

11-6001713

MPR Version: v3

Report Date: Friday, January 19, 2024

Employee Types Data:

EMP GROUP	EMPTYPE	Description	OFFERED	PriorContrib%	NewContrib%	CONTRIB%	VARIABLE	HRS/DAY	MVPLAN	MVRATE	Notes
SUB NONINSTRUCT	SUB FOOD SERVICE WORKER	Not Supplied	N	1	1	1	Y	7		\$0.00	
SUB NONINSTRUCT	SUB GUARD	Not Supplied	N	1	1	1	Y	7		\$0.00	
SUB NONINSTRUCT	SUB NURSE	Not Supplied	N	1	1	1	Y	7		\$0.00	
SUB NONINSTRUCT	SUB SCHOOL COMMUNICATIONS COORD	Not Supplied	N	1	1	1	Y	7		\$0.00	
SUB NONINSTRUCT	SUB SECURITY	Not Supplied	N	1	1	1	Y	7		\$0.00	
SUB NONINSTRUCT	SUB TEACHER AIDE/MONITOR	Not Supplied	N	1	1	1	Y	7		\$0.00	
SUB NONINSTRUCT	SUBSTITUTE GUARD	Not Supplied	N	1	1	1	Y	7		\$0.00	1/18/2024
SUB NONINSTRUCT	SUBSTITUTE SECURITY GUARD	Not Supplied	N	1	1	1	Y	7		\$0.00	8/24/2023
SUB NONINSTRUCT	SUBSTITUTE TEACHER AIDE/MONITOR	Not Supplied	N	1	1	1	Y	7		\$0.00	8/24/2023
TEACHER	ART	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	BEHAVIORAL CONSULTANT	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	BUSINESS	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	COSMETOLOGY	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	ELA	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	ELA/ENL	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	ENL	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	FACS	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	GUIDANCE COUNSELOR	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	HEALTH 7-12	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	K-6	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	LIBRARY	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	LOTE	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	MATH	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	MUSIC	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	PE	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	READING	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	

Rocky Point UFSD

11-6001713

MPR Version: v3 Report Date: Friday, January 19, 2024

Employee Types Data:

EMP GROUP	EMPTYTYPE	Description	OFFERED	PriorContrib%	NewContrib%	CONTRIB%	VARIABLE	HRS/DAY	MVPLAN	MVRATE	Notes
TEACHER	SCHOOL COUNSELOR	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	SCHOOL PSYCHOLOGIST	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	SCIENCE	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	SOCIAL STUDIES	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	SOCIAL WORKER	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	SPECIAL ED 7-12	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	SPECIAL ED K-6	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	SPECIAL EDUCATION TEACHER	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	1/18/2024
TEACHER	SPEECH	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER	TEACHER	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	1/18/2024
TEACHER	TECHNOLOGY	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHER AIDE	None Assigned	Not Supplied	N	1	1	1	Y	7		\$0.00	1/18/2024
TEACHER AIDE	P/T SCHOOL ATTENDANCE AIDE	Not Supplied	N	1	1	1	Y	7		\$0.00	
TEACHER AIDE	SCHOOL TEACHER AIDE	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	1/18/2024
TEACHER AIDE	TEACHER AIDE	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	
TEACHING ASST	TEACHING ASST	Not Supplied	Y	0.15	0.15	0.15	N	7	NYSHIP	\$1,326.70	

Rocky Point UFSD

11-6001713

MPR Version: v3 **Report Date: Friday, January 19, 2024**

Earnings Codes Table - Definitions:

Field Name	Field Value	Definition
Earning Code	ANY	Payroll earning code used by the employer
Earning Description	ANY	Description of the payroll Earning Code used by the employer
Service	Y	Earning Code represents service performed by the employee that represents service hours as per the ACA. (ie: Salary, Hourly pay, Per diem pay)
	N	Earning Code does not represent service performed by the employee that represents service hours as per the ACA. (ie: Health premium reimbursement, longevity payments, Retroactive pay adjustments)
	U	Earning Code represents service performed by the employee that represents service hours as per the ACA, that cannot be converted using the IRS hours, days, or week worked guidance. (Stipend payments)
Conversion	ANY	Unit conversion rate to determined hours worked by the employee (ie: 1 for hourly compensation, 7 for per diem compensation)

Earning Codes Data:

Earning	Earning Description	SERVICE	CONVERSION	NOTES
ADDLSUPR	ADD'L SUPERVISION	Y	1	
ALC	RPSSS ALC	Y	1	
ALLOW	Contractual Allowance	N	0	
CHAIRPER	CHAIR PERSON	N	0	
CHAPER	CHAPERONE PAY	Y	2.5	
CLASSCOV	CLASS COVERAGE	Y	0.02	
CLKSTIP	Clerical Stipend 26 pay	U	0	
CLUB	CLUBS	U	0	
COACH	COACHES STIPEND	U	0	
COMMED	COMMUNITY EDUCATION	Y	1	
COMP-TIM	COMPENSATORY TIME	N	0	
CONTRACT	CONTRACTUAL EARNING	Y	70	
CORD	COORDINATOR	N	0	
CREDREC	Credit Recovery	N	0	
CSECOV	CSE COVERAGE	Y	1	
CURRWRT	CURRICULUM WRITING	Y	1	
DETENTNM	DETENTION MS	U	0	
DISTCLK	DISTRICT CLERK	N	0	
DOCKED	DOCKED PAY	N	0	

Rocky Point UFSD
11-6001713

MPR Version: v3	Report Date: Friday, January 19, 2024
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Earning Codes Data:

Earning	Earning Description	SERVICE	CONVERSION	NOTES
HCWB	Health Care Worker Bonus	N	0	
HOMETEA	HOME TEACHING	Y	1	
INSBBACK	INSURANCE BUY BACK	N	0	
INTERIM	INTERIN PRINCIPAL	Y	0	
INTRAMUR	INTRAMURALS	Y	1	
LNCHDUTY	LUNCH DUTY	U	1	
LONG	LONGEVITY	N	0	
MDSTIP	MEDICAL STIPEND 21	N	0	
MDSTIP26	MEDICAL STIPEND 26	N	0	
MENTOR	MENTOR	N	0	
MUSICAL	MUSICAL	N	0	
N/C LIFE	NON-CASH LIFE OV/50K	N	0	
NITEDIFF	NIGHT DIFFERENTIAL	N	0	
OT PAY	OVERTIME PAY	Y	1	
OT/DIFF	OVERTIME WITH DIFF	Y	1	
OVERPAY	OVERPAY	N	0	
PER DIEM	DAILY PAY	Y	7	
POSTSEA	POST SEASON	U	0	
PROCT	PROCTORING	Y	1	
PURCH	PURCHASING AGENT	N	0	
REG PAY	REGULAR HOURS	Y	1	
STDTREAS	STUDENT ACTIV. TREAS	N	0	
SUB CLER	SUBSTITUTE CLERICAL	Y	1	New Jan 2021
SUMMER	SUMMER SCHOOL	Y	1	
TESTPREP	RPSSS Test Prep	U	1	
VAC PAY	UNUSED VACATION DAYS	N	0	
XCLASS	EXTRA CLASS	Y	0.7	

2023 MPR Summary and Anomaly Report for Post Production Edited MPR version v3

Rocky Point UFSD
11-6001713

MPR Date Range
11/1/2022 To 10/31/2023

MPR Summary

Number of Employees	738
Number of Full Time Employees ¹	481
Number of Full Time Employees Offered	481
Percentage of Full Time Employees Offered	100
Number of Full Time Employees not Offered "Affordable Coverage" ²	33
ACA Employer Mandate §4980(a) Status (95% Minimum)	PASS
ACA Employer Mandate §4980(a) Estimated Penalty	\$0.00
ACA Employer Mandate §4980(b) Potential Penalty ³	\$142,560.00

¹ Full-Time Employee-- Employees who work an average 130 hours or more per calendar month

² Affordable Coverage – Employees whose required contribution towards single coverage of the lowest cost Minimum Essential health plan does not exceed 9.61% (2022) of their annual W2 Box 1 Earnings. Required contributions towards single coverage that exceeds 9.61% is considered "UNAFFORDABLE"

³ §4980H(b) Penalty only assessed to Full-time Employees who were not offered "Affordable" coverage, and are currently enrolled in a subsidized health plan on the State or Federal Health Exchange.

MPR Anomaly details begin on next page...

(See end of this report for specific Post-Production MPR changes that were made)

Rocky Point UFSD
11-6001713

Common Anomalies:

Terminated / retired employee where their termination date was not updated. Leave of absence / workers compensation

MPR ANOMALIES - General

Rocky Point UFSD
11-6001713

OTHER ANOMALIES - FT and Not Offered

Rocky Point UFSD
11-6001713

OTHER ANOMALIES - FT, Offered but NOT Affordable (FT/PT = "FT", Offered = "Y", Afford = "Not Afford")

Emp ID	Employee Name	Employee Group	Employee Type	Var. Hour	Hire Date	Term Date	FT/PT	Afford	Offered	MVPLAN	MVRATE	CONTRIB%	CONTRIB\$	AMOUNT
1636	WOOLEY, CYNTHIA	TEACHER AIDE	TEACHER AIDE	N	7/1/2002	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$24,680.05
2282	ALTIERI, URSOLA	TEACHER AIDE	TEACHER AIDE	N	9/1/2005	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$23,214.76
2289	KORF, CATHERINE	TEACHER AIDE	TEACHER AIDE	N	10/23/2019	1/1/2097	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$21,880.60
2311	BARBER, MARIANNE	TEACHER AIDE	TEACHER AIDE	N	11/29/2005	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$23,784.23
2506	LAFONTAINE, KRISTINE	TEACHER AIDE	TEACHER AIDE	N	10/24/2006	1/1/2098	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$24,867.17
2772	SCIULLA, MARY	TEACHER AIDE	TEACHER AIDE	N	9/1/2008	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$22,843.50
2950	MEEHAN, KAREN	TEACHER AIDE	TEACHER AIDE	N	11/24/2009	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$22,624.97
3091	IACONA, MARLO	TEACHER AIDE	TEACHER AIDE	N	3/30/2011	1/1/2098	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$23,732.88
3478	AMALFITANO, JACQUELINE	TEACHER AIDE	TEACHER AIDE	N	2/14/2014	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$21,136.87
3978	HENKIN, AMY	TEACHER AIDE	TEACHER AIDE	N	3/22/2017	1/1/2098	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$25,283.01
4103	CARBONE, KATELYN	FOOD SERVICE	LEAD FOOD SERVICE WORKER	N	11/27/2017	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$26,004.58
4111	ACCETTA, ANGELA	TEACHER AIDE	TEACHER AIDE	N	10/23/2019	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$22,350.82

Rocky Point UFSD
11-6001713

Emp ID	Employee Name		Employee Group			Employee Type					
	Var. Hour	Hire Date	Term Date	FT/PT	Afford	Offered	MVPLAN	MVRATE	CONTRIB%	CONTRIB\$	AMOUNT
4143	ROMANO, PAULETTE		TEACHER AIDE			TEACHER AIDE					
	N	3/21/2018	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$21,497.77
4183	MANISCALCHI, DANIELA		TEACHER AIDE			TEACHER AIDE					
	N	9/4/2018	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$21,817.67
4232	SICOLI, KELLY		TEACHER AIDE			TEACHER AIDE					
	N	2/6/2019	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$23,662.22
4322	CARROLL, DEIRDRE		TEACHER AIDE			TEACHER AIDE					
	N	2/5/2020	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$22,681.29
4331	RAU, JANIS		HALL MONITOR			SCHOOL HALL MONITOR					
	N	3/18/2020	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$20,614.03
4340	BOUTON, MARAN		TEACHER AIDE			TEACHER AIDE					
	N	9/1/2020	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$21,378.06
4347	SLAWSKY, RACHEL		TEACHER AIDE			TEACHER AIDE					
	N	9/1/2020	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$1,791.05	\$21,937.74
4378	ORTIZ, ELLEN		TEACHER AIDE			TEACHER AIDE					
	N	11/18/2020	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$25,541.10
4445	SELFRIDGE, HEATHER		TEACHER AIDE			TEACHER AIDE					
	N	8/31/2021	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$23,160.68
4450	GENNARO, STASIA		TEACHER AIDE			TEACHER AIDE					
	N	8/31/2021	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$21,617.82
4452	KLEIS, JEANINE		TEACHER AIDE			TEACHER AIDE					
	N	8/31/2021	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$19,999.84
4458	MENDRISKI, WENDY		TEACHER AIDE			TEACHER AIDE					
	N	9/22/2021	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$20,660.68
4461	ALBERT, JENNIFER		TEACHER AIDE			TEACHER AIDE					
	N	9/27/2021	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$21,447.08

Rocky Point UFSD
11-6001713

Emp ID	Employee Name		Employee Group			Employee Type					
	Var. Hour	Hire Date	Term Date	FT/PT	Afford	Offered	MVPLAN	MVRATE	CONTRIB%	CONTRIB\$	AMOUNT
4462	MORIARTY, AMANDA		TEACHER AIDE			TEACHER AIDE					
	N	10/18/2021	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$24,129.41
4498	ERICSON, TONI		TEACHER AIDE			TEACHER AIDE					
	N	2/9/2022	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$20,806.68
4518	MONTEFUSCO, BERNADETTE		TEACHER AIDE			TEACHER AIDE					
	N	4/25/2022	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$20,555.23
4589	WAGNER, AMY		HALL MONITOR			SCHOOL HALL MONITOR					
	N	10/3/2022	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$20,526.68
4591	GERVASI, ASHLI		TEACHER AIDE			TEACHER AIDE					
	N	10/3/2022	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$20,103.24
4596	NIEVES, ANASTASIA		TEACHER AIDE			TEACHER AIDE					
	N	10/19/2022	1/2/2024	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$19,834.24
4597	CONNOLLY, SUSAN		TEACHER AIDE			TEACHER AIDE					
	N	10/24/2022	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$20,115.00
4599	DWECK, NICOLE		TEACHER AIDE			TEACHER AIDE					
	N	10/24/2022	1/1/2099	FT	NOT AFFORD	Y	NYSHIP	\$1,326.70	0.15	\$2,388.06	\$19,099.24

Rocky Point UFSD
11-6001713

OTHER ANOMALIES - Employees with no Checks within 60 Days of Latest Payroll Date

Rocky Point UFSD
11-6001713

OTHER ANOMALIES - Employees with no FT/PT Status (Term Date prior to start of Tax Year) and Amount Earned is over: \$5,000.00

Rocky Point UFSD
11-6001713

New Variable Hour Employees Initial Measurement Period

Emp ID	Employee Name	Employee Type	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	AVRG
2965	CARBONE, KELLYANNE	SUB TEACHER AIDE/MONITOR	27	125	50	134	223	140	140	140	0	0	152	154	128
4202	MASTERTSON, SAMANTHA	SUB CUSTODIAL	0	0	0	24	53	56	0	0	0	0	0	0	13
4603	NELSON, RALPH	SUB CLERICAL	5	33	16	6	4	30	38	48	0	0	0	22	20
4604	CANFORA, MARIANNE	SUB TEACHER AIDE/MONITOR	7	0	0	0	0	0	0	0	0	0	0	0	0
4605	MCALLISTER, MACKENZIE L	SUB TEACHER/TEACHING ASST	0	63	84	119	133	84	112	91	0	0	0	0	68
4606	SANTORO, NINA	SUB TEACHER/TEACHING ASST	35	133	91	126	133	91	105	119	0	0	98	63	99
4607	NAPLES, JOSEPH	SUB TEACHER/TEACHING ASST	7	98	77	133	126	63	112	98	0	0	91	56	86
4608	POLLINA, AMANDA	SUB TEACHER AIDE/MONITOR	0	31	7	3	15	0	12	6	0	0	0	0	7
4609	REILLY, BEATY	FOOD SERVICE WORKER	0	88	53	70	91	53	70	63	0	0	58	35	58
4610	FORMAN, CHRISTOPHER	P/T GUARD	15	107	60	118	139	62	83	107	64	60	85	51	82
4612	FIELDS, AMANDA L	SUB TEACHER AIDE/MONITOR	0	4	6	0	0	0	0	0	0	0	0	0	1
4614	REYNOSO, MEAGAN D	SUB TEACHER/TEACHING ASST	0	0	42	98	0	0	0	0	0	0	0	0	14
4615	COPPOLONE, ERIC J	SUB TEACHER/TEACHING ASST	0	0	49	140	140	91	126	105	0	0	98	63	81
4616	MALINOWSKI, AIDAN	SUB TEACHER/TEACHING ASST	0	0	28	0	0	0	14	35	0	0	0	0	7
4617	BUCCINO, SKYLER P	SUB TEACHER/TEACHING ASST	0	0	56	112	147	84	105	84	0	0	0	0	58
4620	MOLINARO, ELIZABETH G	SUB TEACHER/TEACHING ASST	0	0	0	0	0	42	112	91	0	0	98	56	39
4622	DONOVAN, MELISSA	P/T SCHOOL LUNCH MONITOR	0	0	0	15	78	45	60	51	0	0	42	30	32
4623	EARLY, PHYLLIS	P/T SCHOOL LUNCH MONITOR	0	0	0	24	69	42	53	51	0	0	42	30	31
4624	BOOCCOCK, EMILY J	P/T FOOD SERVICE WORKER	0	0	0	32	32	0	0	0	0	0	0	0	6
4625	DEL VALLE, DANIEL A	SUBSTITUTE SECURITY GUARD	0	0	0	10	0	0	0	0	0	0	0	0	1
4626	PIPE, DONALD W	SUBSTITUTE SECURITY GUARD	0	0	0	10	3	3	0	0	0	0	0	0	1
4627	KOEHNE, JAMES J	SUBSTITUTE SECURITY GUARD	0	0	0	0	13	0	0	0	0	0	0	0	1
4628	FOLEY, JAMESV	SUB TEACHER/TEACHING ASST	0	0	0	0	14	0	21	0	0	0	0	0	3
4629	BARONE, TIMOTHY J	SUB TEACHER/TEACHING ASST	0	0	0	0	0	0	14	84	0	0	98	42	23
4630	ZUBILLER, DENISE E	P/T SCHOOL LUNCH MONITOR	0	0	0	0	30	45	60	51	0	0	0	0	18
4631	DRAGOS, CHRISTINE M	COACH	0	0	0	0	0	0	0	0	0	0	0	0	0
4632	KEATING, DANIELLE M	SUBSTITUTE TEACHER AIDE/MO	0	0	0	0	0	0	47	13	0	0	4	0	6

Rocky Point UFSD
11-6001713

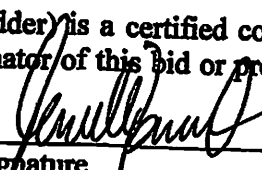
Emp ID	Employee Name	Employee Type	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	AVRG
4634	MARCANO, CATHERINEL	P/T SCHOOL LUNCH MONITOR	0	0	0	0	0	0	42	51	0	0	42	30	16
4635	SPINELLI, JENNIFER M	P/T SCHOOL LUNCH MONITOR	0	0	0	0	0	0	54	41	0	0	0	0	9
4636	ANDREWS, ALYSSA R	SUB TEACHER/TEACHING ASST	0	0	0	0	0	0	7	0	0	0	0	0	0
4640	WALSH, SAMANTHA G	SUB TEACHER/TEACHING ASST	0	0	0	0	0	0	0	7	0	0	0	0	0
4641	BUSCHBAUM, MARGARET E	FOOD SERVICE WORKER	0	0	0	0	0	0	4	0	0	0	0	0	0
4642	BARR, TERRY A	FOOD SERVICE WORKER	0	0	0	0	0	0	28	72	0	0	60	36	19
4651	FLEISCHER, JESSICA	COACH	0	0	0	0	0	0	0	0	0	0	0	0	0
4655	CASSWELL, CONOR P	SUB CUSTODIAN	0	0	0	0	0	0	0	0	40	93	0	0	0
4658	SARUBBI, WILLIAM	SUB CUSTODIAN	0	0	0	0	0	0	0	0	0	0	8	20	2
4659	JOHN, TIMOTHY	SUB CUSTODIAN	0	0	0	0	0	0	0	0	0	0	8	0	0
4661	GALLAGHER, MOLLY	SUB TEACHER/TEACHING ASST.	0	0	0	0	0	0	0	0	0	0	91	42	13
4666	TOUS, TAYLOR	SUB TEACHER/TEACHING ASST.	0	0	0	0	0	0	0	0	0	0	98	56	15
4670	MONKAN, ELIZABETH	GUARD	0	0	0	0	0	0	0	0	0	0	148	165	31
4672	SIMONE, JOHN	SECURITY	0	0	0	0	0	0	0	0	0	0	153	160	31
4673	HEPP, GREGORY	SECURITY	0	0	0	0	0	0	0	0	0	0	162	165	32
4675	RUSSO, ANTHONY	P/T GUARD	0	0	0	0	0	0	0	0	0	0	60	48	10
4676	TISKOWITZ, JONATHAN	GUARD	0	0	0	0	0	0	0	0	0	0	154	140	29
4677	KAUR, RAJWINDER	FOOD SERVICE WORKER	0	0	0	0	0	0	0	0	0	0	56	40	9
4678	FIORE, GERALDINE	P/T SCHOOL LUNCH MONITOR	0	0	0	0	0	0	0	0	0	0	21	0	2
4679	MULLER, NATALIE	P/T SCHOOL LUNCH MONITOR	0	0	0	0	0	0	0	0	0	0	42	30	7
4680	SHIMKIN, WARREN	FOOD SERVICE WORKER	0	0	0	0	0	0	0	0	0	0	56	20	7
4681	SOULIPOULOS, TONI	FOOD SERVICE WORKER	0	0	0	0	0	0	0	0	0	0	56	40	9
4682	SAKALIS, JESSICA	FOOD SERVICE WORKER	0	0	0	0	0	0	0	0	0	0	49	35	8
4683	SCOFIELD, LYNNE	P/T HALL MONITOR	0	0	0	0	0	0	0	0	0	0	70	50	12
4684	GUTMANN, SARAH	SUB TEACHER/TEACHING ASST.	0	0	0	0	0	0	0	0	0	0	98	56	15
4685	PEREZ-CACERES, JAZMIN	SUB TEACHER AIDE/MONITOR	0	0	0	0	0	0	0	0	0	0	84	24	10
4687	BURKE, COLLEEN	P/T HALL MONITOR	0	0	0	0	0	0	0	0	0	0	4	0	0
4688	FELDMANN, KATELYN	P/T HALL MONITOR	0	0	0	0	0	0	0	0	0	0	65	50	11
4691	MALTESE, TAYLOR	SUB TEACHER/TEACHING ASST.	0	0	0	0	0	0	0	0	0	0	21	56	7

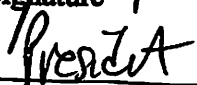
**ROCKY POINT UNION FREE SCHOOL DISTRICT
NON-COLLUSIVE BIDDING CERTIFICATION**

Chapter 751 of the Laws of 1965 amended Section 103-d of the General Municipal Law required that every bid or proposal submitted to a political sub-division of New York State must contain the following certification properly signed and executed:

The undersigned hereby certifies that:

- a. This bid or proposal has been independently arrived at without collusion with any other bidder with any competitor or potential competitor;
- b. This bid or proposal has not been knowingly disclosed and will not be knowingly disclosed, prior to the opening of bids or proposals for this project, to any other bidder, competitor or potential competitor;
- c. No attempt has been or will be made to induce any other person, partnership or corporation to submit or not to submit a bid or proposal;
- d. The person signing this bid or proposal certifies that he has fully informed himself regarding the accuracy of the statements contained in this certification, and under the penalties of perjury, affirms the truth thereof, such penalties being applicable to the bidder as well as to the person signing in its behalf.
- e. The attached hereto (if a corporate bidder) is a certified copy of resolution authorizing the execution of this certificate by the signator of this bid or proposal in behalf of the corporate bidder.



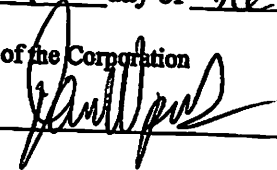
Signature


Title

RESOLUTION-for corporate bidders only

RESOLVED that Daniel C. Oparante be authorized to sign and submit the bid or proposal of this corporation for the following project, Affordable Care Act Consultant and to include in such bid or proposal the certificate as to non-collusion required by Section one hundred three-d of the General Municipal Law as the act and deed of such corporation, and for any inaccuracies or misstatements in such certificate this corporate bidder shall be liable under the penalties of perjury.

The foregoing is a true and correct copy of the resolution adopted by Seneca Risk Consulting Group, LLC Corporation at a meeting the 1 day of Dec 2023 and is still in full force and effect on this 1 day of Dec 2023

Seal of the Corporation


Secretary

CERTIFICATION OF COMPLIANCE WITH THE IRAN DIVESTMENT ACT

As a result of the Iran Divestment Act of 2012 (the "Act"), chapter 1 of the 2012 Laws of New York, a new provision has been added to Stat Finance Law (SFL) § 165-a and New York General Municipal Law § 103-g, both effective April 12, 2012. Under the Act, the Commissioner of the Office of General Services (OGS) will be developing a list of "persons" who are engaged in "investment activities in Iran" (both are defined terms in the law) (the "Prohibited Entities List"). Pursuant to SFL § 165-a(3)(b), the initial list is expected to be issued no later than 120 days after the Act's effective date at which time it will be posted on the OGS website.

By submitting a bid in response to this solicitation or by assuming the responsibility of a Contract awarded hereunder, each Bidder/Contractor, any person signing on behalf of any Bidder/Contractor and any assignee or subcontractor and, in the case of a joint bid, each party thereto, certifies, under penalty of perjury, that once the Prohibited Entities List is posted on the OGS website, that to the best of its knowledge and belief, that each Bidder/Contractor and any subcontractor or assignee is not identified on the Prohibited Entities List created pursuant to SFL §165-a(3)(b).

Additionally, Bidder/Contractor is advised that once the Prohibited Entities List is posted on the OGS Website, any Bidder/Contractor seeking to renew or extend a Contract or assume the responsibility of a Contract awarded in response to this solicitation must certify at the time the Contract is renewed, extended or assigned that it is not included on the Prohibited Entities List.

During the term of the Contract, should the School District receive information that a Bidder/Contractor is in violation of the above-referenced certification, the School District will offer the person or entity an opportunity to respond. If the person or entity fails to demonstrate that he/she/it has ceased engagement in the investment which is in violation of the Act within 90 days after the determination of such violation, then the School District shall take such action as may be appropriate including, but not limited to, imposing sanctions, seeking compliance, recovering damages or declaring the Bidder/Contractor in default. The School District reserves the right to reject any bid or request for assignment for a Bidder/Contractor that appears on the Prohibited Entities List prior to the award of a contract and to pursue a responsibility review with respect to any Bidder/Contractor that is awarded a contract and subsequently appears on the Prohibited Entities List.

I, Daniel C. Opinate, being duly sworn, deposes and says that he/she is the

President of the Seneca Risk Consulting Group LLC Corporation and that neither the Bidder/Contractor nor any proposed subcontractor is identified on the Prohibited Entities List.


SIGNED

SWORN to before me this

16th Day April day of 2014
20 State of New York County of Suffolk

Notary Public: William R. Salas

WILLIAM R. SALAS
NOTARY PUBLIC, STATE OF NEW YORK
Registration No. 01SA6378690
Qualified in Suffolk County
Commission Expires July 30, 2026

AFFIDAVIT OF COMPLIANCE

STATE OF


COUNTY OF

Daniel C. Opimante

being duly sworn, deposes and says:

- 1) That (s)he is an officer or representative of Seneca Risk Consulting Group LLC and that (s)he has the authority to sign this affidavit.
- 2) This affidavit is offered as an inducement to the Rocky Point Union Free School District to award to Seneca Risk Consulting Group LLC such purchase contracts for goods or services as directed by the Board of Education, in accordance with New York State law and with District policy.
- 3) That no Officer, Employee or Stockholder of the above referenced vendor is an Employee, in any position, Administrator or Board Member at the Rocky Point Union Free School District other than as disclosed below.
- 4) That no Officer, Employee or Stockholder of the above-referenced vendor is related to an employee in any position, administrator or Board Member, at the Rocky Point Union Free School District other than as disclosed below:

Vendor: List Officer, Employee or Stockholder's Name	Position with Vendor	Rocky Point UFSD Employee, Administrator or Board Member Name	Relationship between parties
N/A			


Signed

4/16/24
Date

Sworn to before me this 16th

Day of April, 2024
William R. Salas

State of New York
County of Suffolk

Notary Public

WILLIAM R. SALAS
 NOTARY PUBLIC, STATE OF NEW YORK
 Registration No. 01SA6378690
 Qualified in Suffolk County
 Commission Expires July 30, 2026

Seal

SEXUAL HARASSMENT CERTIFICATION

In accordance with State Finance Law §138-1, which generally prohibits the Rocky Point UFSD from entering into contracts pursuant to the bid/RFP process with persons who fail to submit a certification affirming compliance with New York State Labor Law §201-g, the proposer submits the following certification under the penalty of perjury: By submission of this proposal, each proposer and each person signing on behalf of any proposer, certifies, and in the case of a joint bid/proposal each party there to certifies as to its own organization, under penalty of perjury, that the proposer has implemented written policy addressing sexual harassment prevention in the workplace and provides annual sexual harassment training to all of its employees. Such policy shall, at a minimum, meet the requirements of Section 201-g of the NYS Labor Law.

Subscribed and sworn to
before me: this 16 April day of 2024
Daniel C. Opriante (Person, Firm or Corporation)
[Signature] (Authorized Signature)

William R. Salas 7/30/2026

State of New York
County of Suffolk

Notary Public or Commissioner of Deeds Commission Expires

WILLIAM R. SALAS
NOTARY PUBLIC, STATE OF NEW YORK
Registration No. 01SA6378690
Qualified in Suffolk County
Commission Expires July 30, 2026



Request for Proposal:
Affordable Care Act Consultant
RFP #R25-06

Prepared for:
Rocky Point Union Free School District



Eric Gilbert, Managing Partner

| (585) 734-7170

One South Clinton Ave., Ste. 1030 | Rochester, NY 14604

May 8th, 2024



Table of Contents

Table of Contents 2

Executive Summary..... 3

Qualifications..... 4

Cost Proposal..... 9

Appendix:

- Appendix A – Team Member Biographies
- Appendix B – ACA Client List
- Appendix C – Non-Collusive Bidding Certification
- Appendix D – Certification of Compliance with the Iran Divestment Act
- Appendix E – Affidavit of Compliance
- Appendix F – Sexual Harassment Certification



Executive Summary

Rocky Point Union Free School District
Attention: Debra Hoffman, Purchasing Agent
90 Rocky Point-Yaphank Road
Rocky Point, NY 11778

Thank you for the opportunity to bid on the Rocky Point Union Free School District Affordable Care Act Consultant RFP. U.S. Retirement & Benefits Partners (USRBP), which includes our benefits division U.S. Employee Benefits Services Group (USEBSG), was founded by an experienced group of retirement and benefits industry professionals who brought together top-tier independent benefit and retirement firms into a single national resource. We make available to our clients a broad array of services and tools to help them better manage their benefit programs and reduce administrative costs. We are currently a partner to the district serving as your 403b TPA (US OMNI).

Locally, U.S. Employee Benefits Services Group (USEBSG) has been providing insurance solutions since 2006, joining the USRBP organization in 2012. Today, USRBP is one of the largest national independent specialists in public sector benefits and retirement planning services. The unique combination of a local presence combined with the national strength of USRBP allows our team to deliver the highest level of services within the districts while leveraging the industry's best practices.

As the only strategic partner to NYSASBO for ACA services, we have been at the forefront of ACA Consulting since its inception and can help you navigate health care reform by providing comprehensive services to fully support all of the plan's ACA compliance requirements. Our ACA team will work with the district's benefits and payroll team to coordinate tracking and reporting and handle all 1094C and 1095C requirements for the district. USEBSG will help determine the district's compliance requirements, with consideration given to funding arrangement, plan designs, and collective bargaining agreements. Then, utilizing the Worxtime platform for tracking and reporting, we can calculate standard measurement, stability, and administrative periods for your plans. Using this system along with the plan's payroll data will allow us to identify employees' status and accurately produce and distribute both the 1094C and 1095C. Further, we produce regular ACA compliance updates, ensuring each districts' staff is always kept up to date on the most pertinent regulatory news.

We proudly serve over 200 New York State school districts with a 99% client retention rate, and we would be honored to serve Rocky Point Union Free School District for Affordable Care Act Consulting.

Best regards,

Eric Gilbert, Managing Partner
U.S. Employee Benefits Services Group

Qualifications

1. Provide the complete official name of the candidate firm as well as a brief description of its business activities and history for at least the past five (5) years.

U.S. Employee Benefits Services Group (USEBSG), a wholly owned subsidiary of U.S. Retirement & Benefits Partners (USRBP), is headquartered in downtown Rochester, NY, with local staff dedicated to serving our clients throughout Western New York. We are a full-service employee benefits and retirement brokerage and consulting firm specializing in providing comprehensive coverage solutions tailored to meet the diverse needs of our clients. Established in 2006, USEBSG has been serving the needs of New York State for over 15 years with a dedicated focus on New York State school districts and BOCES. We deliver a wide variety of services to our clients including, but not limited to, consulting services, plan design and implementation, vendor management, compliance support, claims administration, employee education and communication, renewal management, wellness program support, technology solutions, and dedicated client relationship management.

2. Provide clear and specific information regarding how long the firm has been in business and length of its experience in similar plan services for school districts.

US Employee Benefits Services Group (USEBSG) is a full-service firm exclusively focused on the world of employee benefits. We were founded in 2006 and have dedicated staff throughout New York State to bring our team and support to you.

In the ever-evolving landscape of employee benefits, particularly under the pressures of the Affordable Care Act, we recognize the paramount importance of having a seasoned team of industry experts by your side. At USEBSG, we pride ourselves on exceeding expectations and delivering unparalleled service. Our mission is clear: to provide you with a dedicated team of benefits professionals fully equipped to navigate the complexities of healthcare reform. With a focus on your specific needs and requirements, we are committed to delivering comprehensive support and guidance every step of the way.

USEBSG is uniquely qualified to provide you with support:

- Our company is comprised of tenured, skilled professionals, with a combined 100+ years' experience in employee benefits, to deliver information, analytics and strategy relative to the Affordable Care Act so you are prepared for the future
- Our Benefits Consulting department will plan and discuss benefit design strategy to meet the many requirements of ACA as well as provide complete project management in ensuring that obligations under the Act are met
- Our in-house Compliance department will provide a schedule of notices, changes and key

- dates along with facilitation of any mailings, so you stay compliant
- Our Underwriting department is extensively trained on the ACA legislation and will help determine full-time equivalents, assess possible penalties, set measurement and stability periods and assist with contribution analysis
 - We are supported by the law firm Marathas, Barrow, Weatherhead, & Lent LLP
 - As members of Nassau, Suffolk and NYS ASBO groups, we truly understand the mounting pressures of budget restrictions, labor agreements and the need to embrace the ever-changing laws that will impact New York State school districts
 - As part of U.S. Retirement Partners, we have further access to benefits firms and expertise that is dedicated to school districts across the country

3. Identify specifically the firm's professional staff members who will be assigned to this contract if it is awarded, the experience each possesses, and the location of the office from which the individuals will work. Provide a detailed biography and/or resume outlining the experience and credentials of all such staff members.

USEBSG Team:

Eric Gilbert, Managing Partner, 20 years of experience, Rochester, NY

Tony Chess, Account Manager, 10 years of experience, Rochester, NY

Katy Dermady, Account Manager, 10 years of experience, Rochester, NY

Sharon Pappas, Director of Compliance and Technology, 25 years of experience, Rochester, NY

Ed Hilton, Director of Operations and Finance, 20 years of experience, Rochester, NY

Team member biographies included within the Appendix for reference.

4. Provide a list of companies, including school districts, that your company provided similar service; including the dates of service and the name of the contact person at each identified client.

At USEBSG, we proudly serve the needs of more than 100 clients, offering comprehensive ACA compliance consulting and reporting services. Our commitment to excellence in this area is ongoing, requiring continuous consultation on the intricacies of the Affordable Care Act and its associated reporting requirements.

Working hand in hand with our clients, we undertake the collaborative task of collecting and compiling the requisite data, providing timely alerts and notifications to ensure all necessary information is obtained. From there, we meticulously create and deliver monthly reports, facilitating the seamless distribution of 1094/1095C forms and executing the applicable IRS filing process. Our services encompass every aspect of IRS filing, from transmittal to the management of any necessary corrections.

Here are a couple of notable school districts among the many we proudly support with similar services:

Valley Stream Union Free School District #24
Saundra Hernandez

516-434-2831
Client since 2018

Central Islip Union Free School District
Claude Corbett

631-348-5000 x1024
Client since 2016

Valley Stream Central High School District
Patricia Wilson

516-872-5618
Client since 2016

Within the Appendix you will find a complete list of companies we provide ACA services for.

5. Provide the name and title of the person or persons submitting this proposal, the firm's main office address, and the primary and secondary points of contact, their email addresses, and telephone and fax numbers, including area codes.

Proposal Submitted by: Eric Gilbert, Managing Partner

Company: U.S. Employee Benefits Services Group

Office Address: One South Clinton Avenue, Suite 1030, Rochester, NY, 14604

Telephone: 585-734-7170

Email:

Primary Contact: Tony Chess, Account Manager

Telephone: (585) 270-5761 x107

Email:

Secondary Contact: Katy Dermady, Account Manager

Telephone: (585) 270-5761 x111

Email:

Secondary Contact: Sharon Pappas, Director of Compliance

Telephone: (585) 270-5761 x113

Email:

6. Describe in detail the experience your firm and its staff have in working with public sector clients. Describe how needs specific to the public sector were met. Highlight any experience specific to school districts.

USEBSG has extensive experience working with public sector clients, including school districts. We currently serve over 55% of all school districts nationally. Our consultants and staff have a deep understanding of the unique needs and challenges faced by public sector entities, and we have successfully tailored our services to meet those needs.

We work closely with school districts across the country to deliver comprehensive insurance and compliance solutions that address their specific requirements. We understand the importance of compliance with regulations and budget constraints in the public sector, and our team is adept at navigating these complexities to find cost-effective and reliable insurance solutions for school districts. We prioritize proactive communication and collaboration with school district administrators to ensure that their needs are met effectively and efficiently.

In addition, our staff has undergone specialized training focused on public sector employers and their unique needs, further enhancing our expertise in this area. We are committed to providing exceptional service and support to school districts, helping them protect their assets and achieve their goals with confidence.

7. Describe the reports your company generates and how often they will be provided to the District.

There are four reports that we would generate and distribute to the District on a monthly basis.

1. **Admin Report** – Displays the employees who are currently in their Admin period.
2. **Employees Trending Eligible** – Displays the employees who are currently trending as eligible as of the time the report is run.
3. **Employees Confirmed Eligible** – Displays employees who are confirmed eligible.
4. **Monthly Hours Report** – Displays the hours for each employee that have been loaded monthly.

8. Provide any additional information that you feel would distinguish your firm in its service to the District.

USEBSG will develop a regular meeting schedule with the appropriate parties to provide support for all aspects of Health Care Reform. As this is a complex change in health care requirements, we

would identify all areas of needed support, consistent with the required Scope of Services and build a project timeline that commits our firm to delivering on related areas in the below continuum. USEBSG has an internal staff of trained professionals including a Compliance Specialist, Health Underwriter, Regional Benefits Consultant and Practice Leader who support these efforts and use multiple sources to stay abreast of the latest legislation and requirements.

USEBSG will provide reporting and analytics related to the Affordable Care Act including Pay/Play calculations, affordable cost reviews, and assists with establishing stability/measurement periods. We will also deliver strategic analysis of benefit designs, carriers, and employer contributions. These reports are provided on a semi-annual basis, or as requested.

The process that USEBSG has developed in order to ensure that our clients are in compliance with the requirements of the ACA begins by meeting with your team and establishing a strategic project timeline, regular meeting schedule and a schedule of ongoing support based on dates specified in the ACA. Following this initial meeting our team will provide a complete benefit analysis to benchmark the current medical insurance program offered against the requirements of the ACA and provide recommendations in order to bring the medical insurance program into compliance if needed. Included in this analysis will be a comprehensive Pay-or-Play study, identifying plan affordability, whether minimum value is being offered, and any potential penalties, and proposing alternatives funding scenarios to minimize exposure. We will work with districts and their payroll/technology systems implemented to develop a historic database of employees, which will serve as the basis for establishing and maintaining measurement periods and aid in identifying employees in danger of triggering penalties. The ongoing support USEBSG will continue to provide includes but is not limited to:

- Training on notifications and other pertinent information stemming from the ACA
- Assistance in filing reports required under section 6056, including but not limited to IRS Form 1094-C and 1095-C
- Providing Department of Labor notices and cover letters
- Guidance on Summary of Benefits Coverage distribution
- The annual statement given each year by March 2 to be included in employees' individual returns
- Develop a database of employee information in order to determine the most appropriate measurement/stability periods

Cost Proposal

Please provide a lump sum fee for the "Basic Level" services as set forth in the specifications, including (1) Assistance in ensuring compliance of the District's health insurance offerings with the PPACA; and (2) consulting services in connection with determining those employees for whom health insurance is mandated pursuant to the requirements of the PPACA; and (3) filing returns. Also provide a separate cost to print and mail annual 1095-C tax forms on behalf of the District.

The cost must include all items identified in this RFP/Contract, including, but not necessarily limited to items such as:

1. Set up fees, if any;
2. Annual maintenance fees, and payment terms.
3. No additional billing will be allowed for travel expenses, parking, participant materials, or other incidentals.

Please provide your hourly rate in the event services in addition to those set forth above as "base level" services are requested by the School District to be provided.

One-Time Set-Up Fee - \$3,000.00

Annual Maintenance Fees - \$1.00 Per Employee Per Month

- Applied to each month in the calendar year that applies to the 1094C/1095C reporting

Print and Mail - \$2.00 Per Fulfillment

Hourly Rate for Additional Services Requested - \$150 Per Hour

Appendixes

Appendix A | Team Member Biographies

Eric Gilbert
Managing Partner

As the Managing Partner, Eric brings a wealth of experience spanning decades in the healthcare industry, complemented by a robust background in solid management. His seasoned expertise serves as a cornerstone, providing our firm with invaluable strategic and analytical direction. Eric became an integral part of USEBSG in 2012, initially assuming the position of Managing Director, and in recognition of his exceptional leadership, he ascended to the role of Managing Partner in 2022.

Before his tenure with USEBSG, Eric held pivotal leadership and account management roles at Excellus BCBS, where he adeptly oversaw predominantly consortia and large self-funded clients. His hands-on experience in managing diverse portfolios equips him with a nuanced understanding of the intricacies within the industry.

Eric's proficiency spans various facets of the business, including client counseling, financial modeling, and the seamless integration of service offerings. His strategic acumen has played a pivotal role in new business development, showcasing his ability to identify and capitalize on emerging opportunities.

Eric's journey from Managing Director to Managing Partner is a testament to his exceptional leadership, industry knowledge, and a keen understanding of the evolving healthcare landscape. His multifaceted expertise continues to guide and elevate USEBSG towards sustained success and innovation.

Tony Chess
Account Manager

Tony is an accomplished Compliance Account Manager at US Employee Benefits Services Group (USEBSG), specializing in providing comprehensive compliance solutions to a diverse range of clients. With a keen eye for detail and a passion for regulatory adherence, Tony plays a pivotal role in ensuring that clients navigate the complex landscape of employee benefits compliance with confidence and ease.

Bringing extensive experience in the field of regulatory compliance, Tony is adept at interpreting and implementing a wide array of regulations, including but not limited to the Affordable Care Act (ACA), HIPAA, ERISA, and COBRA. His deep understanding of these regulations allows him to provide tailored guidance to clients, ensuring that they always remain fully compliant.

Tony's commitment to excellence extends beyond mere compliance. He actively seeks out opportunities to optimize processes and enhance efficiency, helping clients streamline their compliance efforts while minimizing administrative burden. His proactive approach and dedication to client success have earned him the trust and respect of colleagues and clients alike.

Katy Dermady
Account Manager

Katy brings a wealth of expertise to her role as an Account Manager, specializing in both public sector and school district market segments. With a robust background in insurance and major market carriers, she offers a deep understanding of the industry landscape and is adept at navigating complex benefit solutions.

Drawing on her extensive experience, Katy excels in recommending, presenting, and servicing optimal benefit options for her clients. Her meticulous marketing analysis and keen expertise enable her to tailor solutions that meet the unique needs of each account group.

Katy's commitment to professional development is evident through her attainment of the GBDS designation, which underscores her ability to effectively engage school districts on a comprehensive range of group benefits products. She places particular emphasis on the importance of disability income insurance, recognizing its pivotal role in ensuring financial security for employees and employers alike.

A graduate of the University of Buffalo with a Bachelor of Science degree in Business Administration and a concentration in Human Resource Management, Katy is well-equipped to provide strategic guidance and support to her clients, driving positive outcomes and fostering long-term partnerships.

Sharon Pappas
Director of Compliance and Technology

Sharon assumes a multifaceted role at USEBSG, where she adeptly navigates the intricate landscape of Health Care Reform, compliance, and technology needs across diverse markets. Tasked with overseeing these critical facets, she draws upon her extensive experience, exceeding 30 years in HR and Compliance.

Supported by our National Compliance Team, Sharon serves as a vital resource for clients, guiding them through the intricacies of regulatory requirements mandated by law. Her role extends beyond mere adherence, as she actively contributes to the evolution of compliance strategies, ensuring alignment with ever-changing regulations.

Sharon's wealth of experience is not confined to internal operations; she is a recognized expert in Health Care Reform compliance efforts. Her insightful presentations across the state and annual Compliance Reviews for each client exemplify her commitment to sharing knowledge and promoting best practices.

In her capacity, Sharon oversees a spectrum of compliance-related activities, including managing changes due to Health Care Reform mandates, disseminating Department of Labor notices to employees, handling CMS notices, and ensuring the meticulous creation and upkeep of mandated Health and Welfare SPD and Wrap Plan Documents.

Working closely with the local Compliance team, Sharon ensures that every client receives unwavering support, equipped with the necessary tools and guidance to maintain compliance with both federal and state requirements.

Ed Hilton
Director of Operations and Finance

Ed brings a distinctive, data-driven approach to health plan management, particularly for our large clients. With nearly two decades immersed in Rating, Underwriting, and Analytics, his actuarial expertise positions him as a valuable resource in identifying trends within clients' data. Ed collaborates with clients to craft customized solutions tailored to their unique needs.

Specializing in alternative funding arrangements, Ed possesses a unique skill set in elucidating the intricacies of health plan dynamics through targeted data reporting. His proficiency extends beyond the technicalities, as he delivers strategic analysis of benefit designs, carriers, and renewals, providing clients with actionable insights for informed decision-making.

Ed's experience is not limited to the analytical realm; he brings a comprehensive understanding of population health management and wellness. Collaborating closely with the plan, he plays a pivotal role in establishing and maintaining wellness programming. Ed's perspective, rooted in a deep understanding of claims trends, enables him to co-create programs with clients that not only meet employees' needs but also effect positive behavioral change.

Recognized for his commitment to wellness, Ed holds certification as WELCOA Faculty through the Wellness Council of America, further showcasing his dedication to fostering healthy, productive workplace environments.

Appendix B | ACA Client List

Company Name	Contact	Client Since
Afton Central School District	Kristyn DeGroat	10/31/2023
Alexander Central School District	Tim Batzel	12/18/2015
Berlin Central School District	Sheri Kellar-Willis	03/02/2016
Bloomfield CSD	Gail Harrington	03/29/2018
Olean City School District	Tiana Livingston	12/10/2015
Randolph Academy Union Free School District	Regina Sheldon	12/11/2015
RANDOLPH CENTRAL SCHOOL DISTRICT	Danielle Hinman	12/11/2015
SALAMANCA City Central School District	Josie Hubbard	12/20/2015
Scio CSD	John Cucchiaro	12/10/2015
Wellsville Central School District	Katie Faulkner	03/18/2016
West Valley CSD	Ann OBrien	12/11/2015
Whitesville Central School	Doug Moot	12/10/2015
CATTARAUGUS/ALLEGANY BOCES	Amy Windus	12/09/2015
Ellicottville CSD	Aimee Kilby	12/09/2015
Fillmore CSD	Joseph Butler	12/10/2015
Franklinville Central School District	Donna Howard	12/23/2015
FRIENDSHIP CSD	Constance Spring	12/18/2015
Genesee Valley CSD	Erin Ostrander	12/17/2015
HINSDALE CSD	Jennifer Jaquith	12/20/2015
Portville CSD	Pamela Anderson	12/11/2015
Allegany-Limestone CSD	Daniele Vecchio	12/10/2015
ANDOVER CSD	Jamie Coyle	12/20/2015
BELFAST CSD	Keegan Harrington	12/18/2015
Bolivar Richburg CSD	Jessica Mitchell	12/14/2015
Cattaraugus-Little Valley CSD	Heather Brown	02/29/2016
CUBA RUSHFORD CSD	Denise Carapellatti	12/15/2015
Alfred-Almond CSD	Kathryn Kruger	01/04/2022
Cassadaga Valley Central School District	Jamie Rogers	12/12/2019
Constellation Brands US Operations Inc	Jessica Loiacono	04/18/2024
Constellation Brands, Inc.	Jessica Loiacono	04/18/2024
Constellation Leasing LLC	Jessica Loiacono	04/18/2024
Constellation Marketing Service Inc	Jessica Loiacono	04/18/2024
Crown Imports LLC	Jessica Loiacono	04/18/2024
High West Distillery LLC	Jessica Loiacono	04/18/2024
High West Saloon	Jessica Loiacono	04/18/2024
TPWC Inc	Jessica Loiacono	04/18/2024
CENTRAL ISLIP UFSD	Claude Corbett	12/20/2015
Cheltenham School District	Joshua Sweigard	02/18/2024
Chenango County	RC Woodford	12/09/2015
Cleveland Hill UFSD	Alexandria Bess	07/21/2016
Comsewogue School District	Meghan Quarltre	10/20/2015
DAVIE KAPLAN WEALTH CARE ADVISORS, LLC	Todd Eaton	11/02/2015
DAVIE KAPLAN, CPA P.C.	Todd Eaton	11/02/2015

Dover Union Free School District	Nicole Improta	12/21/2015
East Aurora UFSD	Lorianne Gervasi	07/17/2020
East Williston UFSD	Diane Castonguay	12/20/2015
Erie 1 BOCES	James Fregelette	10/25/2017
Gowanda Central School	Aimee Gernatt	02/09/2021
Grand Island Central School District	Suzanne Pflieger	08/19/2016
Heritage Christian Child Care LLC	Robin Coleman	12/14/2015
Heritage Christian Services	Robin Coleman	11/18/2015
Island Park UFSD	Barbara Ryan	11/02/2016
Jenkintown School District	Karen Ovington	08/16/2023
Kendall CSD	Christopher Nasella	04/13/2023
Kenmore - Town of Tonawanda UFSD	Kathy Kightlinger	09/18/2020
Kiryas Joel Union Free School District	Sara Goldberger	12/07/2015
Lancaster Central School District	Maureen Wing	09/23/2019
Lansingburgh Central School District	Jane Luskin	10/28/2021
Le Roy Central School District	Brian Foeller	11/02/2015
Maryvale UFSD - TO	Melinda Evans	06/13/2016
Niagara Wheatfield CSD	Maureen Mack	12/10/2015
North Lamar ISD	Kealey Edwards	07/05/2016
North Tonawanda CSD	Katie Smith	09/24/2019
ONC BOCES	Lynn Chase	12/17/2015
Charlotte Valley Central School District	Troy Rider	11/13/2015
Cherry Valley-Springfield CSD	Ginger Thayer	12/11/2015
Gilboa-Conesville CSD	Marianne Romito	10/21/2015
JEFFERSON CENTRAL SCHOOL	Tarkan Ceng	12/09/2015
LAURENS CENTRAL SCHOOL	Amy Schlee	12/09/2015
Margaretville CSD	Beth Teuber	11/12/2015
MILFORD CENTRAL SCHOOL	Marissa Christensen	12/17/2015
MORRIS CSD	Jamie Maistros	12/11/2015
Roxbury Central School	Wendy Sprague	11/30/2015
SCHENEVUS CENTRAL SCHOOL DISTRICT	Stephanie Lincoln	11/16/2015
South Kortright Central School	Thomas Newman	12/17/2015
Stamford Central School	Donna Bright	12/15/2015
Windham Ashland Jewett CSD	Michelle Mattice	09/10/2015
Worcester Central School	Gary Pochkar	12/17/2015
Orange Ulster BOCES	Erin McEvoy	11/16/2015
Pembroke Central School District	Sherry Reeb	10/19/2015
Pocantico Hills Central School District	Michael Vanyo	11/20/2017
Batavia Bus Service, Inc.	Caitlin Farley	12/23/2015
County Area Transit System, Inc.	Caitlin Farley	12/23/2015
Genesee Transportation Council	Caitlin Farley	01/14/2016
Lift Line, Inc.	Caitlin Farley	12/23/2015
Livingston Area Transportation Service, Inc.	Caitlin Farley	12/23/2015
Orleans Transit Service, Inc.	Caitlin Farley	01/07/2016

Regional Transit Service, Inc.	Caitlin Farley	11/03/2015
Rochester-Genesee Regional Transportation Authority	Caitlin Farley	01/08/2016
Seneca Transit Service, Inc.	Caitlin Farley	01/08/2016
Wayne Area Transportation Service, Inc.	Caitlin Farley	01/08/2016
Wyoming Transit Service, Inc.	Caitlin Farley	01/08/2016
Sherman ISD	Mandi Lewis	07/05/2016
Town of Crown Point CSD	Victoria Russell	12/18/2015
University City School District	Jennifer Mullen	09/28/2023
UFSD OF THE TARRYTOWNS	Mathew Kurien	04/06/2021
US Retirement Partners	Cheryl Bennett	03/24/2021
Valley Stream Central High School District	Pat Wilson	12/09/2015
VALLEY STREAM UFSD #13	Gerard Antoine	12/09/2015
Valley Stream UFSD #24	Jack Mitchell	08/01/2018
Wallingford-Swarthmore School District	Eileen Seichepine	07/13/2023
Weston Public Schools	Marisa Forchione	11/03/2015
Willsboro CSD	Allison Sucharzewski	11/04/2015

Appendix C | Non-Collusive Bidding Certification

**ROCKY POINT UNION FREE SCHOOL DISTRICT
NON-COLLUSIVE BIDDING CERTIFICATION**

Chapter 751 of the Laws of 1965 amended Section 103-d of the General Municipal Law required that every bid or proposal submitted to a political sub-division of New York State must contain the following certification properly signed and executed:

The undersigned hereby certifies that:

- a. This bid or proposal has been independently arrived at without collusion with any other bidder with any competitor or potential competitor;
- b. This bid or proposal has not been knowingly disclosed and will not be knowingly disclosed, prior to the opening of bids or proposals for this project, to any other bidder, competitor or potential competitor;
- c. No attempt has been or will be made to induce any other person, partnership or corporation to submit or not to submit a bid or proposal;
- d. The person signing this bid or proposal certifies that he has fully informed himself regarding the accuracy of the statements contained in this certification, and under the penalties of perjury, affirms the truth thereof, such penalties being applicable to the bidder as well as to the person signing in its behalf.
- e. The attached hereto (if a corporate bidder) is a certified copy of resolution authorizing the execution of this certificate by the signator of this bid or proposal in behalf of the corporate bidder.

Signature

Title

RESOLUTION-for corporate bidders only

RESOLVED that Eric Calvert be authorized to sign and submit the bid or proposal of this corporation for the following project, ACA Consulting

and to include in such bid or proposal the certificate as to non-collusion required by Section one hundred three-d of the General Municipal Law as the act and deed of such corporation, and for any inaccuracies or misstatements in such certificate this corporate bidder shall be liable under the penalties of perjury.

The foregoing is a true and correct copy of the resolution adopted by U.S. Employee Benefits Corporation at a meeting the 17th day of April 2024 and is still in full force and effect on this 17th day of April 2024

Seal of the Corporation

Secretary

Appendix D | Certificate of Compliance: IDA

CERTIFICATION OF COMPLIANCE WITH THE IRAN DIVESTMENT ACT

As a result of the Iran Divestment Act of 2012 (the "Act"), chapter 1 of the 2012 Laws of New York, a new provision has been added to Stat Finance Law (SFL) § 165-a and New York General Municipal Law § 103-g, both effective April 12, 2012. Under the Act, the Commissioner of the Office of General Services (OGS) will be developing a list of "persons" who are engaged in "investment activities in Iran" (both are defined terms in the law) (the "Prohibited Entities List"). Pursuant to SFL § 165-a(3)(b), the initial list is expected to be issued no later than 120 days after the Act's effective date at which time it will be posted on the OGS website.

By submitting a bid in response to this solicitation or by assuming the responsibility of a Contract awarded hereunder, each Bidder/Contractor, any person signing on behalf of any Bidder/Contractor and any assignee or subcontractor and, in the case of a joint bid, each party thereto, certifies, under penalty of perjury, that once the Prohibited Entities List is posted on the OGS website, that to the best of its knowledge and belief, that each Bidder/Contractor and any subcontractor or assignee is not identified on the Prohibited Entities List created pursuant to SFL §165-a(3)(b).

Additionally, Bidder/Contractor is advised that once the Prohibited Entities List is posted on the OGS Website, any Bidder/Contractor seeking to renew or extend a Contract or assume the responsibility of a Contract awarded in response to this solicitation must certify at the time the Contract is renewed, extended or assigned that it is not included on the Prohibited Entities List.

During the term of the Contract, should the School District receive information that a Bidder/Contractor is in violation of the above-referenced certification, the School District will offer the person or entity an opportunity to respond. If the person or entity fails to demonstrate that he/she/it has ceased engagement in the investment which is in violation of the Act within 90 days after the determination of such violation, then the School District shall take such action as may be appropriate including, but not limited to, imposing sanctions, seeking compliance, recovering damages or declaring the Bidder/Contractor in default. The School District reserves the right to reject any bid or request for assignment for a Bidder/Contractor that appears on the Prohibited Entities List prior to the award of a contract and to pursue a responsibility review with respect to any Bidder/Contractor that is awarded a contract and subsequently appears on the Prohibited Entities List.

I, Eric C. Bent, being duly sworn, deposes and says that he/she is the Partner of the U.S. Employee Benefits Corporation and that neither the Bidder/Contractor nor any proposed subcontractor is identified on the Prohibited Entities List.

SIGNED

SWORN to before me this

17th day of April

2024

Notary Public: Kathryn Manfre



Appendix E | Affidavit of Compliance

AFFIDAVIT OF COMPLIANCE

STATE OF

COUNTY OF

Eric C. Bent, being duly sworn, deposes and says:

- 1) That (s)he is an officer or representative of U.S. Employee Benefits Services Corp and that (s)he has the authority to sign this affidavit.
- 2) This affidavit is offered as an inducement to the Rocky Point Union Free School District to award to U.S. Employee Benefits Services Corp such purchase contracts for goods or services as directed by the Board of Education, in accordance with New York State law and with District policy.
- 3) That no Officer, Employee or Stockholder of the above referenced vendor is an Employee, in any position, Administrator or Board Member at the Rocky Point Union Free School District other than as disclosed below.
- 4) That no Officer, Employee or Stockholder of the above-referenced vendor is related to an employee in any position, administrator or Board Member, at the Rocky Point Union Free School District other than as disclosed below:

Vendor: List Officer, Employee or Stockholder's Name	Position with Vendor	Rocky Point UFSD Employee, Administrator or Board Member Name	Relationship between parties

[Signature]

Signed

4-17-24

Date

Sworn to before me this 17th

Day of April, 2024

Kathryn Manfre

Notary Public



Seal

Appendix F | Sexual Harassment Certification

SEXUAL HARASSMENT CERTIFICATION

In accordance with State Finance Law §138-1, which generally prohibits the Rocky Point UFSD from entering into contracts pursuant to the bid/RFP process with persons who fail to submit a certification affirming compliance with New York State Labor Law §201-g, the proposer submits the following certification under the penalty of perjury: By submission of this proposal, each proposer and each person signing on behalf of any proposer, certifies, and in the case of a joint bid/proposal each party there to certifies as to its own organization, under penalty of perjury, that the proposer has implemented written policy addressing sexual harassment prevention in the workplace and provides annual sexual harassment training to all of its employees. Such policy shall, at a minimum, meet the requirements of Section 201-g of the NYS Labor Law.

Subscribed and sworn to
before me: this 4-17 day of 2024

Eric Calbert

(Person, Firm or Corporation)



(Authorized Signature)

Kathryn Manfre

MARCH 27th 2028

Notary Public or Commissioner of Deeds Commission Expires



RFP Assessment Worksheet

School Years

2024-25 through 2028-29

Page 1 of 1

Project or Service Description

Workers Comp TPA - 5 year proposal requested.

Vendor Scoring (use additional worksheets if necessary)

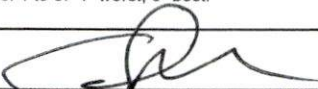
Selection Criteria	Weight*	Wright Risk Management		PMA					
		Raw Score**	Weighted Score***	Raw Score	Weighted Score	Raw Score	Weighted Score	Raw Score	Weighted Score
Cost \$	40%	4.81	1.92	5.00	2.00				
Comprehension of Scope of Work	20%	5.00	1.00	5.00	1.00				
TPA Experience	20%	5.00	1.00	5.00	1.00				
Vendor compliance with RFP specs	20%	5.00	1.00	5.00	1.00				
Other (describe)									
Overall Ranking	100%	4.92	5.00	-	-	-	-	-	-

Vendor Selected: PMA Mgmt. Corp.
 Recommended By: C Van Cott ✓
 Title: Asst. Superintendent for Business
 Date: 5/6/2024 ✓

RFP Assessment Comments, if needed:

PMA has successfully provided TPA services for the past five years to the RP School District. PMA services many clients in & out of NYS. Wright Risk provides TPA services to several hundred NYS districts. Both TPAs are experienced and qualified to perform this service. Each TPA performs medical bill review and advertise high percentage savings for their clients. C. Van Cott was informed from a colleague, Smithtown CSD & Half Hollow Hills CSD recently switched from Wright Risk to PMA; CVC contacted their respective Business Officials - both districts stated poor customer service and less than ideal outcomes as the reason for their change in third-party administration. Recommendation is to stay with PMA due to lower annual retainer and feedback from colleagues.

Notes:
 * Percentage weights must add up to 100%. Price must be weighted the heaviest.
 ** Evaluated on a scale of 1 to 5: 1=worst, 5=best.
 *** Weight x Raw Score


 Christopher A. Van Cott

April 18, 2024

Debra Hoffman, Purchasing Agent
Rocky Point Union Free School District
90 Rocky Point -Yaphank Road
Rocky Point, New York 11778

Dear Ms. Hoffman,

On behalf of PMA Management Corp., thank you for the opportunity to submit a proposal to continue serving Rocky Point Union Free School District and provide Workers' Compensation Third-Party Administrative (TPA) & Risk Services. It has been a pleasure working with Rocky Point Union Free School District, and I believe we have made great progress together! We understand that the business and risk management priorities of Rocky Point Union Free School District include creating a safer, healthier workplace, safeguarding its assets, and reducing its total cost of risk. Our approach to risk management aligns our priorities with yours, helping to maximize the results we can achieve together.

This proposal outlines why PMA Management Corp is the best choice to continue serving as your partner in managing risk. In addition to **Rocky Point Union Free School District**, we provide risk services to **140+ distinct NY K-12 clients**. PMAMC has 50+ years of experience serving public entities. Key highlights of our workers' compensation TPA & Risk Services proposal include:

- **Unique holistic approach**—which provides pre-loss, loss-reduction, and post-loss strategies to reduce your total cost of risk
- **An innovative company with a stable leadership team**, and **service-driven culture**—all focused on protecting workers while preventing claims and reducing their costs
 - *We have over a 100+ year history in managing workers' compensation exposures. We are one of the top 10 workers' compensation TPA's in the country and the largest in New York State.*
- **Industry expertise** earned through **decades of experience and research collaboration** with various national self-insurance and public risk organizations
 - *Support and participation in state, regional and national associations (NYSASBO, PRIMA, URMIA, RIMS, NYSASIC, etc.)*
- A professional, local **service team** leveraging PMA's 100+ years of specialized risk management expertise and infrastructure
- **Low target caseloads** for claims professionals to facilitate greater focus on each claim
- An ever-evolving and fully integrated **managed care program** that uses a strategically sequenced, data-driven approach to assess lost-time claims and cost-effectively get injured workers the right care at the right time
- **24/7 Customer Service Center** that supports you, your injured workers, and their medical providers, enabling our claims professionals to focus on cost-effective claims resolutions.

At PMA Management Corp., we have created a 100-year success story one relationship at a time; we consider Syracuse City School District to be an important chapter in that story. We are passionate about doing what we say and delivering exceptional value to our clients. We look forward to the opportunity to continue as your partner in managing risk, improving your program results, and exceeding your service expectations.

Sincerely,



Brian Guckert
Account Specialist
PMA Companies | Old Republic Insurance Group
5789 Widewaters Parkway Dewitt, NY 13214
O: 315-445-6401 | C: 315-640-0550
Brian |



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Table of Contents

PMAMC Business Activities & History	4
School District Experience	5
Additional Information	6
PMAMC's Holistic Approach to Risk Management	6
Claims Handling	8
Comprehensive & Integrated Managed Care	16
Risk Control Services	17
Scope of Services	19
Contracts	20
Attachments	21
DETAILS OF MANAGEMENT AND KEY PERSONNEL	22
REFERENCES:	23
CONTACT DETAILS.....	24
VENDOR INFORMATION SHEET	25
CERTIFICATION – IRAN DIVESTMENT ACT OF 2012.....	26
STATEMENT OF NON-COLLUSION.....	27
RELATED PARTY AFFIDAVIT	28
HOLD HARMLESS AGREEMENT	29
DECLARATION PAGE.....	30
PMAMC BOARD OF DIRECTORS	31
CERTIFICATES OF INSURANCE / NY LICENSE	33
SAMPLE AGREEMENT	36



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PMAMC Business Activities & History



Years TPA & Risk Services Expertise



National Award-Winning Clients



Average Customer Retention



Average PMA Client Tenure



Old Republic International (ORI) is a Fortune 500 firm, the parent company of PMA Companies, and one of the nation's 50 largest shareholder-owned insurance organizations with consolidated assets of \$26.5 billion (as of December 31, 2023).

PMA Management Corp. (PMAMC) is a leading provider of workers' compensation, property and casualty third-party administration and risk services for self-insureds, unbundled large deductible and self insured retention programs, groups, trusts, captives, pools and programs. PMAMC's client retention averages 97% and client satisfaction averages 95% per independent surveys. PMAMC aims to deliver tangible value every day, striving to exceed our clients' service expectations and improve their financial results.

PMAMC has over 30 years of property, casualty and workers' compensation experience. Our company's performance reflects an innovative spirit, a focus on service and partnership and a corporate structure that promotes accountability and exceeding customer expectations.

School District Experience

PMA Companies is a corporation founded in 1915 in southeastern Pennsylvania as the Pennsylvania Manufacturers' Association Insurance Company following the enactment of the Pennsylvania workers' compensation law. Responding to both the business and societal needs of the day to protect workers who were injured on the job, we established ourselves as a premier provider of workers' compensation insurance to Pennsylvania businesses. Since then, we have continually evolved to meet our clients' changing needs, and we have grown into one of the premier risk management companies in the United States.

PMA Management Corp. was formed in 1991 to address the diverse needs of organizations considering alternative market products. PMA Management Corp. (PMAMC) is a subsidiary of PMA Companies, Inc. (formed in 1915), which became part of Old Republic International Corporation in 2010.

PMA Management Corp. has a branch office in NY state with over 150 employees. PMA Management Corp. has managed WC in the State of New York since 1998. The NY branch is supported by our corporate operations and customer service center. Company-wide, we employ over 1,400 employees at PMA.

PMA Management Corp. clients vary in size from those with several hundred to more than 55,000 employees. Our clients include state and local governments, universities, school systems, and healthcare providers to name a few. Our continued success is based on the results we have achieved for our clients. By properly balancing the need to protect our clients' reputation with their constituents, while simultaneously reducing their loss costs and increasing their bottom-line savings, we deliver a service that is truly unparalleled in the industry today.

PMA Management Corp. works with over 500 individual K-12 education clients in our services territory. Education is a target class of business for PMAMC. In addition to Rocky Point Union Free School District, we provide risk services to 140+ NYS schools and over 500 individual education clients.

Some of these clients include:

- *Brentwood UFSD*
- *Sachem CSD*
- *NYS Public Schools Trust*
- *Smithtown CSD*
- *Freeport Public Schools*



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Additional Information

PMAMC's Holistic Approach to Risk Management

PMAMC's holistic approach integrates three key risk strategies that can help Rocky Point Union Free School District reduce the frequency and severity of claims by focusing on risk control, claims, managed care (PMAcare+), risk management information services, data analytics, benchmarking, and value-added business solutions.

Pre-Loss

We will partner with you to understand your loss drivers and implement effective risk control measures. Our pre-loss strategies typically include the following:

- **Risk Management Assessment** – An assessment of your operations and risk management program to identify your historical loss exposures and opportunities to lower frequency and severity of claims.
- **Collaborative Goal Setting** – creation of goals and performance metrics to guide our improvement efforts.
- **Planning** – development of a plan with mileposts that will guide the improvement process and enhance results for a greater ROI.

PMAMC offers a full range of in-person and online risk control services and resources, including access to PMA Webservice®, our interactive online safety and risk management portal.

Loss Reduction

Our claims service is designed to aid in reducing your overall exposures and controlling your costs. **Early intervention on each claim** will help us manage claims to cost-effective resolutions and mitigate your exposure on all claims. Each step of our comprehensive claims management process is structured to achieve favorable results.

PMAcare+, our managed care program, which is **fully integrated with our claims service** and claims management system, focuses on:

- Predicting high-risk/high-cost claims for timely intervention
- Obtaining timely, quality care for injured workers
- Managing medical costs
- Reducing total claims costs.

PMAcare+ includes Nurse Triage (available 24/7 Nurse Triage via PMA Care 24), Medical Bill Review, Workers' Compensation PPO & Specialty Networks, Nurse/Medical Code Examiners, Pharmacy Benefits Management, Point of Sale Pharmacy Intervention Program, Nurse Case Management, and a Utilization Review Program with Medical Peer Review.

Post-Loss

PMAMC will **analyze your loss history, benchmark your performance against your peer group (where possible) and industry results**, and report back to you through our Account Performance Consultation reporting process. More important, we explain ways to improve your program and implement best practices. Our goal is to help you develop best practices that enhance your program and facilitate timely claims intervention.



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Loss Reporting

PMAMC offers Rocky Point Union Free School District a **selection of in-house claims reporting options** so you can choose the channel that's most convenient for Rocky Point Union Free School District. PMAMC can receive first notice of loss (FNOL) reports electronically through PMAMC's website or through PMAMC Cinch®, our internet-based risk management information system. You can report losses from mobile devices, including iPhones, iPads, Android smartphones, and tablets. Telephone, fax, and mail reporting options are also available to Rocky Point Union Free School District and its employees.

Claims reported electronically are immediately assigned a PMAMC claim number. That claim number will instantly be provided to the submitter and can be shared with your injured parties involved in the claim. For all reported claims, acknowledgement letters will be e-mailed to designated client contacts.

Optionally, for Workers' Compensation, PMAMC offers PMA Care24, a convenient **24/7 telephonic claim intake and first level clinical assessment** of the employee's injury by a Registered Nurse at the point of injury. The Registered Nurse serves as a patient advocate in determining the appropriate level of treatment pursuant to the injury assessment. If medical treatment is recommended, the employee will be referred to a provider within the PMAMC or client's Preferred Network. This interaction becomes the sole point of claim reporting to PMAMC and helps mitigate costs, unnecessary treatment utilization, and claim reporting redundancies.

PMAMC's Customer Service Center

Our 24/7, multilingual Customer Service Center (CSC) is available to answer high-level claims service needs of Rocky Point Union Free School District, their employees, injured parties, medical providers, and vendor partners. PMAMC's CSC provides a suite of support services for our claims professionals resulting in the ability for claims teams to focus on adjusting functions. Our investment in this key department is what continues to differentiate PMAMC in the marketplace and allows us to maintain low claims professional turnover and strong satisfaction of our employees and customers.



45,000+ Calls

Handled monthly

20 Seconds

To answer a call

<1.5% Rate

Of call abandonment

PMAMC's CSC is a center of excellence in providing exceptional quality of **data integrity and capture at claim intake**. Our Customer Service representatives are measured by their ability to capture and display the most accurate information in the claim files, including employee demographics, location coding data, and items required by state EDI.



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TPA & Risk Services for Workers' Compensation

Claims Handling

Upon receipt of a claim, **PMAMC ensures accuracy of all data points** provided on FNOL and follow-up for any missing information or any updates as needed. PMAMC claims system offers our customers the ability to track additional data fields specific to their business need that could be captured at the time of the claim reporting or throughout the life of the claim. These **custom codes** are viewable to our clients in PMAMC RMIS - Cinch®. PMAMC designed our claims service to **reduce our clients' overall exposures and control costs**. Each step of our comprehensive claims program for workers' compensation has been structured to achieve results, including driving claims to resolution in a timely, thorough, and cost-effective manner.

We recruit and retain claims professionals with strong technical knowledge in all lines of business. In fact, our adjusting staff has **an average of 12 years of workers' compensation** claims handling experience while our supervisors have **over 15 years of experience**. We leverage our roots as an insurance company with liability claims professionals who not only understand these distinct coverages, but also how best to resolve their claims. As part of our holistic approach, we maintain a tight linkage between claims management, PMAcare+, and risk control—enabling us to continually identify and **help you address emerging loss trends** while seeking to reduce your loss costs.

Upon receipt of a claim from the School District, a claim is generated in PMAMC claims system and referred to the supervisor for review and assignment. The supervisor utilizes their knowledge and claims facts available to assess claim complexity, provide guidance and determine the level of Claims Professional expertise that will be needed to most appropriately handle the file. The supervisor assigns the claim to the selected individual. The Claims Professional will receive an activity in the claims system notifying them of the claim receipt.

All claims are reviewed by the Claims Professionals within **24 hours of receipt** from the client and 24-hour contacts are completed. The number of contacts made on each claim is defined by Special Handling Instructions and PMAMC Best Practices. The Claims Professional will review the Special Handling Instructions for any guidelines on initial claim handling. During the initial investigation, the Claims Professional obtains all the necessary information that will be required to make a compensability determination for workers' compensation claims. **All of the information obtained is documented in the log notes and will be visible to the School District in our PMAMC RMIS system - Cinch®.** Additionally, Claims Professionals are **responsible for updating the data fields** that are mandatory for the state, carrier and client reporting. If the contact attempts are unsuccessful, the Claims Professional will follow-up via a letter or an email (if available) and make additional telephonic attempts to reach all parties.

PMAMC values customer service as a key result area of the Claims Professional staff. Therefore, upon reaching the parties involved in the claim, the Claims Professional will ensure that each contact is provided with all of the information necessary about the claim, next steps, outstanding items, etc. The Claims Professional will request any and all necessary information, including payroll records, police reports, medical records, investigative reports, and other relevant documents and upload them to the claim file.

For workers' compensation claims, it is the Claims Professional's responsibility to **ensure appropriate EDI filings** are completed timely and accurately. Additionally, workers' compensation lost time claims are evaluated by a PMAMC nurse case manager to **determine the need for clinical intervention** or nurse assignment. If the claim complexity and Special Handling Instructions indicate the need for a telephonic or a field case manager, a nurse is assigned to the file to work in collaboration with the Claims Professional to **help bring the injured worker back to safe and gainful employment**.



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PMAMC's Predictive Severity Model

PMAMC has developed a **proprietary algorithm** based on the claim information gathered over multiple decades of claim handling experience. The Predictive Analytics tool encompasses multiple models that incorporate **45 different data points** and analyzes their influences on claim exposure and likelihood of claim payment as the data points relate to each other. This model identifies combinations of factors that influence ultimate claim exposure and duration and serves as a tool to bring supervisor and claims professional attention to the key components of the claim to ensure the appropriate claim assignment and intervention at the right time.

PMAMC developed 2 main models to assist with claim exposure and duration analysis. These models are run daily to provide ongoing input and recommendations to the claims team:

1. The Severity Escalation at FNOL Model

This model produces a risk **score from a selection of low, moderate, or high**. This score serves as guidance to the claims team in determining, upon receipt of the initial claim, the proper trajectory for claim assignment to the correct claims professional. A low-risk score reflects a strong probability of the claim resulting in overall low ultimate probable exposure, whereas a high-risk score would drive supervisor assessment and assignment to the senior claims professional for complex analysis and handling. This FNOL model serves to ensure that the right claims are assigned to the right skill set level (based on complexity) at the right time within the life of a claim file.

2. The Severity Escalation at 30-day Model

This model builds upon the FNOL model and relies on the additional information that has been gathered by the claims professional since the loss was initially reported and throughout the first 30 days of the claim. This **additional data is used to re-score the claim** to identify files that may develop significantly, may change severity projections based on new information, or may require additional interventions based on new detail gathered during the investigation.

File Supervision

Unlike many TPAs, **PMAMC Claims Supervisors do not carry claim pendings and are solely responsible for guiding claims staff** on claim file direction, oversight, and compliance with customer's Special Handling Instructions. PMAMC maintains a span of control of 1:6 (or less) for our claims supervisor and claims professional staff.

WC Medical Only claims require supervisor review within 15 days from assignment to verify state and jurisdictional compliance. This review is documented in claim log notes. Subsequently, supervisor review is required within 90 days from assignment to identify closure opportunities or potential for escalation to an indemnity claim, based on claim definitions.

WC Indemnity claims require an **initial supervisor assignment note within 24 hours** after claim assignment. Supervisor Review on all claims classified as indemnity will be completed within 15 days from file assignment, 60 days thereafter, and every 90 days until resolution. Supervisors are required to comment regarding the accuracy and validity of reserves during each review.



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Claims Caseloads & Staffing

PMAMC's Claims Professional caseloads and support resources, such as our 24/7 Customer Service Center, are established to **allow our claims professionals to give each claim the time and attention** it requires. This allows us to complete more thorough investigations, and to exercise greater control over loss development. PMAMC will commit to providing the District with weekly reports outlining claims assigned to each Claims Professional to validate the proper caseload caps enforcement.



150

*Workers' Compensation Caseload Average
for Lost Time Files*

300

*Workers' Compensation Caseload Average
for Medical Only Files*

**Varies by program, jurisdiction, and line of business*

PMAMC's Adjuster Duties



Investigation

Appropriate, timely and thorough **24-hour contact investigation of claims of all exposures occur within 24 hours of the first notice of claim to PMAMC.** Contact attempt follow requirements as outlined in Special Handling Instructions. Daily attempts at contact are made to reach the impacted parties and are documented in the claim log notes and visible in PMAMC RMIS Cinch® system.



Reserving

Initial reserve is established within 15 business days of receipt of all new claims. Ongoing reserves are established based on **most probable outcome** based on the most current information available and are updated upon each review of the Action Plan as well as within 24 hours of any major claim event.



Action Planning

An **Action Plan is established within 30 days** of claim assignment and provides a summary of findings from Claims Professional investigation as well as details the strategies with specific goals and timeframes for executing key objectives to resolve claim. **Ongoing Action Plans** are completed at any major claim event or a minimum of every 90 days and include review of outstanding reserves on file.



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Settlement Authority

Authorization will be requested prior to the settlement of any claim for any line of insurance that we would administer. Clear and detailed instructions will be outlined in **Special Handling Guidelines** for reference of all claims professionals.

Our claims professionals will provide written requests for settlement authority in advance of the proposed settlement date. Requests will include a detailed evaluation of the claims exposures, along with input from defense counsel and your risk manager.

Litigation Management

PMAMC believes that **litigation management is a team effort** involving the Claims Professional, defense counsel, our client, and the carrier (if/where applicable) to best protect your interests. Upon knowledge of litigation, PMAMC Claims Professional will advise their School District contact no later than 48 hours and begin file preparation for assignment to the School District's preferred defense firms. Our litigation management procedures include collaborative development of defense strategies with counsel selected by the School District, preparation and maintenance of files necessary for legal defense of claims or claim-related activity, attendance of hearings, depositions, mediations, where appropriate. PMAMC Claims Professionals are required to document their files timely and accurately with the outcome of each legal proceeding and will provide a summary of such outline to the School District. All fees and expenses for legal services are evaluated for adherence to budget, accuracy, and compliance with terms of negotiated fee agreements. **PMAMC will pay all attorney, strategic partner, and other vendor fees within 30 days of receipt.**

Legal Billing Solution

To help the School District save money on legal fees, we provide an optional enhanced service called Legal Billing Solution. This service utilizes technology and legal professionals to analyze bills against clients' legal guidelines and rate structures. In order to create clear expectations, PMAMC will collaborate with the School District to establish Customized Defense Counsel Guidelines and rates. The TPA Compliance Team at PMAMC will make sure the School District sees outcomes in the legal expenditure area through client onboarding, program support, and quality assurance. All aspects of invoices received from defense counsel will be reviewed by algorithmic intelligence and legal professionals. This enables Claim Professionals to concentrate on strategic litigation management instead of legal invoice management. We can provide the School District reports of the findings to observe trends and drive down costs.

Claims Reviews and Status Reports

We are committed to providing the School District with all of the tools and information necessary to effectively manage their programs. This is accomplished by providing access to detailed claims information through PMAMC Cinch®, by conducting in-person or telephonic claims reviews, and through the presentation of our Account Performance Consultation.

PMAMC will offer two annual telephonic claim reviews to the School District and all its employees as requested. These reviews will serve to provide up-to-date loss information and will allow all parties to discuss detailed action plans and resolution strategies on the selected claims files being reviewed.



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PMAMC's Claim Reviews are:

- customized for the audience involved in the review e.g. Risk Managers, Human Resource Managers, Financial Executives
- included for claims with incurred over \$25,000
- performed 2 times each year, telephonically or in-person (costs may apply to in-person for travel)
- delivered by the Client Account Manager and claims representatives(s)

PMAMC's Claims Reviews and the reports are meant to enhance the client experience while creating more operational efficiency.

- Streamlined process for the claims teams to complete the reports
- Automatic email reminders to the staff as the date of the review is approaching
- Q/A reports designed to assist the supervisors in managing the claim review preparation
- Corporate calendars for claim review meetings
- More efficient process for the Account Managers to schedule and prepare for the claim review meeting
- Customization of the report for the client - what is most important to them at the review
- Modernization of the report including key claim indicators

Diary Management

All open claims are maintained on a diary by PMAMC Claims Professionals and PMAMC supervisors. Claims on diary are reviewed at a minimum of every 90 days. PMAMC's supervisors have access to the claims professional's diary. All diary activities will have a corresponding entry or document in the claim file. Each claim has a diary set for a future date to ensure proactive file handling and resolution. PMAMC management teams and Quality Assurance Specialists review diary reports on a regular basis to address any delays in proactive file handling and to offer guidance.

Subrogation & Recovery

PMAMC offers specialized fee-based services for claims with subrogation and recovery opportunities throughout the United States. These services provide an enhanced level of focus, expertise, and specialization. Our subrogation specialists are highly trained in jurisdictional nuances and have developed state-specific strategies to maximize recoveries for our customers

PMAMC also specializes in **maximizing excess recoveries for Production Resource Group** through our fee-based recovery services. PMAMC will identify claims for excess reporting based on the requirements on the specific carrier and send the initial excess notification to the excess carrier in a timely manner as well as provide a copy for your records. Following the carrier notification, **PMAMC will aggressively pursue all possibilities of excess insurance reimbursement** and document their efforts in the claim log notes. This approach will apply for all potential recoveries including, but not limited to, third party liens, contribution, special/second injury fund, and others.



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Claim Indexing & Special Investigation Unit

All Workers Compensation indemnity claims are indexed through the Insurance Services Office system and results documented in the claim log notes. If there are records that are relevant to the claim, the Claims Professional will follow-up to obtain those records. **Claims are automatically alerted to any new index matches within the 12-month period from the original indexing. The Claims Professional re-indexes the claims every 12 months thereafter.** Indexing claimants with the Central Index Bureau and the National Insurance Crime Bureau allows us to determine if the claimant has filed any other claims. This ensures that you are responsible only for the injuries related to your accident. Indexing is a critical tool in our fraud control program. Suspect claims are reviewed with the client and our Special Investigative Unit (SIU) to determine additional action steps.

PMAMC employs a full-time SIU that is made available to the School District typically at no additional cost. The SIU is staffed with industry fraud professionals with over 25 years of experience who are committed to detecting, deterring, and preventing fraud while protecting the assets of our clients. Our SIU works in conjunction with the PMAMC Claims Professionals. This collaborative approach has resulted in significant savings for our clients and criminal insurance fraud prosecutions in many states. PMAMC's SIU is responsible for fraud investigations, fraud training, regulatory anti-fraud compliance, private investigator vendor management, and maintaining PMA's Anti-Fraud Plan.

PMAMC Recover-At-Work Solution®

PMAMC offers Recover -At- Work solution for our customers looking to improve their outcomes in this area. PMAMC utilizes internal Recover-At-Work specialists (RAWS) **trained in vocational rehabilitation with certifications in rehabilitation specialty and occupational health.** These resources are utilized to assist our customers with analysis and development of a comprehensive job demand bank, creation of modified duty positions within unique departments understanding complexities of each employer's business. Our RAWS are uniquely positioned to provide our customers with solutions and recommendations around development and **implementation of the return to work programs at departmental or organizational levels. Additionally, RAWS are often utilized to provide transferrable skill analysis, resume reviews and assist with cross-departmental job placements within employer's organization. Unlike a formal vocational rehabilitation specialist assigned by the state, through defense counsel or due to litigation, the RAWS is focused on offering injured employees support and confidence necessary for the return to work in temporary or permanent capacity.**

PMAMC Medicare Solutions

PMAMC offers dedicated centralized resources for oversight and management of all Medicare and Medicaid products and services. Our PMAMC Medicare Solutions division provides our customers with access to **best-in-class services for all of their Medicare and Medicaid needs,** including Medicare Set-Asides, Social Security checks, conditional liens and other related services. We provide **extensive quality oversight** to these services and conduct regular audits and quality assurance initiatives to ensure compliance with PMAMC Service Level standards and expectations.

Claims professional will evaluate each claim on its specific merit and provide recommendations related to the need for Medicare Set-Aside, conditional lien searches, structured settlement considerations. Recommendations are made in collaboration with case managers, defense counsel and other parties.



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Access to Telehealth

Telemedicine connects injured workers with specially trained physicians and physical therapists for medical diagnosis and treatment online, including prescribing medications when necessary. Injured workers can have one-on-one video consultations right from the comforts of home via their smartphones, tablets, or computers.



Telerehabilitation

- Injured workers can avoid delays in getting the physical therapy (PT) they need with quality care through telerehabilitation
- Telerehabilitation offers one-on-one PT sessions with certified physical therapists via a smartphone, tablet, or computer
- 30- or 45-minute sessions are available 7 days a week in all 50 states

Medical Peer Review

PMAMC engages a board-certified provider, in the same specialty as the injured employee's treatment physician, to review the treatment file and **render an expert opinion of medical treatment** for reasonableness and necessity. The Peer Review physicians are also engaged to provide an expert opinion in cases that warrant further review as a part of the Utilization Review process or through other jurisdictional requirements.



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Customer Education, Experience, & Satisfaction

Special Handling Instructions

Understanding and meeting the unique needs of our customers is at the heart of our service model. PMAMC prides itself on being a ***high-touch, customer-focused organization*** with strong customization capabilities. As a part of onboarding of all PMAMC clients, we spend time to learn your requirements, your internal structure, unique program goals and custom requests. This information is utilized to partner with you to develop a ***comprehensive, customized Special Handling Guideline document*** that is stored in our claims system for the reference and utilization by PMAMC claims professionals and internal supporting departments. This document includes guidelines for handling your standard as well as catastrophic claims.

We work closely with you to develop and re-evaluate this document on an ongoing basis to ensure the timeliest information is being provided to our staff.

The Special Handling Instructions are developed to memorialize a mutual agreement between our organizations about how we will be servicing your program. It can include reserve notifications, initial contact information, specifics about benefit payments, settlement authority levels, attorney selection, and other areas important to you and your team.



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Comprehensive & Integrated Managed Care



Understanding and meeting the unique needs of our customers is at the heart of our service model. PMAMC prides itself on being a **high-touch, customer-focused organization** with strong customization capabilities. As a part of onboarding of all PMAMC clients, we spend time to learn your requirements, your internal structure, unique program goals and custom requests. This information is utilized to partner with you to develop a **comprehensive, customized Special Handling Guideline document** that is stored in our claims system for the reference and utilization by PMAMC claims professionals and internal supporting departments. This document includes guidelines for handling your standard as well as catastrophic claims.

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PMA Webservice®

PMAMC's clients also have access to PMA Webservice®—an on-line portal of safety and risk management resources exclusively for our clients. Our Risk Control Consultants designed PMA Webservice® to offer convenient access to practical loss prevention and safety information and solutions, including technical bulletins, safety and compliance training programs, monthly webinars led by PMAMC industry specialists, as well as tools and resources to enhance your safety and health programs.



PMAMC Learning Academy

PMAMC has a comprehensive learning academy accessible to all employees which includes an **on-demand Video Reference Library, annual topic-focused workshops, and personalized learning sessions**. This provides PMAMC employees the ability to expand upon skills related to our technology, all disciplines of the claims process, including legal management and strategic resolutions, managed care partnerships, and risk control. We also frequently use focused training sessions to concentrate new policies and procedures, case law developments, and changes in rules and regulations.



Satisfaction Surveys

PMAMC offers our customers an opportunity to **assess the experience of their employees and injured parties** throughout the claims process by providing Satisfaction Surveys that can be delivered at varied frequency and be focused on any specific areas including customer service of the claims handling staff, medical care, claim handling experience, and others. These surveys could also be offered to the School employees to assess their satisfaction level with this program.



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Risk Control Services

Drawing on **100+ years of safety, risk management and commercial insurance experience**, our risk control team has provided cost effective safety and risk management services to organizations throughout the United States. With more than **60 risk control consultants on staff**, our risk control services are designed to prevent claims, support effective safety and risk management practices and lower the cost of risk for our clients.

Outlined are core skills of the PMAMC's risk control team and how we believe the District will benefit from an expanded engagement with our risk control team, **if you so choose**. *Please note that these services are only applicable for clients who purchase the program.*

Data Analytics

Organizations that leverage data analytics will better understand their business, their industry, their strengths and their opportunities for improvement. **PMAMC will bring clarity to complex data, analyzing loss trends** to pinpoint areas needing improvement and ultimately reduce the frequency and severity of your losses and costs. We provide analytic solutions, including **stewardship reporting, loss trending analysis, industry comparison** and goal establishment. PMAMC can provide a "Performance Indicator Report" for the District's program where we normalize and rank performance. (see below).

Risk Assessment

PMAMC risk control can support the District's underwriting process by assessing exposures presented by employees. We have experience working closely with underwriters to identify risk characteristics which drive performance and selection.

Safety & Risk Management Training

PMAMC's risk control team is also available to develop and present customized safety and risk management training events to address the specific needs of the fDistrict and its employees via remote training platforms or in live on-site training (post COVID).

Risk Improvement Support

Every organization can improve their safety and risk management performance. Using data analytics, we work with organizations to understand historical loss trends and develop plans to prevent claims and reduce claim costs.

OSHA & Regulatory Compliance Support

To help our clients manage their OSHA compliance and other regulatory safety standards we offer a **broad range of safety training and safety program assistance designed to ensure compliance and keep employees safe**. We routinely provide training and program development around OSHA lockout / tagout, fall protection, hazard communication, ergonomics, blood borne pathogens, personal protective equipment, emergency planning and workplace violence to name a few. To support these efforts, many of our consultants are authorized **OSHA 10 and 30-hour outreach trainers**. In addition to OSHA compliance, we also offer many programs designed to manage the liability exposures associated with facility conditions, motor vehicle operations and employment practices.



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OSHA REPORTING

PMAMC offers our clients access to our proprietary **OSHA tool through PMA Cinch**, our online risk management information system. This tool offers users the ability to quickly and efficiently track the recordability of OSHA cases, and easily complete and generate OSHA 300 and 300A logs in compliance with OSHA regulations.

OSHA SPECIALIST

This option incorporates trained OSHA Recordkeeping Specialists who can help alleviate the organizational burdens of OSHA tracking and recordability. **These specialists can help with recordability, tracking, and OSHA log generation.** All services are performed in accordance with the OSHA requirements and special handling guidelines for our clients, including:

- Assistance with customized reporting
- Reporting by state, region, or specific location
- Flexible report generation frequency to support our clients' unique OSHA compliance needs

PMAMC's Organizational Safety Institute

PMA Management Corp. is committed to helping our clients strengthen their risk management efforts in a variety of ways, including virtually through our Organizational Safety Institute. Live and on-demand sessions led by our subject matter experts can help your organization and you lead change to obtain optimum results. Our unique learning events reflect our passion for organizational safety, health and wellness—and our desire to make a tangible difference.



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Scope of Services

PMA will comply with the below scope of services that were outlined in the RFP but has the following exceptions:

For k. and l.; the Workers Compensation Board's assessments are no longer in the format outlined in those sections below.

- a. Consult with District personnel and design and implement the District's internal claims reporting system. Provide training to selected District personnel to ensure the efficacy and accuracy of the reporting system.
- b. Review all claims to determine whether an investigation is appropriate. Provide the necessary resources to investigate nation-wide claims. If an investigation is necessary, undertake the investigation immediately.
- c. Determine whether a claim is compensable.
- d. Completely oversee any claims including, but not limited to, claims adjustment services, general monitoring of medical treatment in order to ensure appropriate treatment and minimize medical costs, and auditing of medical bills.
- e. Handle all pending workers' compensation claims that have arisen since the inception of the self-insured plan.
- f. Ensure that the District's open files are properly maintained and available for review and audit.
- g. Return closed or inactive files.
- h. Track medical services that are subject to the Department of Health surcharges mandated by Public Health Law, direct payment of applicable charges and file all necessary forms with the Department of Health on a monthly basis.
- i. Create and implement a payment procedure for lost time benefits, medical bills and expense payment in consultation with the District. Prepare and process payment documentation, including payment authorizations and copies of bills.
- j. At the conclusion of the calendar year, prepare 1099 forms for distribution to the appropriate vendors. Review all vendor information for payments made in the current calendar year to ensure that the 1099 forms match the IRS records for name and tax identification number.
- k. In April of each year, if required by law, review, complete and return the Assessment Base Factor Report required by the Workers' Compensation Board to determine the amount of assessments levied against self-insured employers in New York and verify the indemnity payments made from April 1 of the prior year to March 31 of the current year, consistent with the Workers' Compensation Board fiscal year. Review, complete and return other reports required by law.
- l. Review all assessment billing notices for accuracy. If the District becomes overpaid for a Workers' Compensation Board fiscal year due to variations in lost time experience from year to year, verify that all future credits issued to the District by the Workers' Compensation Board are properly issued and applied.
- m. Develop a loss prevention program in consultation with the District for the purpose of minimizing the number of workers' compensation injuries.
- n. Regularly update the District on changes to Workers' Compensation Law as they apply to the District's program.
- o. Provide a cumulative cost summary report encompassing all individual claim costs and all other operational costs of the self-insured plan.
- p. Arrange for the retention of counsel to represent the District on employer's liability claims, as needed.



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Contracts

PMAMC acknowledges the district's desire to include the contract terms set forth in Appendix "A" to the RFP. Any contract awarded will be at mutually agreeable terms.
See sample contract in the attachments.



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Attachments

- Details of Management and Key Personnel
- References
- Contact Details
- Vendor Information Sheet
- Certification - Iran Divestment Act of 2012
- Statement of Non-Collusion
- Related Party Affidavit
- Hold Harmless Agreement
- Declaration Page
- Certificates of Insurance
- Sample Agreement



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DETAILS OF MANAGEMENT AND KEY PERSONNEL

Proposers shall provide details, including curriculum vitae, of all personnel who will be engaged in the provision and management of the services required by this RFP. Specifically, Proposers shall provide this information in relation to personnel who will be responsible for:

- Identity of the key personnel who will be responsible for performing each services/task.
- Identity of the person who will be responsible for coordinating this inspection.
- Technical knowledge of the personnel who will be responsible for performing each service/task.
- Qualifications of the personnel responsible for each service/task.
- Relevant qualifications and training.
- Length of time with the Proposer's organization.
- Position now held with the Proposer and length of time in this position.
- Experience (and role) in providing similar services over the past three years

Name	Qualifications	Length of Time w/PMA
John Iorio	Regional Claims Supervisor, NYS Licensed Adjuster	13 years
John Benemio	Account Claims Representative, NYS Licensed Adjuster	2 years
James Galayda	Account Claims Associate II, NYS Licensed Adjuster	5 years
Brian Guckert	Account Specialist, NYS Licensed Adjuster	18 years
Rachel Brand	Claims Manager, NYS Licensed Adjuster	10 years



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REFERENCES:

Proposers must include with their proposal, a minimum of three (3) references where the Proposer provides similar services to the services described herein. References must include contact names and telephone numbers. Proposers must also demonstrate that the firm or at least one principal in the firm has been providing the necessary services for a minimum of three (3) years. Failure to include this information with your proposal may result in the RFP's rejection.

Reference (Name & Company)	Telephone Number
1. Stacy O'Connor Asst. Superintendent of Finance and Operations Brentwood UFSD	631-434-2311
2. Ron Sacks School Business Administrator Sachem CSD	631-471-1352
3. David Beggins Asst. Superintendent for Business William Floyd UFSD (President of NYS Public Schools Trust)	631-874-1684
4. Andrew Tobin Asst. Superintendent of Finance and Operations Smithtown CSD	631-382-2116
5. Freeport Public Schools Ivono Stintug Asst. Business Administrator	516-867-5235



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CONTACT DETAILS

1.	Company Name	PMA Management Corp.
2.	Address	5789 Widewaters Parkway Dewitt, NY 13214
3.	Telephone Number	315-445-6401
4.	Fax Number	315-445-6371
5.	Contact Person	Brian Guckert
6.	Position in Company	Account Specialist
7.	Email Address	
8.	Website (if applicable)	www.pmacompanies.com
9.	Number of Employees	Full Time: 1440 Part Time: 19



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VENDOR INFORMATION SHEET

Rocky Point Union Free School District
Purchasing Department
90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778

VENDOR INFORMATION SHEET

VENDOR NAME: PMA Management Corp.

ADDRESS: 380 Sentry Parkway, P.O. Box 3031, Blue Bell, PA 19422

CONTACT: Brian Guckert

TELEPHONE: 315.445.6401 FAX: 315.445.6371

EMAIL: _____

TYPE OF ENTITY: CORP. PARTNERSHIP__ INDIVIDUAL__ LLC__

FEDERAL EMPLOYEE ID#: 23-2652239 OR SOCIAL SECURITY#: _____

DATE OF ORGANIZATION: 1991

If a non-publicly owned Corporation:
CORPORATION NAME: PMA Management Corp.

LIST PRINCIPAL STOCKHOLDERS: (5% of outstanding shares)

LIST OFFICERS AND DIRECTORS:

NAME	TITLE
<u>See Attached List</u>	_____
_____	_____
_____	_____

If a partnership:
PARTNERSHIP NAME: _____

LIST PARTNERS NAMES:

Proposer's Name PMA Management Corp.



CERTIFICATION – IRAN DIVESTMENT ACT OF 2012

Rocky Point Union Free School District
Purchasing Department
90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778

CERTIFICATION OF COMPLIANCE WITH THE IRAN DIVESTMENT ACT

As a result of the Iran Divestment Act of 2012 (the "Act"), chapter 1 of the 2012 Laws of New York, a new provision has been added to Stat Finance Law (SFL) § 165-a and New York General Municipal Law § 103-g, both effective April 12, 2012. Under the Act, the Commissioner of the Office of General Services (OGS) will be developing a list of "persons" who are engaged in "investment activities in Iran" (both are defined terms in the law) (the "Prohibited Entities List"). Pursuant to SFL § 165-a(3)(b), the initial list is expected to be issued no later than 120 days after the Act's effective date at which time it will be posted on the OGS website.

By submitting a bid in response to this solicitation or by assuming the responsibility of a Contract awarded hereunder, each Bidder/Contractor, any person signing on behalf of any Bidder/Contractor and any assignee or subcontractor and, in the case of a joint bid, each party thereto, certifies, under penalty of perjury, that once the Prohibited Entities List is posted on the OGS website, that to the best of its knowledge and belief, that each Bidder/Contractor and any subcontractor or assignee is not identified on the Prohibited Entities List created pursuant to SFL §165-a(3)(b).

Additionally, Bidder/Contractor is advised that once the Prohibited Entities List is posted on the OGS Website, any Bidder/Contractor seeking to renew or extend a Contract or assume the responsibility of a Contract awarded in response to this solicitation must certify at the time the Contract is renewed, extended or assigned that it is not included on the Prohibited Entities List.

During the term of the Contract, should the School District receive information that a Bidder/Contractor is in violation of the above-referenced certification, the School District will offer the person or entity an opportunity to respond. If the person or entity fails to demonstrate that he/she/it has ceased engagement in the investment which is in violation of the Act within 90 days after the determination of such violation, then the School District shall take such action as may be appropriate including, but not limited to, imposing sanctions, seeking compliance, recovering damages or declaring the Bidder/Contractor in default. The School District reserves the right to reject any bid or request for assignment for a Bidder/Contractor that appears on the Prohibited Entities List prior to the award of a contract and to pursue a responsibility review with respect to any Bidder/Contractor that is awarded a contract and subsequently appears on the Prohibited Entities List.

I, Michael MacAulay, being duly sworn, deposes and says that he/she is the

President of the PMA Management Corp. Corporation and that neither the

Bidder/Contractor nor any proposed subcontractor is identified on the Prohibited Entities List.

Michael MacAulay
SIGNED

SWORN to before me this

3rd day of April 2024

Notary Public: Tammy E. Markward Proposer's Name PMA Management Corp. 12

Commonwealth of Pennsylvania - Notary Seal
Tammy E. Markward, Notary Public
Montgomery County
My Commission Expires January 17, 2028
Commission Number 1200664



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STATEMENT OF NON-COLLUSION

Rocky Point Union Free School District
Purchasing Department
90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778

STATEMENT OF NON-COLLUSION

For the purpose of this Statement of Non-collusion, the use of the words bid or bidder are interchangeable and synonymous with the words proposal and proposer.

By submission of this bid/proposal, the vendor certifies that he is complying with section 103-D of the General Municipal Law. Section 103-D of the General Municipal Law reads as follows:

103-D. Statement of non-collusion in bids and proposals to political subdivisions of the state. Every bid or proposal hereafter made to a political subdivision of the state of any public department, agency, or official thereof where competitive bidding is required by statute, rule, regulation of local law, for work or services performed, to be performed, or goods sold or to be sold, shall contain the following statement subscribed by the bidder and affirmed by such bidder as true under the penalties of perjury: non-collusive bidding certification.

- (a) By submission of this bid, each bidder and each person signing on behalf of any bidder certifies, and in the case of a joint bid, each party thereto certifies as to its own organization, under penalty of perjury, that to the best knowledge and belief:
 - (1) The prices in this bid have been arrived at independently without collusion, consultation, communication, or agreement for the purpose or restricting competition, as to any matter relating to such prices with any other bidder or with any competition;
 - (2) Unless otherwise required by law, the prices which have been quoted in this bid have not been knowingly disclosed by the bidder and will not knowingly be disclosed by the bidder prior to opening, directly or indirectly, to any other bidder or to any competition; and
 - (3) No attempt has been made or will be made by the bidder to induce any other person, partnership or corporation to submit or not to submit a bid for the purpose of restricting competition.
- (b) A bid shall not be considered for award nor shall any award be made where (a) (1), (2), and (3) above have not been complied with; provided, however that if in any case the bidder cannot make foregoing certification, the bidder shall so state and furnish with the bid a signed statement which sets forth in detail the reasons therefore. Where (a) (1), (2), and (3) above have not been complied with, the bid shall not be considered for award, nor shall any award be made unless the head of the purchasing unit of the political subdivision, public department, agency or official subdivision, public department, agency or official thereof to which the bid is made, or his designee, determines that such disclosure was not made for the purpose of restricting competition.

The fact that the bidder (a) has published price lists, rates, or tariffs covering items being procured, (b) has informed prospective customers of proposed or pending publication of new or revised price lists for such items, or (c) has sold the same items to other customers at the same prices being bid, does not constitute, without more, a disclosure within the meaning subparagraph one (a).

Any bid thereafter made to any political subdivision of the state or any public department, agency or official thereof by a corporate bidder for work or services performed or to be performed, or goods sold or to be sold, where competitive bidding is required by statute, rule, regulation or local law, and where such bid contains the certification referred to in subdivision one of the section, shall be deemed to have been authorized by the board of directors of the bidder, and such authorization shall be deemed to include the signing and submission of the bids and the inclusion therein of the certificate as to non-collusion as the act and deed of the corporation.

PMA Management Corp.

Print or Type Firm Name	_____	April 3, 2024
Authorized Signature	<i>Michael MacAulay</i>	Date
Michael MacAulay	President	
Print or Type Name	Print or Type Title	
Proposer's Name	PMA Management Corp.	13



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RELATED PARTY AFFIDAVIT

Rocky Point Union Free School District
 Purchasing Department
 90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778

RELATED PARTY AFFIDAVIT

STATE OF Pennsylvania COUNTY OF Montgomery; being duly sworn, deposes and says:

1. That (s) he is an officer or representative of PMA Management Corp. and that (s) he has the authority to sign this affidavit.
2. This affidavit is offered as an inducement to Rocky Point Union Free School District to award to PMA Management Corp. Such purchase contracts for goods or services as directed by the Board of Education, in accordance with New York State law and with Rocky Point Union Free School District policy.
3. That no Officer, Employee or Stockholder of the above-referenced Vendor is an Employee, in any position, at Rocky Point Union Free School District.
4. That no Officer, Employee or Stockholder of the above-referenced vendor is related to an employee in any position, administrator or Board Member, at the Rocky Point School District at 90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778 other than as disclosed below:

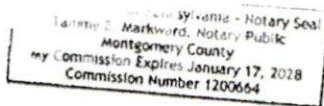
Vendor: List Officer, Employee or Stockholder's Name	Position with Vendor	Employee, Administrator or Board Member Name	Relationship between parties

Signed *Michael Marafel* Date 4/3/24

Seal of the Corporation (If Available)

Sworn to before me this 3rd
 Day of April 2024

Tammy E. Markward
 Notary Public Signature Proposer's Name PMA Management Corp.
 SEAL



DECLARATION PAGE

Rocky Point Union Free School District
Purchasing Department
90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778

DECLARATION PAGE

NAME OF FIRM: PMA Management Corp.

ADDRESS: 380 Sentry Parkway, P.O. Box 3031, Blue Bell, PA 19422

FEDERAL / TAX IDENTIFICATION NUMBER: 23-2652239

The above-mentioned bidder declares and certifies:

1. That the said bidder is of lawful age and the only one interested in this bid, and that no one other than said bidder has any interest herein.
2. That this bid is made without previous understanding, agreement or connection with any other person, firm or corporation making a bid for the same purpose, and is in all respects fair and without collusion of fraud.
3. That no member of the Board of Education of the Rocky Point Union Free School District nor any officer or employee or person whose salary is payable in whole or in part from the treasure of said Board of Education is directly or indirectly interested in this bid or in the supplies, materials, equipment, work or services to which it is related, or in any portion of the profits thereof.
4. That said bidder has carefully examined and understands each and every requirement contained within this Bid document, and that all addenda to this Bid, if any, are part of the Bid and shall, if successful in this bid, furnish and deliver at the prices bid and within the time stated, all the materials, supplies, apparatus, goods, wares, merchandise, service or labor for which this proposal is made.
5. That in the event of the failure of said bidder to perform within the time stated in the bid specifications or on the purchase order as the case may be, the undersigned agrees to pay the Board, on demand, the difference between the price(s) bid and the price(s) for which such item(s) or service(s) shall be subsequently purchased.

Signed Michael Markward Date 4/3/24

SEAL OF CORPORATION

Sworn to before me this 3rd

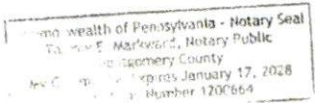
Day of April, 2024

James Markward

Notary Public Signature

SEAL

Proposer's Name PMA Management Corp.



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PMAMC BOARD OF DIRECTORS

PMA MANAGEMENT CORP.

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Derek R. Hopper

Stephen L. Kibblehouse

Michael S. MacAulay

John Santulli III

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Chief Executive Officer

President

Executive Vice President, General Counsel & Secretary

Senior Vice President, Chief Financial Officer and Treasurer

Senior Vice President, Human Resources and Facilities

Senior Vice President and Chief Claims Officer

Vice President – Risk Control Services

Vice President – NY Claims

Vice President, Asst General Counsel, Asst. Secretary

Vice President – Human Resources

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Vice President, Asst General Counsel, Asst. Secretary

Vice President – Claims Client Service

Vice President and Deputy Chief Information Officer

Vice President – Chief Accounting Officer

Assistant Vice President – Texas Claims

Assistant Vice President

Assistant Vice President and Chief Information Security Officer

Assistant Vice President – Claims for Empire and MidAtlantic Regions

Assistant Vice President – Claims

Assistant Vice President – Claims

Assistant Vice President – Claims

Assistant Vice President of TPA Business Solutions

Assistant Vice President – Claims

Assistant Vice President – Southern Regional Claims

Assistant Vice President

As of March 18, 2024

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Corporate Tax Officer

Joan Aguilucho

As of March 18, 2024



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CERTIFICATES OF INSURANCE / NY LICENSE



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
07/05/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Brummel Brothers, Inc. 307 N. Michigan Avenue Chicago, Illinois 60601 312.762.4274	CONTACT NAME: Eric Stroka PHONE (A/C No., Ext): 724-834-5000 FAX (A/C No.): 724-834-4025 E-MAIL ADDRESS: INSURER(S) AFFORDING COVERAGE NAIC # INSURER A: Old Republic Insurance Company 24147 INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:
INSURED Old Republic International Corporation PMA Management Corp 307 North Michigan Avenue Chicago, Illinois 60601	

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADGL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY CLAIMS-MADE OCCUR GEN'L AGGREGATE LIMIT APPLIES PER POLICY PROJECT LOC OTHER					EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (EA occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMPROP AGG \$
	AUTOMOBILE LIABILITY ANY AUTO OWNED AUTOS ONLY SCHEDULED AUTOS HIRED AUTOS ONLY NOT OWNED AUTOS ONLY					COVERED SINGLE LIMIT (EA accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB OCCUR EXCESS LIAB CLAIMS-MADE DED RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input type="checkbox"/> N/A				PER STATUTE OTHER E L EACH ACCIDENT \$ E L DISEASE - EA EMPLOYEE \$ E L DISEASE - POLICY LIMIT \$
A	Professional Liability		0Z03946634	7/1/2023	7/1/2024	\$5,000,000 each occurrence \$5,000,000 aggregate

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

--	--

CERTIFICATE HOLDER Evidence of Insurance	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
--	--

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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
06/08/2023

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PRODUCER Aon Risk Services Central, Inc. 200 East Randolph Street Chicago, IL 60601	CONTACT NAME: Mike Hayes / Emily Truesdell		
	PHONE (A/C, No, Ext): 312-381-0065 / 312-381-4259	FAX (A/C, No):	
E-MAIL ADDRESS:			
INSURED Old Republic International Corporation / PMA Management Corp. of New England 307 North Michigan Avenue Chicago, IL 60601	INSURER(S) AFFORDING COVERAGE		NAIC#
	INSURER A: Zurich American Insurance Co.		16535
	INSURER B: American Zurich Insurance Co.		40142
	INSURER C: Navigators Insurance Company		42307
	INSURER D:		
	INSURER E:		
INSURER F:			

COVERAGES
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS. Limits shown are as requested

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER			GLO 0269598-12	06/15/2023	06/15/2024	EACH OCCURRENCE \$2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$500,000 MED. EXP (Any one person) \$5,000 PERSONAL & ADV INJURY \$2,000,000 GENERAL AGGREGATE \$6,000,000 PRODUCTS - COMP/OP AGG \$6,000,000
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY			BAP 0269599-12	06/15/2023	06/15/2024	COMBINED SINGLE LIMIT (Ea accident) \$2,000,000 BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)
C	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$			CH23UMR201Z8VIV	06/15/2023	06/15/2024	EACH OCCURRENCE \$10,000,000 AGGREGATE \$10,000,000
A	<input checked="" type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICERS/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N/A		WC 0269596-12 (DED) WC 0269597-12 (RETRO)	06/15/2023 06/15/2023	06/15/2024 06/15/2024	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. DISEASE-EA EMPLOYEE \$2,000,000 E.L. DISEASE-POLICY LIMIT \$2,000,000

DESCRIPTION OF OPERATIONS/LOCATIONS/VEHICLES (Attach ACORD 101. Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER	CANCELLATION
EVIDENCE OF INSURANCE	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE Aon Risk Services Central, Inc.

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**Workers'
Compensation
Board**

KATHY HOCHUL
Governor

CLARISSA M. RODRIGUEZ
Chair

STEVEN M. SCOTTI
Executive Director

January 25, 2023

Via email to:

Brian J. Barry, Esq.
Law Offices of Brian J. Barry
5789 Widewaters Parkway
Dewitt, New York 13214

Re: License No. 10060, T#100072
PMA Management Corporation

Dear Attorney Barry:

This correspondence is to inform you that at the New York State Workers' Compensation Board (Board) meeting held on January 24, 2023, the Board voted to grant the renewal application for the above-referenced third-party administrator. The license is granted for the period beginning January 1, 2023 and ending December 31, 2025.

If you have any questions or require additional information regarding your license, do not hesitate to contact me at

Sincerely,

/s/ Eugene Martin

Eugene Martin
Office of General Counsel

New York State Workers' Compensation Board

125 State Street, Schenectady, NY 12305 | (518) 632-4996 | wcb.ny.gov



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A photograph of a man and a woman in an office setting, high-fiving each other. The man is on the left, wearing a light blue shirt, and the woman is on the right, wearing a dark blue blazer. They are both smiling. The background shows a brick wall and a window with blinds. A document with the word 'COMPANIES' is visible in the upper right corner.

COMPANIES

THANK YOU

WE WOULD BE HONORED TO BE SELECTED AS
YOUR TPA AND RISK SERVICES PARTNER

PMA MANAGEMENT CORP.



May 6, 2024

Rocky Point UFSD
Attn: Chris Van Cott
90 Rocky Point Yaphank Rd
Rocky Point, NY 11778

Re: RFP for Workers' Compensation TPA and Risk Services – Pricing Proposal

Dear Mr. Van Cott:

Please accept this letter to inform you that the Pricing Proposal for the RFP for Workers' Compensation TPA and Risk Services is being modified. The annual fee has been reduced to \$20,000 per year for all 5 years (7/1/24 – 7/1/29). All other terms remain as outlined in the proposal.

Please let me know if you have any questions.

Sincerely,

A handwritten signature in blue ink, appearing to read "Brian Guckert".

Brian Guckert
Account Specialist
315-640-0550

Pricing Proposal

PMA Management Corp. offers a complete and comprehensive claims management and risk services program.

Claims Handling Activities:

- Investigation
- Three-Point Contact
- Action Planning
- Claims Processing
- Compensability Decisions
- SIF Investigation
- Excess Reporting & Recovery
- Fraud Prevention / SIU Capabilities
- Account Management
- Quality Assurance Program Oversight
- Structured Settlements
- Pre-Settlement Advisories
- EDI with State as Required
- 1099 Reports
- Settlement Authority
- Resolution Negotiation
- Litigation Management
- Check Issuance
- Payment Registers
- Claim Review Meetings
- Stewardship Meeting
- Self-Insurance Re-Application Assistance
- First Report of Injury Filed with State Agency
- Customized Claim Handling Instructions
- Reserve Advisories
- Patriot Act Compliance
- Office of Federal Asset Control Compliance
- Claim Acknowledgements
- Direct Deposit of Indemnity Payments

PMAcare+ Managed Care:

- Medical Bill Review
- Complex Bill Review
- Out-of-Network Bill Review
- Early Intervention Nurse Assessment on Lost Time Claims
- PPO & Specialty Network Access
- PPO Radius Listing & Mapping to Locations
- Pharmaceutical Benefit Management
- Case Management

Safety/Loss Prevention Services:

- Webservice Access
- PMA Technical Bulletins
- PMA Monthly Web Events Training
- 300+ Safety Videos/DVD Library
- WC/Liability Performance Indicator Report
- Risk Management Assessment
- PMA Insights White Papers
- PMA Engineering & Safety Services

RMIS Services:

- Executive "Dashboard"
- Internet Claim reporting via Cinch
- Claim Number Notification
- Real Time Access to Claim Log Notes
- Client Diary System
- Loss Analysis Reports
- PMAcare+ Savings Reports
- Reserve Analysis Reports
- Email Claims Professional Capabilities
- "Schedule My Reports" Feature

Loss Adjustment Expenses:

- Independent Medical Exams
- Medical Bill Review
- Complex Bill Review
- Out-of-Network Bill Review
- Case Management Expenses
- Utilization Review Expenses
- SIF / SITF Recovery
- PPO Network Access Fees
- Private Investigators
- Medicare Section 111 Reporting Fee
- Central Index Bureau /National Insurance Crime Bureau
- Legal Fees / Attorney Fees
- Records Reproduction Fees
- Medicare/Medicaid Conditional Payment Review

Client is responsible for the payment of all Loss Adjustment Expenses including, but not limited to, the above.



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2 TPA & Risk Services for Workers' Compensation - Auto, Property, and General Liability

**Rocky Point UFSD
Flat Fee – LOC (Life of Contract)**

PMA will provide comprehensive LOC (Life of Contract) Third-Party Administration Services for all new claims for the period 7/1/2024 to 7/1/2029 as follows.

		<u>YEAR 1</u>	<u>YEAR 2</u>	<u>YEAR 3</u>	<u>YEAR 4</u>	<u>YEAR 5</u>
LOC - Flat Fee		\$22,590	\$22,590	\$22,590	\$23,270	\$23,970
<u>Included Services</u>						
Claims Handling		Included	Included	Included	Included	Included
Annual Administration Fee		Included	Included	Included	Included	Included
PMA CINCH (\$500 each extra user) / yr (risk management information system)	3 users	Included	Included	Included	Included	Included
Web Imaging / yr, OSHA Log, per year / yr		Included	Included	Included	Included	Included
<u>Unbundled Services</u>						
Cost Containment	% of Savings (\$20,000 per bill cap)	20%	20%	20%	20%	20%
Subrogation Specialist	% of recovery	17%	17%	17%	17%	17%
Case Management	Per hour	\$103	\$103	\$103	\$103	\$103
<u>Optional Services</u>						
PMA Care 24	per call	\$103	\$103	\$103	\$103	\$103
Risk Control	per hour	\$135	\$135	\$135	\$135	\$135
	extensive online library of risk control resources available at no cost to the plan via PMAWebsource					

Pricing is for a 1 year contract with 4 optional extension year(s).

This quote is valid for 90 days from the date of presentment. If the quote is accepted after 90 days, we reserve the right to re-price the account.

For Flat Fee Pricing agreements, if during the term of the contract, any individual occurrence results in more than ten claimants, as determined by PMAMC, then the following additional claims handling fees above and beyond the Annual Flat Fee shall apply: beginning with the 11th claim and for every claim thereafter, \$850 will be charge for each Lost Time Claim; \$125 for each Medical Only Claim; and \$40 for each Record Only Claim.

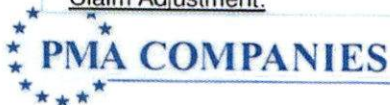


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Exhibit A – Other Services Fee Schedule

All fees are billed as incurred unless specifically agreed otherwise.

Service Type	Amount
Managed Care:	
Bill review and repricing	20% of the total savings (\$20,000 per bill cap)
Utilization review	\$125 per review
Clinical case management services	\$103.00 per hour
Medical consultant review	\$255 per review
PMA Care 24	\$103.00 per call
Point of Sale Pharmacy Program	\$75.00 per review
Medical Director	\$250 per hour
Medicare Solutions:	
Section 111 Reporting	\$9.00 per claim queried
Medicare Set-Aside Allocation	\$2,200 each
CMS Submissions	\$630 each
Medicare Conditional Payment Research	\$130 each
Medicare Conditional Payment Appeal or Dispute	\$260 each
Medicare Conditional Payment Research Final Demand	\$55 each
Medical Cost Projections	\$1900 each
Evidenced Based MSA	\$2,200 each
Life Care Plan	\$185 per hour
Legal Nurse Review	\$1,900 per review
Update (of prior MSA report)	\$785 per report
Resolution Services	\$130 per hour
Medicare/Social Security Verification	\$205 each
Medicaid Conditional Payment Research	\$260 each
Medicare Advantage Plan Conditional Payment Negotiation	\$525 each
Provider Relations Specialist	\$110 per hour
Information Systems:	
RMIS fee	Included per year for up to 3 users
	\$500 per year each add'l user
Customized Reporting/Programming	\$155.00 per hour
Standard Data Feed Set-Up	\$2,500 per year
Standard Data Feed	\$200 per month
Risk Control:	
General	\$135 per hour
Industrial hygiene services	\$180 per hour
Special Projects	To be determined
Claim Adjustment:	



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Vocational Rehabilitation	\$103.00 per hour
Claim Indexing	\$19.75 per claim queried
Other:	
Administrative	Included
Non-standard claim intake	\$18 per claim
Subrogation Specialist Services	17% of gross recovery
Recover to At Work	\$110.00 per hour
Standard Data Extract (upon termination)	\$5,000
OSHA reporting preparation services	\$18 per incident \$1,500 annual minimum
OSHA special projects	To be determined
Each Claim Review in excess of two per year	\$1,500 per review, per day plus PMA expenses
Onsite Claim Review	Travel incurred by PMA personnel is reimbursed in full by the client



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5. TPA & Risk Services for Workers' Compensation, Auto, Property, and General Liability

PMA Funding Options

PMAMC offers ACH direct deposit and expedited payments **at no additional cost to the District**. PMAMC claims loss funding options are outlined below.

Traditional Escrow

With this option, the client will provide PMAMC with an escrow of three months of estimated paid losses and loss adjustment expenses. PMAMC will pay for the claims throughout the month with this account. At the end of the month, PMAMC will bill the client for losses and loss adjustment expenses paid along with the appropriate claims handling fees (if applicable). The client will also receive detailed loss reports showing all claims activity for the month and a cumulative claims summary report by policy/contract.

Direct Funding

With this option, the client will receive a daily, weekly, or monthly electronic communication from Wells Fargo Bank with the total claim checks issued that day, week, or month. On the next business day, Wells Fargo will initiate an ACH transfer to deduct the previous days' (weeks'/months') claims from the client's bank account. Payment is deposited directly into a sub-account, which is unique to the client. At month-end, the client will receive an AMPS billing statement for the loss-handling fees. The client will also receive detailed claims reports showing all activity for the month and a cumulative claims summary report by policy/contract. Reimbursement by check or client-initiated wire transfer/ACH transfer is required for payment of all fees.

PMAMC eBilling Solution

eBilling* is available to PMAMC clients for loss funding and service fees bills. With eBilling you can easily access and view your bills electronically through our secure internet site instead of receiving paper copies through the mail



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6 TPA & Risk Services for Workers' Compensation, Auto, Property, and General Liability



Proposal submitted to:

Rocky Point UFSD

For

Workers' Compensation Third Party Administrator



April 17, 2024

Rocky Point Union Free School District
Purchasing Department
90 Rocky Point-Yaphank Road
Rocky Point NY 11778

Re: Workers' Compensation Third Party Administrator

To Whom It May Concern;

Wright Risk Management, LLC (WRM) is pleased to submit the attached proposal to provide third party workers' compensation administration and related services to Rocky Point Union Free School District

Since our founding in 1978, WRM has specialized in providing third party WC claims administration services to self-insured municipalities and school districts in New York State. Currently, WRM provides claim administration services to over 450 New York State municipalities and public school districts through a variety of risk financing models including group self-insurance, cooperative self-insurance plans and standalone self-insurance programs. We collaborate closely with our clients to develop a comprehensive program with procedures that are customized to meet each district's unique needs.

Our goal as an organization is to provide our clients with the highest level of service, within a price structure that is transparent and all-inclusive. We manage our clients' losses and control expenses by performing all claim administration functions requested within the scope of services internally. Unlike virtually all of our competitors, WRM does not outsource work to a partner or subsidiary, nor do we charge additional fees for basic claim administration services that are fundamental to a comprehensive claim administration program.

We believe that it is important to highlight the savings our flat fee proposal can generate for your WC program. This is most clearly demonstrated in how we process medical bills to reduce your costs. WRM performs all fee schedule bill reviews internally as part of our flat fee agreement. WRM does charge our clients an additional fee to review and reduce bills to the NYS WC Medical Fee schedule. This is a significant difference from our competitors' practices who charge an additional fee for each line of billing submitted with a minimum charge of up to \$8 per bill. This seemingly minor charge can add up to significant fees for the district.


During the 2023 calendar year, WRM reviewed over 144,000 medical bills with charges exceeding \$80.9 million. WRM reduced the amounts payable by over 71%, paying \$23.3 million in medical fees for the year. The reductions to fee schedule were achieved at no additional charge to our clients.

Another area where WRM achieves a savings for our clients is in our selective utilization of nurse case management (NCM). Most of our competitors add significant charges to provide nurse case management services on all files, regardless of the severity of the claim. While this is a service we are able to provide to clients if required, we believe that this is an unnecessary expense in most cases. WRM employs highly experienced claims adjusters, with an average of over 15 years of claims handling experience. Our adjusters have the expertise needed to evaluate the medical and legal aspects of each individual claim. We utilize the services of our internal nurse case manager only when the severity of the claim or complexity of the treatment dictates the need for an additional level of assistance and advocacy for the injured worker. When nurse case management services are warranted, we provide these services for a one-time fee of \$450 for all NCM services throughout the life of the claim, whereas our competitors typically charge a significant hourly fee for extended nurse case management assignments.

In addition to our focused expertise in administering WC programs for NY State self-insured employers, our primary offices, located in Garden City, NY allow us to provide your district with a level of local and personalized service that few competitors can achieve.

We appreciate your consideration of our proposal. Please do not hesitate to contact the undersigned with any questions you may have regarding our organization and this proposal.

Sincerely,
WRIGHT RISK MANAGEMENT, LLC.



Sean Slaven
Vice President, Workers' Compensation

Table of Contents

Tab #	Contents
1	Transmittal Cover Letter
2	Table of Contents
3	PART I – Management and Qualifications <ul style="list-style-type: none">• Proof of Insurance• Details of Management and Key Personnel• References• Contact Details• Vendor Information Details• Certification of Compliance with the Iran Divestment Act.• Statement of Non-Collusion• Related Party Affidavit• Hold Harmless Agreement• Declaration Page
4	PART II – Complete Contract Cost and Pricing Information <ul style="list-style-type: none">• July 1, 2024 – June 30, 2025• July 1, 2025 – June 30, 2026• July 1, 2026 – June 30, 2027• July 1, 2027 – June 30, 2028• July 1, 2028 – June 30, 2029



PART I – Management and Qualifications

A. Name and Title of individual submitting the proposal.

**Sean Slaven, Vice President, Workers' Compensation
Wright Public Entity
900 Stewart Ave, Suite 600
Garden City, NY 11530
Tel: 516-750-9404
Fax: 516-794-5254**

B. Brief description of Proposer's business activities and history.

WRM is a third-party administrator that specializes in providing WC claims administration programs to NY State self-insured public school districts and municipalities. Currently, WRM provides claim administration services to over 450 New York State municipalities and public school districts through a variety of risk financing models including group self-insurance, cooperative self-insurance plans and standalone self-insurance programs.

C. Length of time the Proposer has been in business and length of its experience in providing the services for which the Proposer is submitting a proposal.

Since our founding in 1978, WRM has specialized in providing third party WC claims administration services to self-insured municipalities and school districts in New York State. Our extensive experience, focused solely upon providing claims administration services to NY State public entities, and our primary place of business on Long Island makes us uniquely qualified to provide the customized program and services the district is seeking.

D. Identify the nature of any potential conflict of interest the individual(s) or entity might have in providing the services to the District.

WRM is unaware of any conflict(s) of interest that would limit or prevent our ability to provide the requested services.

E. Provide evidence of required insurance as set forth in Appendix "A"

See Tab 4

F. Provide any other information that might be beneficial to the District.

Our goal as an organization has been to provide our clients with the highest level of service, in a price structure that is transparent and all-inclusive. We manage our clients' losses and control expenses by performing all fundamental claim administration functions internally whenever possible. Where our competitors utilize the medical bill review and vendor assignments to increase their revenues and costs to the clients, WRM does not charge any additional fees for fundamental services that are the foundation of a comprehensive WC program.

WRM has extensive experience and expertise in providing all services described within the Scope of Services outlined in the district's request for proposals. WRM is able to provide all of the services requested within the fees proposed herein with no additional or hidden charges from our organization.

One significant area where WRM outperforms our competitors to reduce our clients claim administration costs is in the area of medical bill review. Unlike our competitors, WRM performs all fee schedule bill reviews at no additional charge to our clients. All medical bills are first reviewed by our highly experienced claims adjusters to verify the treatment is appropriate and causally related to the accident. If approved for payment by the adjuster, the bill is then reviewed by our bill pay specialists who utilize proprietary software to reduce the bill in accordance with the NYS WC Medical Fee Schedule and file the appropriate C8.1/C8.4 forms with the WCB. During the 2023 calendar year, WRM reviewed over 144,000 medical bills with charged fees exceeding \$80.9 million. WRM reduced the amounts payable by over 71%, paying only \$23.3 million in medical fees for the year. These medical bill reductions to fee schedule were achieved at no additional charge to our clients whereas virtually all other administrators will charge and additional fee for each line of billing with a minimum fee (up to \$8 per bill).

Another area where WRM achieves a savings for our clients is in our selective utilization of nurse case management. Most of our competitors add significant charges to provide nurse case managers on all files, regardless of the severity of the injury. While this is a service we are able to provide to clients if requested, we believe that this is an unnecessary expense in most cases. WRM employs highly experienced claims adjusters, with an average of over 15 years of claims handling experience. Our adjusters exercise judgment to assign nurse case management only when the severity or complexity of the claim dictates the need for an additional level of medical management will help to reduce costs while promoting a better outcome on the file. When nurse case management services are warranted, we utilize an internal nurse to provide these services for a flat fee of \$450 for the life of the claim whereas our competitors typically charge significant hourly fees for nurse case management services.

If selected, WRM will work with the district ensure that all services requested within the scope of services are delivered in an effective and cost-effective manner, within the fees as proposed herein.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
12/13/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).


PRODUCER Brown & Brown of Florida, Inc. 300 N Beach Street Daytona Beach FL 32114		CONTACT NAME: Jayna McGraw PHONE (A/C, No. Ext): (386) 238-5757 FAX (A/C, No): (386) 323-9120 E-MAIL: ADDRESS:	
INSURED BROWN & BROWN INC ETAL Po Box 2412 Daytona Beach FL 32115		INSURER(S) AFFORDING COVERAGE	
		INSURER A: Travelers Property Casualty Company of America	NAIC # 25674
		INSURER B: XL Specialty Insurance Company	NAIC # 37885
		INSURER C: The Continental Insurance Company	NAIC # 35289
		INSURER D: The Charter Oak Fire Insurance Company	NAIC # 26815
		INSURER E:	
		INSURER F:	

COVERAGES **CERTIFICATE NUMBER:** 24003 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDITIONAL SUBROGATION WAIVER	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:		TC2J-GLSA-9527B874-TIL-24	01/01/2024	01/01/2025	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 10,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY		TC2J-CAP-9527B862-TIL-24	01/01/2024	01/01/2025	COMBINED SINGLE LIMIT (Ea accident) \$ 2,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
C	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$		60111849420	01/01/2024	01/01/2025	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000
D	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input type="checkbox"/>	N/A	01/01/2024	01/01/2025	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
B	INS AGENTS/BROKERS PROFESSIONAL LIAB E&O		US00106978EQ24A	01/01/2024	01/01/2025	EA WRONGFUL ACT 20,000,000 AGGREGATE 20,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
FOR INFORMATION
NAMED INSURED: WRIGHT RISK MANAGEMENT COMPANY, LLC

CERTIFICATE HOLDER WRIGHT RISK MANAGEMENT COMPANY LLC 900 STEWART AVE SUITE 800 GARDEN CITY NY 11530	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
--	---

AGENCY CUSTOMER ID: _____

LOC #: _____



ADDITIONAL REMARKS SCHEDULE

Page _____ of _____

AGENCY Brown & Brown of Florida, Inc.		NAMED INSURED BROWN & BROWN INC ET AL	
POLICY NUMBER			
CARRIER	NAIC CODE	EFFECTIVE DATE:	

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,
FORM NUMBER: 25 FORM TITLE: Certificate of Liability Insurance: Notes

INSURER A-WORKERS COMPENSATION-POLICY UB-1R881269-24-51-R-EFF 1-1-24 TO 1-1-25, LIMITS 1,000,000/1,000,000/1,000,000 - COVERS AZ, WI, MA

CURRENT BLANKET POLICY FORMS:

GENERAL LIABILITY:

- 1) CG D4 11 04 08 - ADDITIONAL INSURED-DESIGNATED PERSON OR ORGANIZATION
- 2) CG D2 48 04 19 - BLANKET ADDITIONAL INSURED-EXCLUDES PRODUCTS-COMPLETED OPERATIONS
- 3) CG T1 00 02 19 - COMMERCIAL GENERAL LIABILITY COVERAGE FORM (PRIMARY NON-CONTRIBUTORY - OTHER INSURANCE CONDITION)
- 4) CG 24 04 12 18 - WAIVER OF TRANSFER OF RIGHTS OF RECOVERY AGAINST OTHERS TO US (WAIVER OF SUBROGATION)

AUTO LIABILITY:

- 1) CA T3 40 08 08 (WAIVER OF SUBROGATION)

WORKERS COMPENSATION:

- 1) WC 00 03 13 00 01 - WAIVER OF OUR RIGHT TO RECOVER FROM OTHERS ENDORSEMENT

UMBRELLA:

NA 75504XX 03 15 (ADDITIONAL INSURED; PRIMARY & NON-CONTRIBUTORY; WAIVER OF SUBROGATION)

THE UMBRELLA POLICY IS FOLLOW FORM OVER THE GENERAL LIABILITY, AUTO LIABILITY, AND EMPLOYERS LIABILITY.

Rocky Point Union Free School District
Purchasing Department
90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778

DETAILS OF MANAGEMENT AND KEY PERSONNEL

(SUBM IT THIS FORM WITH YOUR PROPOSAL)

Proposers shall provide details, including curriculum vitae, of all personnel who will be engaged in the provision and management of the services required by this RFP. Specifically Proposers shall provide this information in relation to personnel who will be assigned to the District:

- Identity technical knowledge and qualifications of the key personnel who will be responsible for performing each services/task.
- Relevant education and training.
- Length of time with the Proposer's organization.
- Experience (and role) in providing similar services over the past three years

Name	Qualification	Experience
Eric Hartcom, Executive Vice President	Over 35 years of WC claims and program management experience on behalf of carriers and self-insured employers.	Employed by WRM since 2010, overseeing department handling NYS WC self-insured programs, including group self-insureds, cooperative and standalone employers.
Sean Slaven, Vice President, WC Claims	Over 35 years of WC claims and program management experience on behalf of carriers and self-insured employers	Employed by WRM since 2012 handling NYS WC self-insured programs, including cooperative and standalone employers.
Jamie Constantine, WC Claims Supervisor	18 years of medical billing and WC claims handling/supervisory experience, specializing in self-insured	Employed by WRM since 2013 handling NYS WC self-insured programs, including cooperative and standalone employers
Lost time Claim Adjuster Medical Only Claim Adjuster PPD Claims Adjuster	WRM will assign dedicated claims adjusters to investigate and manage claims based upon severity including lost time, notate/medical only and PPD claims.	WRM adjusters average over 15 years of claims handling experience.

You may attached a separate sheet, if needed.

Proposer's Name: Wright Risk Management

Rocky Point Union Free School District
Purchasing Department
90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778

REFERENCES:

(Submit this form with your RFP)

Proposers must include with their proposal, a minimum of three (3) references where the Proposer provides similar services to the services described herein. References must include contact names and telephone numbers. Proposers must also demonstrate that the firm or at least one principal in the firm has been providing the necessary services for a minimum of three (3) years. Failure to include this information with your proposal may result in the RFP's rejection.

<u>Reference (Name & Company)</u>	<u>Telephone Number</u>
1. <u>Anthony Cedrone, President, Nassau Schools WC Cooperative</u>	<u>(516) 679-6308</u>
2. <u>Chris Prill, President, Dutchess County Schools WC Cooperative</u>	<u>(845) 877-5700 ext. 1281</u>
3. <u>Jerel Cokley, Oceanside UFSD, Assistant Superintendent, Business</u>	<u>(516) 678-1209</u>
4. _____	_____
5. _____	_____

Proposer's Name: Wright Risk Management

Rocky Point Union Free School District
Purchasing Department
90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778

Contact Details

1. **Company name:** Wright Risk Management
2. **Address:** 900 Stewart Avenue, Suite 600, Garden City NY 11530
3. **Telephone number:** 516-227-2300
4. **Fax number:** 516-794-5254
5. **Contact person:** Sean Slaven, Vice President, Workers' Compensation
6. **Position in Company:** Vice President, Workers' Compensation
7. **Email address:**
8. **Website (if applicable):** <https://wrihtrisk.com/>
9. **Number of employees** **Full time:** 57 **Part Time:** 0

Proposer's Name: Wright Risk Management

Rocky Point Union Free School District
Purchasing Department
90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778

VENDOR INFORMATION SHEET

VENDOR NAME: Wright Risk Management, LLC.

ADDRESS: 900 Stewart Avenue, Suite 600, Garden City NY 11530

CONTACT: Sean Slaven

TELEPHONE: 516-750-9404 FAX: 516-794-5254

EMAIL: _____

TYPE OF ENTITY: CORP. _____ PARTNERSHIP _____ INDIVIDUAL _____ LLC X

FEDERAL EMPLOYEE ID#: 26-290 3226 OR SOCIAL SECURITY#: _____

DATE OF ORGANIZATION: _____

If a non-publicly owned Corporation:

CORPORATION NAME: _____

LIST PRINCIPAL STOCKHOLDERS: (5% of outstanding shares)

LIST OFFICERS AND DIRECTORS:

NAME	TITLE
_____	_____
_____	_____
_____	_____

If a partnership:

PARTNERSHIP NAME: _____

LIST PARTNERS NAMES:

Proposer's Name: Wright Risk Management

Rocky Point Union Free School District
Purchasing Department
90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778

CERTIFICATION OF COMPLIANCE WITH THE IRAN DIVESTMENT ACT

As a result of the Iran Divestment Act of 2012 (the "Act"), chapter 1 of the 2012 Laws of New York, a new provision has been added to Stat Finance Law (SFL) § 165-a and New York General Municipal Law § 103-g, both effective April 12, 2012. Under the Act, the Commissioner of the Office of General Services (OGS) will be developing a list of "persons" who are engaged in "investment activities in Iran" (both are defined terms in the law) (the "Prohibited Entities List"). Pursuant to SFL § 165-a(3)(b), the initial list is expected to be issued no later than 120 days after the Act's effective date at which time it will be posted on the OGS website.

By submitting a bid in response to this solicitation or by assuming the responsibility of a Contract awarded hereunder, each Bidder/Contractor, any person signing on behalf of any Bidder/Contractor and any assignee or subcontractor and, in the case of a joint bid, each party thereto, certifies, under penalty of perjury, that once the Prohibited Entities List is posted on the OGS website, that to the best of its knowledge and belief, that each Bidder/Contractor and any subcontractor or assignee is not identified on the Prohibited Entities List created pursuant to SFL §165-a(3)(b).

Additionally, Bidder/Contractor is advised that once the Prohibited Entities List is posted on the OGS Website, any Bidder/Contractor seeking to renew or extend a Contract or assume the responsibility of a Contract awarded in response to this solicitation must certify at the time the Contract is renewed, extended or assigned that it is not included on the Prohibited Entities List.

During the term of the Contract, should the School District receive information that a Bidder/Contractor is in violation of the above-referenced certification, the School District will offer the person or entity an opportunity to respond. If the person or entity fails to demonstrate that he/she/it has ceased engagement in the investment which is in violation of the Act within 90 days after the determination of such violation, then the School District shall take such action as may be appropriate including, but not limited to, imposing sanctions, seeking compliance, recovering damages or declaring the Bidder/Contractor in default. The School District reserves the right to reject any bid or request for assignment for a Bidder/Contractor that appears on the Prohibited Entities List prior to the award of a contract and to pursue a responsibility review with respect to any Bidder/Contractor that is awarded a contract and subsequently appears on the Prohibited Entities List.

I, Sean Slaven, being duly sworn, deposes and says that he/she is the
Vice President, Workers' Compensation of the Wright Risk Management, LLC
Corporation

and that neither the Bidder/Contractor nor any proposed subcontractor is identified on the Prohibited Entities List.

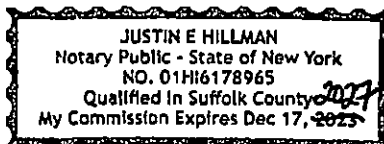
SIGNED 

SWORN to before me this

16 day of April, 2024

Notary Public: 

Proposer's Name: Wright Risk Management



Rocky Point Union Free School District
Purchasing Department
90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778

STATEMENT OF NON-COLLUSION

For the purpose of this Statement of Non-collusion, the use of the words bid or bidder are interchangeable and synonymous with the words proposal and proposer.

By submission of this bid/proposal, the vendor certifies that he is complying with section 103-D of the General Municipal Law. Section 103-D of the General Municipal Law reads as follows:

103-D. Statement of non-collusion in bids and proposals to political subdivisions of the state. Every bid or proposal hereafter made to a political subdivision of the state of any public department, agency, or official thereof where competitive bidding is required by statute, rule, regulation of local law, for work or services performed, to be performed, or goods sold or to be sold, shall contain the following statement subscribed by the bidder and affirmed by such bidder as true under the penalties of perjury: non-collusive bidding certification.

- (a) By submission of this bid, each bidder and each person signing on behalf of any bidder certifies, and in the case of a joint bid, each party thereto certifies as to its own organization, under penalty of perjury, that to the best knowledge and belief:
- (1) The prices in this bid have been arrived at independently without collusion, consultation, communication, or agreement for the purpose or restricting competition, as to any matter relating to such prices with any other bidder or with any competition;
 - (2) Unless otherwise required by law, the prices which have been quoted in this bid have not been knowingly disclosed by the bidder and will not knowingly be disclosed by the bidder prior to opening, directly or indirectly, to any other bidder or to any competition; and
 - (3) No attempt has been made or will be made by the bidder to induce any other person, partnership or corporation to submit or not to submit a bid for the purpose of restricting competition.
- (b) A bid shall not be considered for award nor shall any award be made where (a) (1), (2), and (3) above have not been complied with; provided, however that if in any case the bidder cannot make foregoing certification, the bidder shall so state and furnish with the bid a signed statement which sets forth in detail the reasons therefore. Where (a) (1), (2), and (3) above have not been complied with, the bid shall not be considered for award, nor shall any award be made unless the head of the purchasing unit of the political subdivision, public department, agency or official subdivision, public department, agency or official thereof to which the bid is made, or his designee, determines that such disclosure was not made for the purpose of restricting competition.

The fact that the bidder (a) has published price lists, rates, or tariffs covering items being procured, (b) has informed prospective customers of proposed or pending publication of new or revised price lists for such items, or (c) has sold the same items to other customers at the same prices being bid, does not constitute, without more, a disclosure within the meaning subparagraph one (a).

Any bid thereafter made to any political subdivision of the state or any public department, agency or official thereof by a corporate bidder for work or services performed or to be performed, or goods sold or to be sold, where competitive bidding is required by statute, rule, regulation or local law, and where such bid contains the certification referred to in subdivision one of the section, shall be deemed to have been authorized by the board of directors of the bidder, and such authorization shall be deemed to include the signing and submission of the bids and the inclusion therein of the certificate as to non-collusion as the act and deed of the corporation.

Wright Risk Management

Print or Type Firm Name

Authorized Signature

Sean Slaven

Print or Type Name

Date

Vice President

Print or Type Title

Proposer's Name: Wright Risk Management

Rocky Point Union Free School District
Purchasing Department
90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778

RELATED PARTY AFFIDAVIT

STATE OF New York COUNTY OF Suffolk; Sean Slaven being duly sworn, deposes and says:

1. That (s) he is an officer or representative of Wright Risk Management and that (s) he has the authority to sign this affidavit.
2. This affidavit is offered as an inducement to Rocky Point Union Free School District to award to Wright Risk Management. Such purchase contracts for goods or services as directed by the Board of Education, in accordance with New York State law and with Rocky Point Union Free School District policy.
3. That no Officer, Employee or Stockholder of the above-referenced Vendor is an Employee, in any position, at Rocky Point Union Free School District.
4. That no Officer, Employee or Stockholder of the above-referenced vendor is related to an employee in any position, administrator or Board Member, at the Rocky Point School District at 90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778 other than as disclosed below:

Vendor: List Officer, Employee or Stockholder's Name	Position with Vendor	Employee, Administrator or Board Member Name	Relationship between parties

Signed [Signature] Date 4/17/29

Seal of the Corporation (If Available)

Sworn to before me this Sean Slaven
Day of 17th day of April 2029

[Signature]
Notary Public Signature
SEAL

FRANCES DIMAIO
Notary Public - State of New York
No. 01D14943829
Qualified in Queens County
My Commission Expires November 07, 2026

Proposer's Name: Wright Risk Management

Rocky Point Union Free School District
Purchasing Department
90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778

HOLD HARMLESS AGREEMENT

This form must be signed and notarized and submitted with this proposal.


It is hereby agreed and understood that the bidder agrees to hold harmless and indemnify the Rocky Point Union Free School District and its board of education and, any officer, agent, servant or employee of the Rocky Point Union Free School District, from any lawsuit, action, proceeding, liability, judgment, claim, or demand which may arise out of:

- A. Any injury (including death) to person or property sustained by the bidder, its agents, servants or employees or any person, firm, or corporation employed directly or indirectly by them upon or in connection with their performance under the contract however caused;
- B. Any injury (including death) to person or property sustained by any person, firm, or corporation, caused by any act, default, error, or omission of the consultant, its agents, servants, or employees or any person, firm or corporation, directly or indirectly employed by them upon or in connection with performance under the contract.

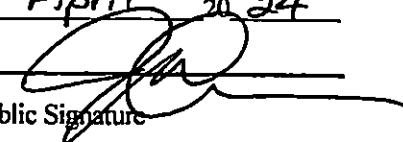
The assumption or indemnity, liability and loss hereunder shall survive consultant's completion of service or other performance hereunder and any termination of this contract.

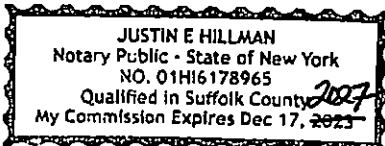
The consultant at its own expense and risk shall defend any such legal proceedings that may be brought against the Rocky Point Union Free School District, its board of education, or any officer, agent, servant, or employee of the Rocky Point Union Free School District on any claim or demand, and shall satisfy any judgment that may be rendered against the Rocky Point Union Free School District, its board of education, or any officer, agent, servant, or employee of Rocky Point Union Free School District.

This indemnification, defense and hold harmless agreement shall apply to any lawsuit, action, proceeding, liability, judgment, claim or demand of name or nature, notwithstanding that consultant may deem the same to be frivolous or without merit. It is intended that this agreement be interpreted in the broadest manner possible so as to insulate all of the entities, parties and individuals named above from any liability, cost or judgment, monetary or otherwise, as the same may relate to the personnel and services provided by the consultant.

Signed  Date 4/16/24
Seal of the Corporation (If Available)

Sworn to before me this 16
Day of April 2024


Notary Public Signature

SEAL: 

Proposer's Name: Wright Risk Management

Rocky Point Union Free School District
Purchasing Department
90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778

DECLARATION PAGE

NAME OF FIRM: Wright Risk Management

ADDRESS: 900 Stewart Avenue, Suite 600,

Garden City NY 11530

FEDERAL / TAX IDENTIFICATION NUMBER: 26-2903226

The above-mentioned bidder declares and certifies:

1. That the said bidder is of lawful age and the only one interested in this bid, and that no one other than said bidder has any interest herein.
2. That this bid is made without previous understanding, agreement or connection with any other person, firm or corporation making a bid for the same purpose, and is in all respects fair and without collusion of fraud.
3. That no member of the Board of Education of the Rocky Point Union Free School District nor any officer or employee or person whose salary is payable in whole or in part from the treasure of said Board of Education is directly or indirectly interested in this bid or in the supplies, materials, equipment, work or services to which it is related, or in any portion of the profits thereof.
4. That said bidder has carefully examined and understands each and every requirement contained within this Bid document, and that all addenda to this Bid, if any, are part of the Bid and shall, if successful in this bid, furnish and deliver at the prices bid and within the time stated, all the materials, supplies, apparatus, goods, wares, merchandise, service or labor for which this proposal is made.
5. That in the event of the failure of said bidder to perform within the time stated in the bid specifications or on the purchase order as the case may be, the undersigned agrees to pay the Board, on demand, the difference between the price(s) bid and the price(s) for which such item(s) or service(s) shall be subsequently purchased.

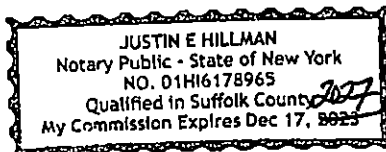
Signed [Signature] Date 4/16/24 SEAL OF CORPORATION

Sworn to before me this 16

Day of April, 2024

Notary Public Signature [Signature]
SEAL

Proposer's Name _____



16

Proposer's Name: Wright Risk Management

Rocky Point Union Free School District
Purchasing Department
90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778

QUOTE SHEET

July 1, 2024 to June 30, 2025

Name of Proposer **Wright Risk Management**

Contact Name and Title **Sean Slaven, Vice President, Workers' Compensation**

Address **900 Stewart Avenue, Suite 600, Garden City NY 11530**

Telephone# **516-750-9404** Fax# **516-794-5254**

Email Address

Type(s) of service and rate information for each type of service that would be included in a potential agreement with the District (or attach rate sheet):

Type of Service: Rate Information: per ___

**Comprehensive WC Claim Administration
Services in accordance with scope of services.** \$20,000 **Contract Year**

Type of Service: Rate Information: per ___

**In-house Nurse Case Management Services
Only assigned when appropriate (surgeries,
complex injury/treatment issues, etc.).** \$450 **One-time fee per
claim assigned.**

Type of Service: Rate Information: per ___

Type of Service: Rate Information: per ___

Type of Service: Rate Information: per ___

Type of Service: Rate Information: per ___

Proposer's Name: **Wright Risk Management**

Rocky Point Union Free School District
Purchasing Department
90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778

QUOTE SHEET

July 1, 2025 to June 30, 2026

Name of Proposer **Wright Risk Management**

Contact Name and Title **Sean Slaven, Vice President, Workers' Compensation**

Address **900 Stewart Avenue, Suite 600, Garden City NY 11530**

Telephone # **516-750-9404** Fax# **516-794-5254**

Email Address _____

Type(s) of service and rate information for each type of service that would be included in a potential agreement with the District (or attach rate sheet):

Type of Service:	Rate Information:	Per
Comprehensive WC Claim Administration Services in accordance with scope of services.	\$20,400	Contract year

Type of Service:	Rate Information:	per ____
In-house Nurse Case Management Services Only assigned when appropriate (surgeries, complex injury/treatment issues, etc.).	\$450	One-time fee per claim assigned

Type of Service:	Rate Information:	per ____
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Type of Service:	Rate Information:	per ____
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Type of Service:	Rate Information:	per ____
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Type of Service:	Rate Information:	per ____
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Type of Service:	Rate Information:	per ____
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Proposer's Name: **Wright Risk Management**

Rocky Point Union Free School District
Purchasing Department
90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778

QUOTESHEET

July 1, 2026 to June 30, 2027

Name of Proposer Wright Risk Management

Contact Name and Title Sean Slaven, Vice President, Workers' Compensation

Address 900 Stewart Avenue, Suite 600, Garden City NY 11530

Telephone # 516-750-9404 Fax# 516-794-5254

Email Address

Type(s) of service and rate information for each type of service that would be included in a potential agreement with the District (or attach rate sheet):

Type of Service: Comprehensive WC Claim Administration Services in accordance with scope of services.	Rate Information: \$20,800	per ____ Contract year
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Type of Service: In-house Nurse Case Management Services Only assigned when appropriate (surgeries, complex injury/treatment issues, etc.).	Rate Information: \$450	per ____ One-time fee per claim assigned
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Type of Service:	Rate Information:	per ____
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Type of Service:	Rate Information:	per ____
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Type of Service:	Rate Information:	per ____
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Type of Service:	Rate Information:	per ____
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Type of Service:	Rate Information:	per ____
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Proposer's Name: Wright Risk Management

Rocky Point Union Free School District
Purchasing Department
90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778

QUOTE SHEET

July 1, 2027 to June 30, 2028

Name of Proposer Wright Risk Management

Contact Name and Title Sean Slaven, Vice President, Workers' Compensation

Address 900 Stewart Avenue, Suite 600, Garden City NY 11530

Telephone # 516-750-9404 Fax# 516-794-5254

Email Address

Type(s) of service and rate information for each type of service that would be included in a potential agreement with the District (or attach rate sheet):

Type of Service:	Rate Information:	per ___
Comprehensive WC Claim Administration Services in accordance with scope of services	\$21,200	Contract year

Type of Service:	Rate Information:	per
In-house Nurse Case Management Services Only assigned when appropriate (surgeries, complex injury/treatment issues, etc.).	\$450	One-time fee per claim assigned,

Type of Service:	Rate Information:	per ___
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Type of Service:	Rate Information:	per ___
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Type of Service:	Rate Information:	per ___
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Type of Service:	Rate Information:	per ___
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Type of Service:	Rate Information:	per ___
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Type of Service:	Rate Information:	per ___
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Proposer's Name: Wright Risk Management

Rocky Point Union Free School District
Purchasing Department
90 Rocky Point-Yaphank Rd., Rocky Point, NY 11778
QUOTE SHEET

July 1, 2028 to June 30, 2029

Name of Proposer Wright Risk Management

Contact Name and Title Sean Slaven, Vice President, Workers' Compensation

Address 900 Stewart Avenue, Suite 600, Garden City NY 11530

Telephone # 516-750-9404 Fax# 516-794-5254

Email Address _____

Type(s) of service and rate information for each type of service that would be included in a potential agreement with the District (or attach rate sheet):

Type of Service:	Rate Information:	per ____
Comprehensive WC Claim Administration Services in accordance with scope of services	\$21,600	Contract year

Type of Service:	Rate Information:	per ____
In-house Nurse Case Management Services Only assigned when appropriate (surgeries, complex injury/treatment issues, etc.).	\$450	One-time fee per claim assigned

Type of Service:	Rate Information:	per ____
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Type of Service:	Rate Information:	per ____
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Type of Service:	Rate Information:	per ____
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Type of Service:	Rate Information:	per ____
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Type of Service:	Rate Information:	per ____
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Type of Service: _____	Rate Information:	per ____
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Proposer's Name: Wright Risk Management



MS810de

LEXMARK



MS2100

LEXMARK

⏪	⏩	
1st	2nd	3rd
4th	5th	6th
7th	8th	9th
⏴	⏵	⏶
		⏸



MS810de



Control panel buttons:

- Home button (house icon)
- Power button (moon icon)
- 1 OK
- 2 ABC
- 3 DEF
- 4 GHI
- 5 JKL
- 6 MNO
- 7 PQRS
- 8 TUV
- 9 WXYZ
- Left arrow button
- 0 ERG
- #
- Red X button

LEXMARK







Rocky Point Union Free School District

**Annual Risk Assessment Update
Pertaining to the Internal Controls
of District Operations**

December 2023

**INDEPENDENT ACCOUNTANTS' REPORT
ON APPLYING AGREED UPON PROCEDURES**

The Board of Education
Rocky Point Union Free School District

We have performed the procedures enumerated below, which were agreed to by the Rocky Point Union Free School District (the "District"), solely to assist the District. This agreed upon procedures engagement was performed in accordance with standards established by the American Institute of Certified Public Accountants. The sufficiency of these procedures is solely the responsibility of the specified users of the report. Consequently, we make no representation regarding the sufficiency of the procedures described below either for the purpose for which this report has been requested or for any other purpose.

We have updated our December 2022 Risk Assessment by performing certain internal audit procedures pertaining to the time period starting January 1, 2023 through December 31, 2023. The updated Risk Assessment and related internal audit plan concentrates on the following key internal control areas:

- Governance and Planning
- Budget Development
- Accounting and Reporting
- Revenue and Cash Management
- Grants
- Payroll
- Human Resources
- Benefits
- Purchasing and Related Expenditures
- Facilities Maintenance
- Capital Projects
- Fixed Assets
- Food Service
- Extraclassroom Activity Fund
- Information Systems
- Cyber Security
- Student Data Management
- Pupil Personnel Services
- Transportation
- Security and Safety
- Insurance / Risk Management

Our engagement is limited in scope and will be confined to our agreed-upon procedures. We will not be conducting an audit or review of the district's financial statements and therefore we will not express an opinion or any other form of assurance on them.

At the end of our engagement, we will present the results of applying the agreed-upon procedures in the form of our findings in a report. Our accountants' report should be used only for the intent of the original users of this report and will include a statement indicating that had we performed additional procedures, other matters might have come to our attention that would have been reported to you. As such, using this report for anything other than the original intent of the agreed-upon procedures could mislead the readers. You must notify us immediately if the original users of the report change.

Very truly yours,

Nawrocki Smith LLP
January 31, 2024



Rocky Point Union Free School District

**Annual Risk Assessment Update
Pertaining to the Internal Controls
of District Operations**

December 2023

Table of Contents

Risk Assessment Overview.....	2
Internal Audit Objectives.....	2
Scope and Methodology.....	3
Internal Audit Risk Assessment Update Summary	4
Risk Rating and Internal Audit Plan	5
Risk Assessment Observations and Recommendations.....	8

Rocky Point Union Free School District
Annual Risk Assessment
December 2023

RISK ASSESSMENT OVERVIEW

This Risk Assessment report provides a presentation of our view of the school district's risk pertaining to its financial operations. It gives the District's administration the information necessary to help optimize its overall performance. The report identifies, expresses, and prioritizes the key program risks so that the District's administration can focus on those areas most critical to its success. This analysis is used to define the District's risk profile. It will provide an overview of the risks facing the District's operations.

In accordance with the laws of New York, 2005, Chapter 263, all school districts and BOCES were required to establish an internal audit function no later than July 1, 2006 and be in operation no later than December 31, 2006. This function should include, at a minimum, development of a risk assessment of district operations, including but not limited to:

- A review of financial policies, procedures, and practices.
- An annual review and update of such risk assessment.
- Annual testing and evaluation of one or more areas of the District's internal controls.
- Preparation of reports which analyze significant risk assessment findings.
- Recommended changes for strengthening controls and reducing identified risk; and specifying time frames for implementation of such recommendations.

Pursuant to Section 170.12 – Regulations of the Commissioner of Education – School District Financial Accountability, each school district must prepare a corrective action plan, approved by the Board of Education in response to findings to final reports issued by the internal auditor. This plan should include expected dates of implementation and should be filed with the New York State Education Department.

INTERNAL AUDIT OBJECTIVES

The objectives of our engagement are as follows:

- Develop an understanding of the critical business processes of the District within each functional area.
- Identify and qualify risks based on the understanding of the business processes and stated business rules.
- Identify stated controls that are currently in place to address those risks and ascertain if they are operating effectively.
- Recommend improvements in internal controls.

Rocky Point Union Free School District
Annual Risk Assessment
December 2023

SCOPE AND METHODOLOGY

The Board of Education has engaged Nawrocki Smith as the District's internal auditor. In compliance with New York State Laws, we have performed an annual update to the District risk assessment with respect to policies, procedures, and internal controls pertaining to District operations. The procedures applicable to the annual update of the District's risk assessment were performed during the fiscal year ending December 2022 and were carried out in order to determine an internal audit plan for 2023 and thereafter. This risk assessment will be updated annually to reflect any changes in the current control environment and the existing internal audit plan.

Our risk assessment consisted of the following methodology:

- Perform interviews of Administration and other appropriate personnel.
- Document procedures within key functional areas.
- Identify key controls and perform audit tests of those controls.
- Assess effectiveness of the key controls.
- Identification and review of organization structure.
- Analysis of risks that are a threat to the achievement of objectives.
- Create a risk profile and internal audit plan.

In addition to the above procedures, we have also evaluated and considered the following within our overall risk assessment:

- District policies and procedures.
- Recent focus of State Comptroller audits.
- Board of Education/Audit Committee meetings.
- Materiality to financial statements.
- Changes in management or key personnel.
- Financial reports provided to the Board.
- External auditor management letters.
- District corrective action plans.
- Organizational chart and job descriptions.

Rocky Point Union Free School District
Annual Risk Assessment
December 2023

INTERNAL AUDIT RISK ASSESSMENT UPDATE SUMMARY

We have analyzed twenty-one (21) business process areas within the District and have developed an internal audit plan based upon our assessment of each area. Each of the twenty-one (21) business processes contains multiple categories for which an extensive cycle analysis will be performed during the proposed time period noted within the risk rating and internal audit plan. The plan as presented will be revised each year based upon the annual risk assessment update and events/requests that occur during the year which impact the priority of future internal audit services.

The results of our initial risk assessment are summarized below and, in the tables, presented on pages 5 through 7. We have utilized a “Low,” “Moderate,” and “High” control risk rating assessment scale of the organization.

<u>CURRENT YEAR RATINGS</u>			<u>CHANGE FROM PRIOR YEAR</u>		
<u>Rating</u>	<u>Count</u>		<u>Category (*)</u>	<u>Count</u>	
High	1	1.09%	“High” to “Low”	-	0.00%
Moderate	6	6.52%	“High” to “Moderate”	-	0.00%
Low	84	91.30%	“Moderate” to “Low”	-	0.00%
N/A	1	1.09%	“Low” to “Moderate”	2	100.00%
Total	92	100.00%	“N/A” to “Low”	-	0.00%
			Total	2	100.00%

Our December 2023 risk assessment update contains four (4) recommendation, as follows:

<u>Business Process</u>	<u>Recommendation(s)</u>
Safety & Security	4
Total	4

The District has completed or taken action on the one (1) prior risk assessment report recommendation as follows:

<u>Recommendations</u>	<u>Complete</u>	<u>In-Process</u>	<u>Not Started</u>	<u>Total</u>
	1	-	-	1

We have summarized below areas we recommend the District consider for the selection of one (1) intensive cycle analyses to be performed during the fiscal year 2023/2024:

<u>Cycle Reviews:</u>	<u>Other 2023/2024 Planned Internal Audit Services:</u>	
Food Service	<ul style="list-style-type: none"> • Safety & Security Cycle Recommendations Follow-Up • External Audit Corrective Action Plan Monitoring 	<ul style="list-style-type: none"> • Annual Risk Assessment Update as of December 2024 • Other Internal Audit Services at the Request of the District/BOE

Rocky Point Union Free School District
Annual Risk Assessment
December 2023

Risk Rating and Internal Audit Plan

√ = Internal Audit Services Provided
★ = Business Cycle Review Complete

X = Proposed Business Cycle Review
T = Proposed Key Control Testing

	Business Process	Business Process Categories	RISK			YEAR OF SERVICE		
			Inherent	Control		Prior	23-24	Subsequent
				21-22	22-23			
1	Governance and Planning	1 Governance Environment	H	L	L	√		X
		2 Control Environment / Policies & Proc.	H	L	L	√		X
2	Budget Development	3 Budget Development	H	L	L			X
		4 Budget Monitoring & Reporting	H	L	L	√		X
3	Accounting & Reporting	5 Financial Accounting and Reporting	H	L	L	√		X
		6 External/Internal/Claims Auditing	H	L	L	√		X
		7 Fund Balance Management	H	L	L	√		X
4	Revenue and Cash Management	8 Real Property Tax	M	L	L	★		
		9 State Aid	H	L	L	★		
		10 Out of District Tuition/Reimb. Exp.	M	L	L	★		
		11 Use of Facilities	L	L	L	★		
		12 Donations	M	L	L	★		
		13 Vending Machines	H	L	L	★		
		14 Cash Receipts	H	L	L	★		
		15 Cash & Investment Management	H	L	L	★		
		16 Petty Cash	L	L	L	★		
		17 Bank Reconciliations	H	L	L	★		
		18 Online Banking	H	L	L	★		
19 Accounts Receivable	H	L	L	★				
5	Grants	20 General Processing	H	L	L	★		
		21 Grant Application	M	L	L	★		
		22 Allowable Costs & Expenditures	H	L	L	★		
		23 Monitoring	M	L	L	★		
		24 Reporting	H	L	L	★		
6	Payroll	25 Payroll Disbursements	H	L	L	★		
		26 Overtime Reporting	H	L	L	★		
		27 Payroll Accounting & Reporting	H	L	L	★		
		28 Payroll Tax Filings	H	L	L	★		
		29 Payroll Reconciliation	H	L	L	★		
7	Human Resources	30 Employment Requisition/Hiring	H	L	L	★		
		31 Personnel Evaluation	H	L	L	★		
		32 Termination	H	L	L	★		
		33 Employee Attendance	H	L	L	★		

Rocky Point Union Free School District
Annual Risk Assessment
December 2023

Risk Rating and Internal Audit Plan (Continued)

√ = Internal Audit Services Provided	X = Proposed Business Cycle Review
★ = Business Cycle Review Complete	T = Proposed Key Control Testing

	Business Process	Business Process Categories	RISK		YEAR OF SERVICE			
			Inherent	Control		Prior	23-24	Subsequent
				21-22	22-23			
8	Benefits	34 Eligibility	H	L	L	★		
		35 Benefit Calculations	H	L	L	★		
		36 Patient Protection & Affordable Care Act	H	L	L			
		37 Retiree Benefits	H	L	L	★		
		38 ERS/TRS	H	L	L			
9	Purchasing and Related Expenditures	39 PO System & Vendor Database	H	L	L	★		
		40 Purchasing Process	H	L	L	★		
		41 Payment Processing	H	L	L	★		
		42 Employee Reimbursements	H	L	L	★		
		43 Credit Cards	H	L	L	★		
10	Facilities Maintenance	44 Facilities Maintenance/Work Orders	H	L	L	★		
		45 Staff Supervision	M	L	L			
		46 Preventive Maintenance	M	L	L			
		47 Coordination with Outside Vendors	M	L	L			
11	Capital Projects	48 Construction Planning & Monitoring	M	L	L	★		
		49 Capital Project Funding & Payments	M	L	L	★		
		50 Recordkeeping & Reporting	H	L	L	★		
12	Fixed Assets	51 Inventory/ Capitalization Policy	H	L	L			X
		52 Acquisition and Disposal	H	L	L	√		X
		53 Inventory Process & Recordkeeping	H	L	L			X
13	Food Service	54 Sales Cycle and System	M	L	L	★	X	
		55 Inventory and Purchasing	M	M	M	★	X	
		56 Free & Reduced Meals	M	L	L	★	X	
		57 Federal and State Reimbursement	H	L	L	★	X	
		58 Financial Reporting & Monitoring	M	L	L	★	X	
14	Extraclassroom Activity Fund	59 General Controls	H	L	L	★		
		60 Revenue	H	L	L	★		
		61 Expenditures	M	L	L	★		
		62 Reporting	M	L	L	★		

Rocky Point Union Free School District
Annual Risk Assessment
December 2023

Risk Rating and Internal Audit Plan (Continued)

√ = Internal Audit Services Provided	X = Proposed Business Cycle Review
★ = Business Cycle Review Complete	T = Proposed Key Control Testing

	Business Process	Business Process Categories	RISK			YEAR OF SERVICE		
			Inherent	Control		Prior	23-24	Subsequent
				21-22	22-23			
15	Information System	63 Governance	H	L	L	★		
		64 Inventory	H	L	L	★		
		65 Network Security	H	L	L	★		
		66 Application Security	H	L	L	★		
		67 Physical Security	H	L	L	★		
		68 Disaster Recovery	H	L	L	★		
16	Cybersecurity	69 General Controls	H	L	L	★		
		70 Information & Asset Security	H	M	M	★		
		71 Vulnerability Assessment	H	M	M	★		
		72 Incident Response & Recovery	H	L	L	★		
17	Student Data Management	73 Registration & Enrolment	H	L	L	★		
		74 Student Attendance	H	L	L	★		
		75 Student Performance	H	L	L	★		
		76 Student Eligibility	H	L	L			
18	Pupil Personnel Services	77 Budgeting and Planning	M	L	L	★		
		78 STAC Reimbursement	M	M	M	★		
		79 Medicaid Reimbursement	M	H	H	★		
		80 RFP and Contracts	H	L	L	★		
19	Transportation	81 Fleet Inventory and Maintenance	H	N/A	N/A			
		82 Bus Routing and Planning	H	L	L	★		
		83 Labor and Supervision	H	L	L	★		
		84 Contract Management	H	L	L	★		
		85 Federal and State Reimbursement	H	L	L	★		
20	Safety & Security	86 Plan Development & Strategy	H	L	M	★		
		87 Building Access & Security System	H	L	M	★		
		88 Compliance and Incident Reporting	H	L	L	★		
		89 Safety & Security Monitoring	H	L	L	★		
21	Insurance / Risk Management	90 General	H	L	L			X
		91 Policy Management	H	L	L			X
		92 Claims Reporting	H	L	L			X

Rocky Point Union Free School District
Annual Risk Assessment
December 2023

Inherent Risk - Inherent risk pertains to the overall school district industry. Inherent risk is the risk of a material misstatement may occur assuming the absence of internal controls.

Control Risk - Control risk pertains specifically to the Three Village Central School District. Control risk is the risk that a material misstatement will not be detected and corrected by Management's internal controls on a timely basis.

RISK ASSESSMENT OBSERVATIONS AND RECOMMENDATIONS

Current Year Observations and Recommendations

Safety & Security

1. We noted that the District-wide Safety Plan did not contain the following elements required by NYS Education Law §2801-a and NYSED Regulations of the Commissioner §155.17:
 - Procedures for contacting parents in the event of a violent incident or early dismissal.
 - Procedures for contacting parents in the event of an implied or direct threat of violence by a student against themselves.
 - Procedures for the dissemination of informative materials regarding the early detection of potentially violent behaviors.
 - Strategies to improve communication amount students and staff and reporting of potentially violent incidents.
 - Description of the hiring and training process of security guards.

➤ *We recommend that the District review and update the District-wide Safety Plan to include the elements noted above to ensure the plan is in compliance with NYS Education Law §2801-a and NYSED Regulations of the Commissioner §155.17.*

2. We noted that the Building Safety Plans did not contain the following elements required by NYS Education Law §2801-a and NYSED Regulations of the Commissioner §155.17:
 - Procedures for coordination of the plan with the statewide plan for disaster mental health services.
 - Procedures for an annual review of the plan and conduct of drills to test components of the plan.

➤ *We recommend that the District review and update the Building Safety Plans to include the elements noted above to ensure the plan is in compliance with NYS Education Law §2801-a and NYSED Regulations of the Commissioner §155.17.*

3. We noted two hundred eighteen (218) badges were issued to inactive employees. In addition, we noted that seven (7) employees were issued two (2) badges.

➤ *We recommend that the District deactivate the badges for the individuals identified who are no longer active employees. In addition, we recommend that the District implement a procedure to review the badge access listing to ensure only active employees have active badges.*

4. We noted that classroom doors were open when classes were in session and empty classroom doors were unlocked at the High School, Middle School, and Frank J. Carasiti Elementary School.

Rocky Point Union Free School District
Annual Risk Assessment
December 2023

- *We recommend that the District review procedures with staff to ensure that classroom doors are closed when class is in session or locked when not in use.*

Status of Prior Year Recommendations

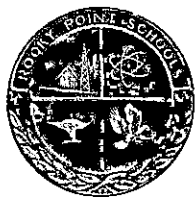
We have performed follow-up internal audit services applicable to our previously issued risk assessment update report dated December 2022. The services we performed included observing and evaluating the implementation status of the District’s action plan in respect to our prior risk assessment recommendations. The December 2022 risk assessment update identified one (1) recommendation within one (1) distinct area. The District has completed or taken action on the one (1) recommendation as follows:

<u>Business Process</u>	<u>Complete</u>	<u>In-Process</u>	<u>Not Started</u>	<u>Total</u>
Purchasing & Related Expenditures	1	-	-	1
Total	1	-	-	1

Purchasing & Related Expenditures

Recommendation from December 2022 Risk Assessment: We recommend that the District review the permissions assigned to the users identified and determine if adjustments are needed. This will ensure that users only have permissions required to perform their job duties.

Status at December 2023: Complete.



ROCKY POINT UNION FREE SCHOOL DISTRICT
OFFICE OF THE SUPERINTENDENT
90 Rocky Point – Yaphank Road
Rocky Point, New York 11778

Telephone: (631) 744-1600

Fax: (631) 849-7558

Dr. Scott O'Brien
Superintendent of Schools

Christopher A. Van Cott
Assistant Superintendent for Business

May 20, 2024

New York State Education Department
Office of Audit Services
89 Washington Avenue
Room 524 EB
Albany, NY 12234

To Whom It May Concern:

The Rocky Point Union Free School District hereby submits a Corrective Action Plan for an updated Risk Assessment as prepared by Nawrocki Smith, LLC. As required under Section 170.12 of the Regulations of the Commissioner of Education, the corrective actions below are intended to ensure the District properly accounts for the findings contained in the report entitled *Rocky Point Union Free School District, Annual Risk Assessment Update Pertaining to the Internal Controls of District Operations, December 2023*.

The Rocky Point UFSD Board of Education has approved this Corrective Action Plan at their May 21, 2024 public meeting. Please note the below findings were also included in the Aug 2023 Cycle audit for Safety & Security which is the reason for August & September 2023 implementation effective dates.

Auditor Recommendation #1:

We noted that the District-wide Safety Plan did not contain the following elements required by NYS Education Law §2801-a and NYSED Regulations of the Commissioner §155.17:

- Procedures for contacting parents in the event of a violent incident or early dismissal
- Procedures for contacting parents in the event of an implied or direct threat of violence by a student against themselves
- Procedures for the dissemination of informative materials regarding the early detection of potentially violent behaviors
- Strategies to improve communication amount students and staff and reporting of potentially violent incidents
- Description of the hiring and training process of security guards

We recommend that the District review and update the District-wide Safety Plan to include the elements noted above to ensure the plan is in compliance with NYS Education Law §2801-a and NYSED Regulations of the Commissioner §155.17.

District Corrective Action(s), Timeline & Responsible Party:

The District has added language to address the recommendations above and the Board of Education has adopted a revised 2023-24 District-Wide Safety Plan. Revisions include:

- Procedures for contacting parents in the event of a violent incident or early dismissal
Added section entitled, “Parent Notification Protocols”. Parent notification protocols include the use of the District’s mass notification system, email distribution lists & telephone calls.
- Procedures for contacting parents in the event of an implied or direct threat of violence by a student against themselves
Added section entitled, “Parent Notification Protocols”. Parent notification protocols include the use of the District’s mass notification system, email distribution lists & telephone calls.
- Procedures for the dissemination of informative materials regarding the early detection of potentially violent behaviors
Each school building within the District employs an Instructional Support Team (IST) comprised of building administration, guidance, faculty and members of Pupil Personnel services; i.e. mental health staff. As part of the IST’s mission, the team reviews incidents of threatening behavior by students (current and former), parents, school employees, or other individuals. This team meets weekly to review cases and discuss potential interventions such as individual/group counseling and/or resources for the household. Relevant information is shared with faculty & staff as needed.
- Strategies to improve communication amount students and staff and reporting of potentially violent incidents
The District employs the “Report It” app, which is an anonymous reporting tool open to students & staff to submit reports of concerning behaviors. District has used this app for several years and promotes it throughout its school buildings. In addition, a variety of student programs aimed at improving the communication of reporting potentially violent incidents are embedded into the curriculum; i.e. Challenge Day (teaches acceptance & respect), grade-level assemblies on “see something, say something” and how to report issues, SCPD SRO assemblies (“stranger danger”), conflict resolution training and mentoring programs involving faculty & students.
- Description of the hiring and training process of security guards
Rocky Point UFSD security guards are required to complete an 8-hour recertification process annually. District ensure all guards complete training and posses a valid NYS school security guard license. Security guard hires are interviewed and evaluated by the Director of Facilities, Senior Guard and the District’s outsource security consultant, Covert Investigations. Preference is given to candidates with law enforcement backgrounds.

Effective 8/28/2023.

Responsible Party: Christopher Van Cott, Assistant Superintendent for Business.

Auditor Recommendation #2:

We noted that the Building Safety Plans did not contain the following elements required by NYS Education Law §2801-a and NYSED Regulations of the Commissioner §155.17:

- Procedures for coordination of the plan with the statewide plan for disaster mental health services
- Procedures for an annual review of the plan and conduct of drills to test components of the plan.

We recommend that the District review and update the Building Safety Plans to include the elements noted above to ensure the plan is in compliance with NYS Education Law §2801-a and NYSED Regulations of the Commissioner §155.17.

District Corrective Action(s), Timeline & Responsible Party:

Each Building-Level Safety Plan was updated to include the below. All Plans were submitted to the SED Business Portal as required:

- Procedures for coordination of the plan with the statewide plan for disaster mental health services
The Rocky Point Union Free School District employs 5 school psychologists, 3 behavior specialists, 4 social workers 9 Registered Nurses and 10 guidance counselors. These District employees will assist in connecting families with the appropriate resources offered by NYS Office of Mental Health – Substance abuse and Mental Health Services Administration (SAMHSA). The NYS OMH offers mental health resources during an emergency including hotlines, mental health resources and psychological first aid education. Additionally, we have a partnership with North Shore Youth Council located in the Rocky Point Community. North Shore Youth Council provides comprehensive, evidence-based youth and family programs and services in child care, enrichment, prevention, education, counseling and recreation.
- Procedures for an annual review of the plan and conduct of drills to test components of the plan.
Training, Drills, and Exercises: the school has established policies and procedures for school safety training for employees and students. Training includes: the annual “early go home drill” to test evacuation and sheltering procedures, the school conducts fire drills throughout the course of the year in compliance with the SED schedule for the purpose of familiarizing employees and students with emergency procedures, & Building-level tabletop exercises. The school conducts drills and other exercises to test and evaluate the effectiveness of the emergency response plan. SROs are invited to these drills/exercises. The building principal will forward a list to the Superintendent of emergency drills and fire drills completed during the school year. Each principal will be required to complete a minimum number of student drills as follows: Fire & Emergency Drills; 12 Drills Annually - 8 conducted between September 1 and December 31, 8 of the drills to be evacuation drills, 4 of the drills to be lockdown drills. Drills to be conducted at different times during the school day. The school conducts tabletop exercises with the building-level safety teams to test the components of the emergency response plan. Topics for training may include general security and safety measures, intervention strategies with difficult or challenging students, building security awareness, and reporting requirements and procedures.

Effective 8/28/2023.

Responsible Party: Christopher Van Cott, Assistant Superintendent for Business.

Auditor Recommendation #3:

We noted two hundred eighteen (218) badges were issued to inactive employees. In addition, we noted that seven (7) employees were issued two (2) badges.

We recommend that the District deactivate the badges for the individuals identified who are no longer active employees. In addition, we recommend that the District implement a procedure to review the badge access listing to ensure only active employees have active badges.

District Corrective Action(s), Timeline & Responsible Party:

All inactive staff provided by auditors were removed from system. District is scheduled to re-badge all staff using updated proximity ID badges by 12/31/2023. This process will ensure only active staff members will be issued a Rocky Point UFSD ID. After this project is completed, going forward, the B&G Dept. will monitor BOE agendas monthly and will remove staff who separate from the District from the ID badge system.

Implementation: Removed inactive users as of 8/31/2023. New employee badges are expected to be issued by 6/1/2024.

Responsible Party: Christopher Van Cott, Assistant Superintendent for Business and Paul Martinez, Director of Facilities.

Auditor Recommendation #4:

We noted that classroom doors were open when classes were in session and empty classroom doors were unlocked at the High School, Middle School, and Frank J. Carasiti Elementary School.

We recommend that the District review procedures with staff to ensure that classroom doors are closed when class is in session or locked when not in use.

District Corrective Action(s), Timeline & Responsible Party:

The District distributes the *Safety & Security Reminders* document below at the beginning of each school year.

Effective 9/5/2023.

Responsible Party: Christopher Van Cott, Assistant Superintendent for Business.



ROCKY POINT UNION FREE SCHOOL DISTRICT
OFFICE OF THE SUPERINTENDENT
90 Rocky Point – Yaphank Road
Rocky Point, New York 11778

Telephone: (631) 744-1600

Fax: (631) 849-7558

Dr. Scott O'Brien
Superintendent of Schools

Christopher A. Van Cott
Assistant Superintendent for Business

Safety & Security Reminders

- School safety and security is everyone's responsibility. If you see something, say something.
- Staff members are to direct all visitors to the visitor desk where visitors are to identify themselves and their purpose in visiting the school.
- If a staff member notices that a visitor is not wearing a visitor's pass, the staff member should question the visitor and report that occurrence to the main office/building principal or designee.
- All unoccupied areas, including classrooms, laboratories, custodial closets, storage rooms etc. shall be locked at all times.
- Teachers are to lock their classroom doors and windows whenever they take students out of the building.
- Classroom doors should be kept closed during the school day; however, if a classroom door is left open during instructional time, it should be kept in a locked position to ensure that doors will be secured when pulled closed in the event of a lock-down.
- Staff members are to report any malfunctioning exterior doors and/or ID card readers to the custodial staff.
- Exterior doors should never be propped open.
- Employee Identification Badges should be visibly worn at all times while in school buildings and grounds.
- Emergency "go-bags" are to be maintained in all school buildings.

Thank you very much for the opportunity to identify revisions & enhancements to continue to improve the District's strong internal controls.

Very truly yours,

A handwritten signature in black ink, appearing to read 'C. Van Cott', written over a horizontal line.

Christopher A. Van Cott
Assistant Superintendent for Business

Cc: Dr. Scott O'Brien, Superintendent of Schools
Virginia Holloway, District Treasurer

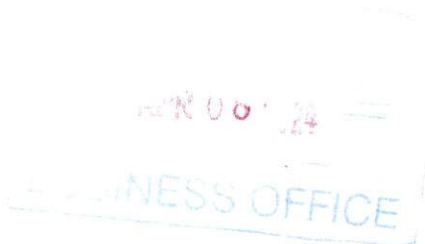


**THREE VILLAGE
CENTRAL SCHOOL DISTRICT**

The mission of the Three Village Central School District, in concert with its families and community, is to provide an educational environment which will enable each student to achieve a high level of academic proficiency and to become a well-rounded individual who is an involved, responsible citizen.

March 21, 2024

Rocky Point UFSD
90 Rocky Point-Yaphank Road
Rocky Point, NY 11778



Re: 2023-2024 Health and Welfare Services Billing

Dear Sir/Madam:

Under the provisions of the Education Law, Section 912, the school district in which a non-public or parochial school is located is required to furnish health services for pupils attending those schools. Under the same law, the district whose children attend such schools is required to pay the costs of these services. Accordingly, we are enclosing (2) copies of the 2023-2024 Health and Welfare Services Agreement for students residing in your district who are attending non-public schools within the Three Village Central School District. Please obtain the required signatures and return one fully executed copy along with your payment. Also enclosed are the following:

- ◆ A list of students attending non-public schools located in the Three Village Central School District
- ◆ A computation of the cost
- ◆ An invoice for the total amount due

If you have any questions, please contact the Business Office at 631-730-4082.

Thank you in advance for your prompt attention.

Sincerely,
Faine Christie
Accounting Department

Dr. Kevin Scanlon, **Superintendent of Schools**
Jeffrey Carlson, **Deputy Superintendent**
Dr. Gary Dabrusky, **Assistant Superintendent, Human Resources**
Dr. Brian Biscari, **Assistant Superintendent, Educational Services**
100 Suffolk Avenue ■ Stony Brook, New York 11790 ■ Telephone: 631-730-4000 ■ Fax: 631-474-7784

Board of Education
Susan E. Megroz Rosenzweig, President
Vincent Vizzo, Vice President

Dr. Jeffrey Kerman
Dr. Shaorui Li
Dr. David McKinnon

Karen Roughley
Inger Germano, District Clerk

HEALTH AND WELFARE SERVICES AGREEMENT

This Agreement is entered into this 21st day of ~~March~~ ^{May}, 2024 by and between the Board of Education of the Three Village Central School District of Brookhaven & Smithtown (hereinafter "THREE VILLAGE"), having its principal place of business for the purpose of this Agreement at 100 Suffolk Avenue, Stony Brook, New York 11790, and the Board of Education of the **ROCKY POINT UNION FREE SCHOOL DISTRICT** (hereinafter "ROCKY POINT"), having its principal place of business for the purpose of this Agreement at 90 Rocky Point-Yaphank Road, Rocky Point, New York 11778.

W I T N E S S E T H

WHEREAS, ROCKY POINT is authorized pursuant to Section 912 of the Education Law, to enter into a contract with THREE VILLAGE for the purpose of having THREE VILLAGE provide health and welfare services to children residing in ROCKY POINT and attending a non-public school located in THREE VILLAGE.

WHEREAS, certain students who are residents of ROCKY POINT are attending non-public schools located in THREE VILLAGE,

WHEREAS, THREE VILLAGE has received a request(s) from said non-public schools for the provision of health and welfare services to the aforementioned students,

NOW THEREFORE, in consideration of the mutual promises and covenants contained in this Agreement, the parties hereby mutually agree as follows.

1. **The term of this Agreement shall be from September 5, 2023 through June 26, 2024 inclusive.**
2. THREE VILLAGE warrants that the health and welfare services will be provided by licensed health care providers. THREE VILLAGE further represents that such services shall be performed by health care providers that are licensed under the laws of the State of New York, including New York State Department of Health and the State Education Department licensing requirements, if applicable. THREE VILLAGE further represents that such services will be in accordance with all applicable provisions of Federal, State, and local laws, rules, and regulations, including Section 912 of the Education Law, and the student's IEP, if applicable. THREE VILLAGE shall certify that all service providers possess documentation evidencing such license qualifications as required by Federal, State, and local laws, rules, regulations and orders.
3. THREE VILLAGE understands and agrees that it will comply and is responsible for complying with all applicable Federal, State, and local laws, rules and regulations with respect to the services provided pursuant to this Agreement.
4. The services provided by THREE VILLAGE shall be consistent with the services available to students attending public schools within the THREE VILLAGE School District; and may include, but are not limited to:

- a. all services performed by a physician, physician assistant, dentist, dental hygienist, registered professional nurse, nurse practitioner, school psychologist, school social worker, or school speech therapist,
- b. dental prophylaxis,
- c. vision and hearing screening examinations,
- d. the taking of medical histories and the administration of health screening tests,
- e. the maintenance of cumulative health records, and
- f. the administration of emergency care programs for ill or injured students.

It is expressly understood and agreed between the parties that the services to be provided pursuant to this Agreement shall not include any teaching services.

5. In exchange for the provision of health and welfare services pursuant to this Agreement, ROCKY POINT agrees to pay THREE VILLAGE the sum of \$1798.26 per eligible pupil for the 2023-2024 school year.
6. ROCKY POINT shall pay THREE VILLAGE within thirty (30) days of ROCKY POINT's receipt of a detailed written invoice from THREE VILLAGE. Said invoice shall specify the services provided, dates that the invoice covers, and the total amount due for the period specified.
7. If, during the term of this Agreement, a student becomes eligible to receive services pursuant to this Agreement, THREE VILLAGE shall undertake to provide services pursuant to this Agreement, and the amount of compensation owed by ROCKY POINT shall be prorated accordingly to accurately reflect the period of time services were provided to the student.
8. If, during the term of this Agreement, a student ceases to be eligible to receive services pursuant to this Agreement, THREE VILLAGE shall no longer be responsible for providing services to that student pursuant to this Agreement, and the amount of compensation owed by ROCKY POINT shall be prorated accordingly to accurately reflect the period of time services were provided to the student.
9. THREE VILLAGE shall furnish any supplies or equipment necessary to provide the services pursuant to this Agreement to the extent such items are not provided by the non-public school.
10. Both parties agree to provide the State access to all relevant records which the State requires to determine either THREE VILLAGE's or ROCKY POINT's compliance with applicable Federal, State, or local laws, rules, or regulations with respect to provision of services pursuant to this Agreement. Both parties agree to retain all materials and records relevant to the execution or performance of their obligations pursuant to this Agreement in accordance with the record retention requirements for such materials and records.
11. Both parties to this Agreement understand that they may receive and or come into contact with protected health information as defined by the Health Insurance Portability and Accountability Act of 1996 (HIPAA). The parties hereby acknowledge their respective responsibilities pursuant to HIPAA and shall comply with said Regulations, if applicable.
12. Both parties, their employees, and/or agents agree that all information obtained in connection with the services performed pursuant to this Agreement is deemed confidential

information. Both parties, their employees, and/or agents shall not use, publish, discuss, disclose or communicate the contents of such information, directly or indirectly with third parties, except as provided for in this Agreement. Both parties further agree that any information received by either party's employees and/or agents in connection with this Agreement which concerns the personal, financial, or other affairs of the parties, their employees, agents, and/or students will be treated as confidential and will not be revealed to any other persons, firms, organizations, or third parties. In addition, both parties agree that information concerning any student covered by the terms of this Agreement shall not be released except as provided for by applicable law, rule, or regulation, including but not limited to the Family Educational Rights and Privacy Act (FERPA).

13. Services provided pursuant to this Agreement shall be provided without regard to race, creed, color, sex, sexual orientation, national origin, religion, age, disability, or sponsorship.
14. All notices which are required or permitted under this Agreement shall be in writing, and shall be deemed to have been given if delivered personally or sent by registered or certified mail, addressed as follows:

ROCKY POINT UNION FREE SCHOOL DISTRICT
90 Rocky Point-Yaphank Road
Rocky Point, NY 11778

THREE VILLAGE CENTRAL SCHOOL DISTRICT
100 Suffolk Avenue
Stony Brook, New York 11790
15. It is expressly understood that this Agreement shall not be assigned or transferred without prior written consent of the other party.
16. The failure of either party to enforce any provision of this Agreement shall not be construed as a waiver or limitation of that party's right to subsequently enforce every provision of this Agreement.
17. Should any provision of this Agreement, for any reason, be declared invalid and/or unenforceable, such decision shall not affect the validity of the remaining provisions of this Agreement. Such remaining provisions shall remain in full force and effect as if this Agreement had been executed with the invalid provision(s) eliminated.
18. This Agreement and the rights and obligations of the parties hereunder shall be construed in accordance with, and governed by, the laws and regulations of the State of New York and applicable Federal laws and regulations
19. This Agreement is the complete and exclusive statement of the Agreement between the parties, and supersedes all prior or contemporaneous, oral or written: agreements, proposals, understandings, representations, conditions or covenants between the parties relating to the subject matter of the Agreement.
20. This Agreement may not be changed orally, but only by an Agreement, in writing, signed by authorized representatives of both parties.

21. It is mutually agreed that this contract shall not become valid and binding upon either party until the contract is approved by the Superintendent of Schools for the Rocky Point Union Free School District.

IN WITNESS WHEREOF, the parties have set their hands and seals the day and year written above.

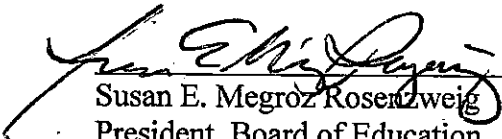
Rocky Point Union Free School District

Dr. Scott O'Brien
Superintendent of Schools

ROCKY POINT UFSD

THREE VILLAGE CSD

Jessica Ward
President, Board of Education



Susan E. Megroz Rosenzweig
President, Board of Education

Grade	Last Name	First Name	B Day	B Month	B Year	Home Address	Home Town	School District	Private School
✓ 2nd			12	11	2016		Rocky Point	ROCKY POINT	Laurel Hill
✓ 2nd			10	09	2016		Sound Beach	ROCKY POINT	Laurel Hill
✓ 4th			11	09	2014		Sound Beach	ROCKY POINT	Laurel Hill
✓ 1st			15	02	2017		Sound Beach	ROCKY POINT	Laurel Hill
✓ 6th			03	01	2012		Sound Beach	ROCKY POINT	Laurel Hill

ok (5)
 D. Hoffman

**THREE VILLAGE CENTRAL SCHOOL DISTRICT
HEALTH SERVICES CALCULATION
2023-2024**

Salaries:

Nurses	1,381,301
Speech	2,461,579
Psychologists	1,615,235
Social Workers	1,336,927
Clerical	342,360
Total Salaries	7,137,402
Fringe Benefits @ 41%	2,926,335
<i>Total Salaries & Benefits</i>	<i>10,063,737</i>
<i>Supplies/Equipment/Contractual</i>	100,030
<u>Total Costs</u>	<u>10,163,767</u>

Enrollment:

Three Village Central School District	5,497
Laurel Hill	146
North Shore Montessori	9
<u>Total Student Enrollment</u>	<u>5,652</u>

<i>Total cost per student</i>	<i>1,798.26</i>
--------------------------------------	------------------------

Issue Date
04/04/2024

Three Village Central School District
100 Suffolk Ave
Stony Brook, NY 11790

Invoice Number
149-24A



INVOICE

Issued To:
Rocky Point UFSD 90 Rocky Point-Yaphank Rd. Rocky Point, NY 11778
009651

Item Number	Item Description	Amount
HLTH SVC-HEALTH	Health Services provided for the 2023-2024 school year. Please see attached contracts. 5.0000 @ 1,798.2600 per Student	8,991.30
Invoice Total		8,991.30



SOUTH HUNTINGTON
UNION FREE SCHOOL DISTRICT

CREATING THE LEADERS OF TOMORROW

SUPERINTENDENT OF SCHOOLS
Vito M. D'Elia, Ed.D
vdellia@shufsd.org

Executive Director for Business
Michael J. Conway
mconway@shufsd.org
Phone: 631-812-3001

March 2024

Mr. Christopher Van Cott
Asst. Supt. for Business
Rocky Point UFSD
90 Rocky Point-Yaphank Road
Rocky Point, NY 11778

Dear Mr. Van Cott:

We are enclosing two (2) copies of the Health and Welfare Service Agreement covering health services to be furnished during the school year 2023-2024 for resident students who attend St. Anthony's High School, Long Island School for the Gifted and/or Huntington Montessori located in the South Huntington Union Free School District, Huntington Station, New York. Please obtain the necessary signatures and return one (1) copy to this office.

We are also enclosing a listing of students residing in your district, an invoice for the total amount due, and a Health Services cost breakdown. Please remit payment at your earliest convenience.

If you have any questions, please do not hesitate to contact the Business Office at 631-812-3004.

Very truly yours,

Michael J. Conway
Executive Director for Business

MJC/fi
Enclosures

APR 03 2024
BUSINESS OFFICE

HEALTH AND WELFARE SERVICE AGREEMENT

THIS AGREEMENT is entered into this first day of July 2023, by and between the Board of Education of the South Huntington Union Free School District (hereinafter "PROVIDER"), having its principal place of business for the purpose of this Agreement at 60 Weston Street, Huntington Station, NY 11746, and the Board of Education of the ROCKY POINT UNION FREE SCHOOL DISTRICT (hereinafter "SENDER"), having its principal place of business for the purpose of this Agreement at 90 Rocky Point-Yaphank Road, Rocky Point, NY 11778.

WITNESSETH

WHEREAS, South Huntington Union Free School District is authorized pursuant to Section 912 of the Education Law, to enter into a contract with SENDER for the purpose of having South Huntington UFSD provide health and welfare services for children residing in the Rocky Point UFSD and attending a non-public school located in the South Huntington Union Free School District,

WHEREAS, certain students who are residents of SENDER are attending non-public schools located in South Huntington UFSD,

WHEREAS, South Huntington UFSD has received a request(s) from said non-public schools for the provision of health and welfare services to the aforementioned students,

NOW THEREFORE, in consideration of the mutual promises and covenants contained in this Agreement, the parties hereby mutually agree as follows:

1. The term of this Agreement shall be from July 1, 2023 through June 30, 2024 inclusive.
2. South Huntington UFSD warrants that the health and welfare services will be provided by licensed health care providers. South Huntington UFSD further represents that such services shall be performed by health care providers that are licensed under the laws of the State of New York, including New York State Department of Health and State Education Department licensing requirements, if applicable. South Huntington Union Free School District further represents that such services will be in accordance with all applicable provisions of Federal, State, and local laws, rules and regulations, including, Section 912 of the Education Law, and the student's IEP, if applicable. South Huntington UFSD shall certify that all service providers possess documentation evidencing such license qualifications as required by Federal, State, and local laws, rules, regulations and orders.
3. South Huntington Union Free School District understands and agrees that it will comply and is responsible for complying with all applicable Federal, State and local laws, rules and regulations with respect to the services provided pursuant to this Agreement.
4. The services provided by South Huntington UFSD shall be consistent with the services available to students attending public schools within the South Huntington UFSD; and may include, but are not limited to:

- a. all services performed by a physician, physician assistant, registered professional nurse, nurse practitioner, school psychologist, school social worker, or school speech therapist,
- b. Vision and hearing screening examinations,
- c. The taking of medical histories and the administration of health screening tests,
- d. the maintenance of cumulative health records, and
- e. the administration of emergency care programs for ill or injured students.

It is expressly understood and agreed between the parties that the services to be provided pursuant to this Agreement shall not include any teaching services.

5. In exchange for the provision of health and welfare services pursuant to this Agreement, Rocky Point UFSD agrees to pay South Huntington UFSD the sum of **\$888.05** per eligible pupil for the **2023-2024** school year.
6. SENDER shall pay South Huntington UFSD within thirty (30) days of SENDER's receipt of a detailed written invoice from South Huntington UFSD. Said invoice shall specify the services provided, dates that the invoice covers, and the total amount due for the period specified.
7. If, during the term of this Agreement, a student becomes eligible to receive services pursuant to this Agreement, South Huntington UFSD shall undertake to provide services pursuant to this Agreement, and the amount of compensation owed by SENDER shall be prorated accordingly to accurately reflect the period of time services were provided to the student.
8. If, during the term of this Agreement, a student ceases to be eligible to receive services pursuant to this Agreement, South Huntington UFSD shall no longer be responsible for providing services to that student pursuant to this Agreement, and the amount of compensation owed by SENDER shall be prorated accordingly to accurately reflect the period of time services were provided to the student.
9. South Huntington UFSD shall furnish any supplies or equipment necessary to provide the services pursuant to this Agreement to the extent such items are not provided by the nonpublic school.
10. Both parties agree to provide the State access to all relevant records which the State requires to determine either South Huntington UFSD's or SENDER's compliance with applicable Federal, State, or local laws, rules or regulations with respect to provision of services pursuant to this Agreement. Both parties agree to retain all materials and records relevant to the execution or performance of their obligations pursuant to this Agreement in accordance with the record retention requirements for such materials and records.
11. Both parties to this Agreement understand that they may receive and/or come into contact with protected health information as defined by the Health Insurance Portability and Accountability Act of 1996 ("HIPAA") and information protected by the Family Educational Rights and Privacy Act ("FERPA"). The Parties hereby acknowledge their respective responsibilities pursuant to HIPAA and FERPA and, if necessary, shall execute a Business Associate Agreement in connection with such responsibilities.
12. Both parties, their employees, and/or agents agree that all information obtained in connection with the services provided for in this Agreement is deemed confidential

information. Both parties, their employees, and/or agents shall not use, publish, discuss, disclose or communicate the contents of such information, directly or indirectly with third parties, except as provided for in this Agreement. Both parties further agree that any information received by either party's employees and/or agents in connection with this Agreement which concerns the personal, financial, or other affairs of the parties, their employees, agents, and/or students will be treated as confidential and will not be revealed to any other persons, firms, organizations, or third parties. In addition, both parties agree that information concerning any student covered by the terms of this Agreement shall not be released except as provided for by applicable law, rule or regulation, including but not limited to Family Educational Rights and Privacy Act ("FERPA").

13. Neither party will discriminate against any individual because of his/her age, race, creed, color, national origin, sexual orientation, military status, sex, disability, predisposing genetic characteristics or marital status and will take affirmative action to ensure that each individual is afforded equal opportunities without discrimination because of his/her age, race, creed, color, national origin, sexual orientation, military status, sex, disability, predisposing genetic characteristics or marital status.
14. All notices which are required or permitted under this Agreement shall be in writing, and shall be deemed to have been given if delivered personally or sent by registered or certified mail, addressed as follows:

 PROVIDER: Superintendent of Schools
 South Huntington Union Free School
 60 Weston Street, Huntington Station
 New York, 11746

 SENDER: Superintendent of Schools
 Rocky Point UFSD
 90 Rocky Point-Yaphank Road, Rocky Point
 NY, 11778
15. It is expressly understood that this Agreement shall not be assigned or transferred without prior written consent of the other party.
16. The failure of either party to enforce any provision of this Agreement shall not be construed as a waiver or limitation of that party's right to subsequently enforce every provision of this Agreement.
17. Should any provision of this Agreement, for any reason, be declared invalid and/or unenforceable, such decision shall not affect the validity of the remaining provisions of this Agreement. Such remaining provisions shall remain in full force and effect as if this Agreement had been executed with the invalid provision(s) eliminated.
18. This Agreement shall be governed by, and interpreted and enforced in accordance with, the laws of the State of New York without regard to conflicts or choice of law provisions that would defer to the substantive laws of another jurisdiction. Each of the parties hereto consents to the jurisdiction of any state court located within the County of Suffolk, State of New York, or federal court in Federal District Court for the Eastern District of New York located in the County of Suffolk, State of New York, and irrevocably agrees that all actions or proceedings relating to this Agreement must be litigated in such courts, and each of the

ROCKY POINT - ST. ANTHONY'S

STUDENT		GRADE	ADDRESS	PARENT
		9		
		9		
		11		
		10		
		9		

South Huntington UFSD Health Services Rate Calculation 2023-2024 School Year

SPEECH THERAPISTS

Salaries	1,461,225.06
Benefits	589,735.52

PSYCHOLOGISTS

Salaries	1,267,504.04
Benefits	480,308.45

SOCIAL WORKERS

Salaries	1,315,197.00
Benefits	461,272.84

REGISTERED NURSES

Salaries	1,032,784.04
Benefits	499,471.01

TOTAL SALARIES

5,076,710.14

TOTAL BENEFITS

2,030,787.82

HEALTH SOURCE GROUP -Contracted nurses

15,500.00

DR. JACK GEFFKEN

38,200.00

RELATED EXPENSES - Supplies, materials, equipment, etc.

32,896.03

GRAND TOTAL

7,194,093.99

ENROLLMENT:

Public School	5,716
St. Anthony's HS	2,449
Long Island School for the Gifted	133
Huntington Montessori	36
F1 Foreign Exchange Students	(233)

TOTAL ENROLLMENT

8,101

TOTAL COST PER STUDENT

\$ 888.05

Issue Date
03/06/2024

SOUTH HUNTINGTON UFSD
 ADMINISTRATION BUILDING
 60 WESTON STREET
 HUNTINGTON STATION, NY 11746-4098

Invoice Number
211-24A



INVOICE

Issued To:
ROCKY POINT UFSD ROCKY POINT CHEER/C/O I ROTH 76 WOODLAWN AVE OAKDALE, NY 11769
CHEER

Item Number	Item Description	Amount
	HEALTH SERVICES FOR STUDENTS ATTENDING NON-PUBLIC SCHOOLS LOCATED IN SOUTH HUNTINGTON UFSD FOR THE 2023-2024 SCHOOL YEAR ST. ANTHONY'S HIGH SCHOOL - 5 STUDENTS @ \$888.05=\$4,440.25 1.0000 @ 4,440.2500	4,440.25
Invoice Total		4,440.25

Please make check payable to: South Huntington Union Free School District - General Fund
 If you have any questions regarding the above, please call Francine Isernia at 631-812-3004.

HEALTH AND WELFARE SERVICE AGREEMENT

THIS AGREEMENT made in duplicate this 26 day of March, 2024, by and between the Rocky Point Union Free School District, the central office of which is located at 90 Rocky Point-Yaphank Rd, Rocky Point, NY 11778, as the ***District of Residence***, and the Hauppauge Union Free School District, the central office of which is located at 495 Hoffman Lane, Hauppauge, New York 11788, as the ***District of Location***.

WITNESSETH, THAT whereas District of Residence has been duly empowered by the provisions of Section 912 of the Education Law to enter into a contract for the purpose of providing health and welfare services for children residing in said school district and attending non-public schools in the Hauppauge Union Free School District for the 2023-2024 school year.

NOW THEREFORE, the said District of Residence hereby agrees to pay the Hauppauge Union Free School District the sum of **\$1,237.00** for each child for health and welfare services to be provided under Section 912 to children residing in the District of Residence and attending non-public schools in Hauppauge Union Free School District, Hauppauge, New York.

And the Hauppauge Union Free School District hereby agrees with the party of the first part as follows:

1. The parties incorporate the above statements of this Agreement as if fully set forth herein.
2. The health and welfare services provided by Hauppauge Union Free School District may include, but are not limited to, the following:

- Physician Services
- Dentist and Dental Hygienist Services
- School Nursing Services
- School Psychological Services
- School Social Work Services
- School Speech Services
- Examinations for participants in athletics
- Notification of parents regarding defect and follow up
- Vision and hearing tests
- Maintenance of cumulative health records
- Administration of emergency care for ill or injured students.

3. The Hauppauge Union Free School District will also furnish the following equipment to be used in providing such services if requested by the authorities in charge of the non-public school:

- Supplies and equipment for use by the physician, dentist, dental hygienist, school nurse, psychologist, social worker and speech therapist (i.e., scales, vision and hearing testing devices, health record forms, first-aid supplies

and all other readily transportable equipment and supplies pertaining to the delivery of services).

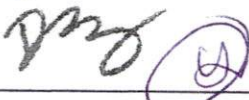
4. It is expressly agreed by and between the parties hereto that the services agreed to be supplied under this contract will not include any teaching service.
5. It is mutually agreed that this Agreement will not become valid and binding upon either party thereto until the same has been executed by: (i) duly authorized representatives of both parties; and (ii) the Superintendent of Schools of the District of Residence.
6. There are no third-party beneficiaries of or in this Agreement.
7. This Agreement may not be changed orally, but only by an agreement in writing signed by both parties. This Agreement contains the entire agreement of the parties with respect to the subject matter thereof and supersedes any and all other agreements, understandings and representations, written or oral, by and between the parties.
8. This Agreement will not be assigned or transferred without the prior written consent of the other party.
9. The Agreement may be executed in one or more counterparts, all of which will be considered one and the same agreement. The Agreement may be executed by facsimile or PDF signature, each of which will constitute an original for all purposes.

IN WITNESS WHEREOF, the parties have hereto have executed this agreement as of the latter date that appears below.

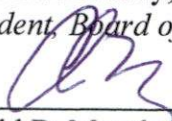
District of Residence
Rocky Point UFSD

District of Location
Hauppauge UFSD

By: _____
President, Board of Education

By:  _____
David M. Barshay, Esq.
President, Board of Education

By: _____
Superintendent of Schools

By:  _____
Donald B. Murphy, Ed.D.
Superintendent of Schools

Date: _____, 2024

Date: 3/26, 2024

Health Services 2023/24 Ivy League/Hauppauge UFSD							
		1st Grade		Rocky Point	NY	11778	Rocky Point
							1 Student

ok ①

D Hoffman
3/18/24

HAUPPAUGE UNION FREE SCHOOL DISTRICT	
HEALTH SERVICES 2023 - 2024	
<u>SERVICES</u>	
PROFESSIONAL SERVICES	
Nurses	\$ 756,852
Psychologists	\$ 764,905
Social Workers	\$ 549,109
Speech	\$ 732,579
Administration	\$ 54,200
	\$ 2,857,645
Employee Benefits (Health, Retirement Systems, FICA, etc.)	\$ 1,000,176
SUB-TOTAL Salaries	\$ 3,857,821
Physician	\$ 55,000
Contractual Psychologist	\$ -
Contractual Speech	\$ -
SUB-TOTAL Contractual	\$ 55,000
Total Professional Services	\$ 3,912,821
NON-PROFESSIONAL SERVICES	
SALARIES:	
Clerical Personnel	\$ 71,173
SUB-TOTAL	\$ 71,173
Employee Benefits (Health, Retirement Systems, FICA, etc.)	\$ 24,910
Total Non-Professional Services	\$ 96,083
SUPPLIES & MATERIALS, EQUIPMENT	
Supplies & Materials, Equipment	\$ 20,000
Total Supplies & Materials, Equipment	\$ 20,000
ENROLLMENT	
HAUPPAUGE SCHOOLS	3172
IVY LEAGUE	85
Total Enrollment	3257
Total Expenses	\$ 4,028,904
COST PER STUDENT	\$ 1,237
(Total Expenses / Total Enrollment)	

Hauppauge Public Schools

P.O. Box 6006
 Hauppauge, NY 11788

INVOICE**29213**

Invoice Date 04/15/2024

Customer No. 171

Customer / Bill To:
Rocky Point UFSD 90 Rocky Point-Yaphank Road Rocky Point, NY 11778

Remit To:
Hauppauge Public Schools P.O. Box 6006 Hauppauge, NY 11788 ATTN: Business Office

Phone	Fax	E-Mail Address	Terms	Invoice Amount
(631) 761-8205	(631) 265-4804	jacksonk@hauppauge.k12.ny.us	DUE UPON RECEIPT	1,237.00

Items / Services	Cost Basis	Quantity	Unit Price	Amount
Health Services 2023/24 Health Services as per attached	STU	1.00	1,237.000	1,237.00

FOR QUESTIONS REGARDING THIS INVOICE PLEASE CONTACT KAREN JACKSON 631.761.8205

TOTAL: 1,237.00

Page 1 of 1

DETACH HERE AND SEND WITH PAYMENT

Rocky Point UFSD
 90 Rocky Point-Yaphank Road
 Rocky Point, NY 11778

Invoice No. 29213

Invoice Date 04/15/2024

Customer No. 171

Total Due: \$1,237.00

Mail Payments To:

Hauppauge Public Schools
 P.O. Box 6006
 Hauppauge, NY 11788
ATTN: Business Office

Payment Terms: DUE UPON RECEIPT

Amount Enclosed

E-RATE PURCHASE AGREEMENT

Form – E-Rate FY27 2024-2025

Contract Number: 124045

This E-Rate Customer Purchase Agreement (this “Agreement”) is entered into on April 1, 2024 (“Effective Date”) and is made by and between CDW Government LLC an Illinois limited liability corporation with an office at 230 N. Milwaukee Ave., Vernon Hills, Illinois 60061 (“Seller”), and Rocky Point Union Free School District, a non-profit school or library eligible for Universal Service funding, as defined below.

E-Rate Contract Number	124045	Spin #	143005588
E-Rate Funding Year	2024	FCC Registration #	0012123287
Customer	Rocky Point Union Free School District 90 Rocky Point- Yaphank Road Rocky Point, New York, 11778	Seller	CDW Government LLC 230 N. Milwaukee Avenue Vernon Hills, IL 60061
Effective Date	April 1, 2024	Quoted Items (see exhibit 1)	470# 240006023

1. DEFINITIONS

As used in the Agreement, the following terms shall have the meanings set forth below:

- A. “Universal Service Administrative Co.” or “USAC” – The not for profit organization designated by the U.S. Federal Communications Commission (“FCC”) to administer and ensure compliance with the Universal Services Fund.
- B. “SLP” - The Schools and Libraries Program of the Universal Service Fund, which includes the E-Rate Program and that is administered by USAC under the direction of the FCC.
- C. “E-Rate” – The education rate funding program that is a part of SLP that provides discounts to keep students and library patrons connected to broadband and voice services and which is one of the programs that form the Universal Service Program.
- D. “Funding Commitment Decision Letter” or “FCDL” – A letter that a Customer receives from USAC which indicates the applicable discount amount for a specific funding year.
- E. “Products” – E-Rate eligible products or services that include computer related hardware but are not limited to caching servers, routers, switches, wireless access points, installation, and warranty maintenance and other items which are eligible for E-Rate discounts in accordance with the rules issued by USAC.
- F. “Funding Year” – The specific calendar period, as defined by the SLP, during which the Customer is approved for funding or discounts on Products. FY 2024 is in reference to the program year.

2. TERMS AND CONDITIONS

All orders submitted to Seller by Customer for Products under this Agreement are subject to the terms and conditions of the Sourcewell 081419-NY K-12 (081419-CDW) Contract, unless otherwise stated herein in the Agreement.

3. PURCHASE AUTHORIZATIONS

A. E-Rate Status

- i. Customer represents and warrants that it qualifies as eligible under the SLP to receive E-Rate funding.
- ii. CUSTOMER FURTHER ACKNOWLEDGES AND AGREES THAT THIS AGREEMENT, WHEN EXECUTED, CONSTITUTES A CONTRACT AS REQUIRED BY USAC and the SLP.

B. E-Rate Purchases

- i. Customer represents and warrants that all purchases made under this Agreement shall be for its own use and that it is eligible to receive E-Rate funding as specified by USAC.

CDW Government LLC

SPIN #143005588

4/25/2024

E-RATE PURCHASE AGREEMENT

Form – E-Rate FY27 2024-2025

Contract Number: 124045

- ii. IN ACCORDANCE WITH FCC REQUIREMENTS, THE CUSTOMER SHALL SUBMIT A COMPLETED AND SIGNED FCC FORM 486 TO USAC The Form 486 shall be approved by USAC prior to order placement with Seller.

4. ORDERING AND ASSISTANCE

A. Ordering

Purchase orders shall be submitted through electronic means (email, electronic data interchange (EDI), etc.) directly to Customer's dedicated account manager. Alternatively, if a copy must be sent via mail, common courier, etc., please reach out to your account manager for the appropriate mailing address.

B. Other Requirements

- i. All purchase orders shall include 1) a contact name; 2) phone number; 3) purchase order number; 4) CDW Part Number and OEM Part Number; 5) Product description; 6) original and discounted Product price 7) percentage Customer owes and percentage SLP owes (if applicable) 8) ship to location; 9) bill to location; 10) BEAR or SPI Order; and 11) FCC Form 471 and FRN number for each part number. SEPARATE PURCHASE ORDERS SHALL BE SUBMITTED FOR PRODUCTS THAT ARE NOT ELIGIBLE FOR E-RATE FUNDING. ALL ORDERS SHALL BE SUBJECT TO ACCEPTANCE BY SELLER.
- ii. If the Customer is unable to commit the full purchase order amount, any balance remaining that was not funded or approved for payment by USAC will be the responsibility of the Customer. The Customer must add the following language to its purchase order:

"The total cost of this purchase order is \$2,858.78. The E-Rate portion is \$4,288.18, and is committed by USAC. If there is any reduction or denial of payment with the E-Rate portion, Rocky Point Union Free School District accepts full responsibility for the cost of this purchase, \$7,146.96."
- iii. Should Customer choose to add Product or make substitutions to the Products originally sought, following USAC's funding decision, Customer agrees it will be responsible for the amounts owed for the added or substituted Products in excess of its committed funding from USAC.
- iv. Customer must complete installation of Products ordered pursuant to this Agreement within thirty (30) days of delivery. In the event Customer, or a third party hired by Customer to complete the installation, fails to install the Products within the timeframe provided herein, the Parties acknowledge and agree that Customer will begin to accrue interest on the amounts owed for such Products in an amount of one and one-half percent (1.5%) per month, or the maximum rate permitted by applicable law.

C. Assistance with Order

- i. Customer may call 1-800-328-4239 to get assistance on any purchase order. Any terms or conditions stated in or on the Customer's purchase order which are inconsistent with or in addition to the terms and conditions in this Agreement or the Product Sales Terms and Conditions shall not be valid, are considered null and void and shall not be applicable to or binding on Seller.
- ii. FOR PRODUCTS WHICH ARE DISCONTINUED AFTER A CUSTOMER ORDER HAS BEEN ACCEPTED BY SELLER BUT BEFORE THE PRODUCT HAS SHIPPED, SELLER WILL MAKE REASONABLE EFFORTS TO OFFER A COMPARABLE OR BETTER PRODUCT AT THE SAME OR LESSER PRICE, IF AVAILABLE, UPON SLP'S APPROVAL OF THE PRODUCT SUBSTITUTION. ANY INCREASE IN PRICE THAT CANNOT BE ABSORBED BY THE SELLER WILL BE THE RESPONSIBILITY OF Rocky Point Union Free School District.

5. PRICE AND PAYMENT TERMS

- i. Payment terms are subject to continuing credit approval by Seller. Seller may change credit or payment terms at any time when, in Seller's opinion, Customer's financial condition, previous payment record, or the nature of Customer's relationship with Seller so warrants.

CDW Government LLC

SPIN #143005588

4/25/2024

To the extent allowable, all information and documents hereby submitted in response to the Request for Quote ("RFQ") furnished by Rocky Point Union Free School District are the Proprietary and Confidential property of CDW Government LLC ("CDW-G").
© CDW Government LLC 2024

E-RATE PURCHASE AGREEMENT

Form – E-Rate FY27 2024-2025

Contract Number: 124045

- ii. Seller may discontinue performance under this Agreement (i) if Customer fails to pay any sum when due under this Agreement or any other agreement with Seller until payment is received or (ii) if Customer is in violation of applicable laws and regulations.

A. Price

The Price shall be as set forth on the Customer's quote from Seller and which is in the form attached hereto as Exhibit I, and as amended from time to time. All prices are exclusive of federal, state, local, or other taxes, which shall be the responsibility of the Customer.

Payment Terms

- i. All payments, regardless of method, shall be submitted to "Accounts Receivable", please contact your account manager for payment method options.
- ii. CUSTOMER MAY EITHER WAIT TO PLACE AN ORDER PRIOR TO OR AFTER RECEIPT OF ITS FCDL. IN THE EVENT THAT CUSTOMER PLACES AN ORDER PRIOR TO RECEIPT OF THE FCDL, CUSTOMER SHALL BE RESPONSIBLE FOR PAYMENT OF THE ENTIRE PURCHASE PRICE WITHOUT REGARD TO SLP FUNDING.
- iii. Customer must choose one of the following payment methods. However, Customers that choose to order Products prior to receiving their FCDL must follow the BEAR payment method.
 - Form 474 Service Provider Invoice (SPI) Method**
Seller will invoice the Customer for the Product price, as set forth on the Product quote, net of the FCDL amount. Customer shall be responsible for making payment within thirty (30) days from date of invoice.
 - Form 472 Billed Entity Applicant Reimbursement (BEAR) Method**
Seller will invoice Customer, upon Product shipment, for the total purchase price without regard to any SLP funding applied to that purchase price for the Products. Customer shall pay the invoiced amount within thirty (30) days from the date of invoice.
- iv. Seller accepts BEAR orders beginning April 1 before the beginning of the Funding Year. Seller accepts SPI orders beginning July 1 of the Funding Year when Customer has received its FCDL and completed the FCC Form 486, Seller DOES NOT accept SPI orders before July 1 of the Funding Year, or prior to the Form 486 approval by USAC.

6. NON-ASSIGNABILITY AGREEMENT

Customer shall not assign or otherwise transfer its rights or delegate its obligations under this Agreement without Seller's advance written consent. Any attempted assignment, transfer or delegation without such consent shall be void.

The term of this Agreement shall commence on April 1, 2024 ("Effective Date") and be valid through the later of the Funding Year 2024 or 9/30/2025.

- i. Seller may terminate this Agreement at any time for any reason upon thirty (30) days prior written notice to the Customer.

Customer may terminate this Agreement or withdraw an order upon written notice to Seller if: (a) funds are not appropriated to Customer under this program, or (b) Customer's School Board rejects this Agreement ("Termination Notice"). In the event that Customer terminates this Agreement due to non-appropriation of funds, or termination for convenience, then Seller may immediately cease performance. However, the Customer shall remain liable for any Products that have shipped or services, already provided, or have been subscribed or purchased prior to Seller's receipt of the Termination Notice. Customer shall also be responsible for any of Seller's out-of-pocket costs arising as a result of any such termination.
- ii. In the event Customer receives an extension of funding from SLP, Customer will notify Seller in writing and the parties may agree to execute an amendment to extend this Agreement.

7. NOTICES

All notices and other communications required or permitted under this Agreement shall be served in person or sent by U.S. mail, Federal Express, or equivalent carrier to the party's address listed above.

CDW Government LLC

SPIN #143005588

4/25/2024

To the extent allowable, all information and documents hereby submitted in response to the Request for Quote ("RFQ") furnished by Rocky Point Union Free School District are the Proprietary and Confidential property of CDW Government LLC ("CDW-G").
© CDW Government LLC 2024

E-RATE PURCHASE AGREEMENT

Form – E-Rate FY27 2024-2025

Contract Number: 124045

8. GENERAL

If any term or provision herein is determined to be illegal or unenforceable, the validity or enforceability of the remainder of the terms or provisions herein will remain in full force and effect.

9. ENTIRE AGREEMENT

This Agreement constitutes the entire agreement between Seller and Customer and supersedes and replaces any and all previous and contemporaneous communications, representations or agreements between the parties, whether oral or written, regarding transactions hereunder. No provision of this Agreement may be waived or modified except by an amendment signed by an authorized representative of each party.

10. GOVERNING LAW

This Agreement will be governed by the laws of New York, without regard to conflicts of law rules. Any litigation will be brought exclusively in a federal or state court located in the state or commonwealth where Customer's location identified above, and the parties consent to the jurisdiction of the federal and state courts located therein, submit to the jurisdiction thereof. The parties further consent to the exercise of personal jurisdiction.

11. DOCUMENT RETENTION

All documents related to this Agreement will be kept on file by both parties for a period of ten (10) years after the project completion in accordance with the rules of the SLP.

E-RATE PURCHASE AGREEMENT

Form – E-Rate FY27 2024-2025

Contract Number: 124045

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

CDW Government LLC

Rocky Point Union Free School District

(Authorized Signature)

(Authorized Signature)

Printed Name

Mrs. Jessica Ward

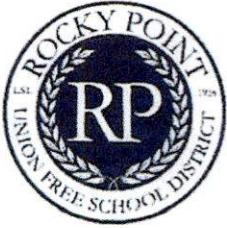
Printed Name

Title: _____

Title: *President, BOE*

Date: _____

Date: _____



ROCKY POINT UNION FREE SCHOOL DISTRICT
BUSINESS OFFICE
90 Rocky Point – Yaphank Road
Rocky Point, New York 11778

Telephone: (631) 744-1600

Fax: (631) 849-7558

Dr. Scott O'Brien
Superintendent of Schools

Christopher Van Cott
Assistant Superintendent for Business

02/06/2024

CDW Government
230 N Milwaukee Ave
Vernon Hills, IL 60061

Dear Andrew Magliola:

Thank you for your response to FORM 470 # 240006023. This letter will confirm Rocky Point Union Free School District's decision to purchase a maximum amount of \$7,146.96 for Category 2 UPS units during E-rate Fund Year 2024 as specified in the attached price quotation.

It is the intent of the Rocky Point Union Free School District to purchase these items between July 1, 2024 and September 30, 2025; however, the agreement expiration date for non-recurring services may be automatically extended to align with SLD authorized extensions due to late funding, changes in products, services approved after March 1, 2025, and/or for unforeseen delays with the district.

If the Schools and Libraries Division ("SLD"), Administrator of the Universal Services Support Mechanism, or its successor, should fail to approve all or any part of the services and products covered by this contract, Rocky Point Union Free School District shall have the right, at its option, to cancel this contract, as to that part of the services and products disallowed for discount pricing.

If, after approval of discount funding by SLD or its successor, Rocky Point Union Free School District's governing board should fail to approve all of or any part of the services and products covered by this contract, Rocky Point Union Free School District shall have the right, at its option, to cancel this contract as to that part of the services and products disallowed by the governing board.

It is understood substitutions may be ordered if agreed to in advance by both parties and that the district is not obligated to purchase all makes, models, or quantities listed on the quote. Orders are not approved until a Purchase Order has been issued. Please be advise, this E-rate award will be invoiced via the SPI method.

We look forward to working with CDW-G in the coming Fund Year.

Sincerely,

A handwritten signature in blue ink, appearing to read "C. Van Cott", is written over a light blue horizontal line.

Christopher Van Cott
Assistant Superintendent for Business



Thank you for choosing CDW. We have received your quote.

Hardware Software Services IT Solutions Brands Research Hub

QUOTE CONFIRMATION

CHRIS VAN COTT,

Thank you for considering CDW•G for your technology needs. The details of your quote are below. **If you are an eProcurement or single sign on customer, please log into your system to access the CDW site.** You can search for your quote to retrieve and transfer back into your system for processing.

For all other customers, click below to convert your quote to an order.

[Convert Quote to Order](#)

QUOTE #	QUOTE DATE	QUOTE REFERENCE	CUSTOMER #	GRAND TOTAL
NRHM739	12/14/2023	ERATE	476312	\$7,146.96

QUOTE DETAILS

ITEM	QTY	CDW#	UNIT PRICE	EXT. PRICE
6PK Smart USB 16GB A+ Flash-Led SmartConnect Best with Network Card	3	6645934	\$2,382.32	\$7,146.96
Mfg. Part: SMTL1500RM3UCNC				
Contract: Sourcewell 081419-NY K-12 (081419-CDW)				

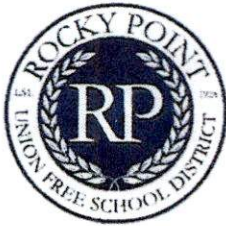
SUBTOTAL	\$7,146.96
SHIPPING	\$0.00
SALES TAX	\$0.00
GRAND TOTAL	\$7,146.96

PURCHASER BILLING INFO	DELIVER TO
Billing Address: ROCKY POINT UNION FREE SCHOOL DIST. DISTRICT OFFICE 90 ROCKY POINT YAPHANK RD ROCKY POINT, NY 11778-8957 Phone: (631) 744-1600 Payment Terms: ERATE QUOTES ONLY	Shipping Address: ROCKY POINT HIGH SCHOOL CANZANELLA/MANCINI 82 ROCKY POINT YAPHANK RD ROCKY POINT, NY 11778-8401 Shipping Method: DROP SHIP-GROUND
	Please remit payments to: CDW Government 75 Remittance Drive Suite 1515 Chicago, IL 60675-1515



Sales Contact Info

Andrew Magliola | (866) 873-9864 | andmag@cdw.com



ROCKY POINT UNION FREE SCHOOL DISTRICT
BUSINESS OFFICE
 90 Rocky Point – Yaphank Road
 Rocky Point, New York 11778

Telephone: (631) 744-1600

Fax: (631) 849-7558

Dr. Scott O'Brien
Superintendent of Schools

Christopher Van Cott
Assistant Superintendent for Business

AGENDA
ROCKY POINT PUBLIC SCHOOLS
BOARD OF EDUCATION MEETING
February 5, 2024

Reminder Regarding Public Comment:

- Speakers must present their license to Mrs. Crossan as they approach the podium to allow for their address to be recorded. Speakers will announce their name once at the podium.
- Public comment at meetings of the Board shall be restricted to civil discourse, free from disparaging remarks or inferences toward any person or organization. Speakers who fail to observe this protocol will be ruled out of order.
- A period of time not to exceed fifteen (15) minutes, unless extended at any given meeting by resolution of the Board, shall be provided prior to Board action on the agenda. Each speaker shall be limited to a maximum of three minutes. Speakers may not share, defer, or otherwise reallocate any or all of the three minutes afforded them.
- A period of time not to exceed thirty (30) minutes, unless extended at any given meeting by resolution of the Board, shall be provided subsequent to the completion of Board action on the agenda. Each speaker shall be limited to a maximum of three minutes. Speakers may not share, defer, or otherwise reallocate any or all of the three minutes afforded them.
- Speakers shall be ruled out of order if they attempt to speak about any specific student or employee, by name or title.

XIV E-Rate Award-CDW

BE IT RESOLVED, that upon the recommendation of the Superintendent of Schools, the Board of Education approves the Proposal for three APC Uninterruptible Power Supply units to CDW, at a pre-discounted amount of \$7,146.96, as per the attached. The District will utilize funding through the E-rate program to cover an estimated 60% of said costs via the Service Provider Invoice Method. Net cost paid to CDW by the District to be \$2,858.78.

E. Casswell M. Lisa 4-0; 1 Trustee Absent
 Motion _____ 2nd _____ Vote _____

Christopher A. Van Cott
 Assistant Superintendent for Business
(These are not official BOE minutes; certified as accurate by Asst. Supt.)

April 12, 2024

MUNICIPAL ADVISOR SERVICES AGREEMENT

THIS MUNICIPAL ADVISOR SERVICES AGREEMENT (the "Agreement") is entered into as of, May 21, 2024 (the "Effective Date") between the Rocky Point Union Free School District, ("District") and Munistat Services, Inc. ("Munistat") (collectively referred to herein as the "Parties").

RECITALS

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

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

AGREEMENT

NOW THEREFOR, the Parties agree as follows:

1. Municipal Advisory Services. The Parties hereto agree that Munistat shall provide those services set forth in the Work Orders. The District acknowledges and agrees that most tasks requested by the District will not require all services provided for in the Work Orders and, as such, the specific scope of services for such task shall be limited to just those services required to complete the task. Any material changes in or additions to the services described in the Work Orders shall be promptly reflected in an amendment to this Agreement and such amendment may be agreed to either in writing or electronically by email.
2. Term and Termination. This Agreement shall be effective as of the Effective Date and shall remain in effect until terminated by either party upon (30) days written notice; provided, however, that in the event of termination of any such engagement, Munistat reserves that right to assess fees for any work performed pursuant to a Work Order in accordance with the Fee Schedule set forth in **Appendix B**.
3. Agreement to Provide Information. The District agrees to provide Munistat with factual, not misleading information as shall be required by Munistat in furtherance of the services set forth herein, including financial statements, budgets, and other relevant documents. The District further agrees to not intentionally omit any material information relevant to Munistat's provision of services. Munistat agrees to promptly amend or supplement this Agreement to reflect any material changes or additions to this Agreement, including material changes to the information provided.
4. Compensation. Munistat shall receive a fee for any services rendered to the District pursuant to this Agreement in accordance with the fee schedule set forth in Appendix B attached hereto and incorporated herein by reference.

5. Indemnity. Each party shall defend, indemnify and hold harmless the other from and against any and all claims, demands, expenses, cost or causes, arising out of or in connection with any claim, suit, action, or proceeding for personal injury, death or property damage sustained or incurred as a result of any act, failure, or default by the other party's employee while acting within the scope of their duties as determined by this Agreement.

6. Required Regulatory Disclosures. Munistat is registered as a "Municipal Advisor" pursuant to Section 15B of the Securities Exchange Act and rules and regulations adopted by the United States Securities and Exchange Commission ("SEC") (Registration #867-00429) and the Municipal Securities Rulemaking Board ("MSRB") (Registration #K0114). As part of this SEC registration Munistat is required to disclose to the SEC information regarding criminal actions, regulatory actions, investigations, terminations, judgments, liens, civil judicial actions, customer complaints, arbitrations and civil litigation involving Munistat. Pursuant to MSRB Rule G-42, Munistat is required to disclose any legal or disciplinary event that is material to the District's evaluation of Munistat or the integrity of its management or advisory personnel. Munistat has determined that no such event exists. Copies of Munistat's filings with the United States Securities and Exchange Commission can currently be found by accessing the SEC's EDGAR system Company Search Page which is currently available at <https://www.sec.gov/edgar/searchedgar/companysearch.html> and searching for either "Munistat Services Inc." or for our CIK number which is 0001608472.

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

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

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

[Signature page follows]


SIGNATURE PAGE

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

**ROCKY POINT
UNION FREE SCHOOL DISTRICT**

MUNISTAT SERVICES, INC.

By: _____

By:  _____

Name: _____

Name: Noah Nadelson

Title: _____

Title: Chief Executive Officer

APPENDIX A

SERVICES

Munistat shall provide, upon request, services related to the issuance of debt, as applicable, and set forth below. The District acknowledges and agrees that most tasks requested by the District will not require all the services described below, and as such, the specific scope of services for such task shall be limited to those services required to complete the transaction. Any material changes in or additions to the scope of services described below shall be promptly reflected in an amendment to this Agreement.

For the TANs:

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

For the SEC Filing Requirement:

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

Bond Financings:

- Meet with appropriate District Officials to discuss plan of finance and establish the timeline.

Preparation of maturity and estimated debt service schedules for bond issues in accordance with Local Finance Law.
- We will assist the District with the preparation of the Official Statement, based on information provided by the District and/or third parties, including Bond Counsel for certain language relating to legal matters. Munistat will make no representation, warranty or guarantee regarding the accuracy of completeness of the information in the Preliminary Official Statement or Official Statement, and its assistance in preparing these documents should not be construed as a representation that it has independently verified such information.

- We distribute Official Statements and/or Notices of Sale to the investment community through various information repositories and post the documents on “Ipreo”, a third party, distribution and electronic bidding platform.
- If necessary, we submit requested documents and information to the rating agencies and, if we feel the situation warrants, we will make an appointment with a credit analyst in order to present our views regarding the District’s rating.
- Prior to the bond sale, we submit the required information to the CUSIP Service Bureau. It is generally the function of bond counsel and the underwriter to ensure that the bonds are printed in correct form and on a timely basis.
- For issues over \$5 million, we ensure the publication of the Notice of Sale for bond issues within the required time limits.
- For issues over \$5 million, we prepare the Debt Statement for certain bond issues and file it with the State Comptroller’s office.
- We handle the bid opening at our office and verify the calculation of the winning bid.
- We coordinate the financial details of the closing with the District, bond counsel, the underwriter, and the bond insurance company (if applicable).
- We coordinate the preparation of the Final Official Statement with the underwriter, bond counsel and, where applicable, the bond insurance company.
- We prepare the final Debt Service Schedule (and, where applicable, the apportionments of such overall Debt Service Schedule into the appropriate funds), and distribute copies of such schedules to the issuer, and bond counsel.

Note Financings:

- Meet with appropriate District Officials to discuss plan of finance and establish the timeline.
- We will assist the District with the preparation of the Official Statement, based on information provided by the District and/or third parties, including Bond Counsel for certain language relating to legal matters. Munistat will make no representation, warranty or guarantee regarding the accuracy of completeness of the information in the Preliminary Official Statement or Official Statement, and its assistance in preparing these documents should not be construed as a representation that it has independently verified such information.
- We distribute Official Statements and Notices of Sale to the investment community through various information repositories and post the documents on “Ipreo”, a third party, distribution and electronic bidding platform.
- Prior to the sale, we submit the required information to the CUSIP Service Bureau. It is generally the function of bond counsel and the underwriter to ensure that the bonds are printed in correct form and on a timely basis.
- We handle the bid opening at our office and verify the calculation of the winning bid.
- We coordinate the financial details of the closing with the District, bond counsel, the underwriter, and the bond insurance company (if applicable).

- We coordinate the preparation of the Final Official Statement with the underwriter, bond counsel and, where applicable, the bond insurance company.
- We prepare the computation of note interest and principal payment due (and, where applicable, the apportionments of such overall payments due into the appropriate funds), and distribute copies of such schedules to the issuer.

Lease financings:

- If appropriate, we assist the District in lease financings (energy performance contract, vehicle, LED lighting, etc.). Such services include but are not limited to: coordinate the collection of financial and operating information, verify and analyze the projected cash flows, draft the Request for Proposals, accept the bids via competitive public sale on the lease and help determine the award, prepare various estimated debt service schedules, determine amounts to be included in ensuing operating budgets, and coordinate the closing.

APPENDIX B

FEES AND EXPENSES

Tax Anticipation Notes and Annual Disclosure:

- The all-inclusive fee for our services will be \$9,000 (\$6,500 for the TAN's and \$2,500 for the SEC filing). The administrative and out-of-pocket costs, such as postage, word processing, overnight delivery charges, website posting, email distribution of Final Official Statements, state filings, submission of documents to ratings agencies and The Depository Trust Company, copies and scanning are included in the fees set forth above.

Additional Services (Bonds, Notes and Lease) if applicable:

- The fees for our services for capital project financings will *not exceed* the following: Serial Bonds and Energy Performance Contract Leases – Base fee of \$12,500 for each bond issue and \$1.00 per \$1,000 thereafter; Refunding Serial Bonds – Base fee of \$17,500 for each bond issue and \$1.85 per \$1,000 thereafter; Bond Anticipation Notes – Base fee of \$5,500 for each note and \$0.50 per \$1,000 thereafter. The fee for general consulting services will be billed hourly with the terms of the service agreed upon prior to the engagement.
- The fees for our services include all out-of-pocket expenses. Other normal issuing costs, such as bond counsel fees, rating agency fees and publication of resolutions and Notices of Sale are billed directly to the District by the respective parties.
- Munistat Services, Inc. will not charge to attend meetings of the Board, work sessions, meetings with bond counsel, ratings agencies, or any other meetings associated with a capital project. We do not charge any fees for services delivered prior to a referendum, including preparation of estimated debt service and tax rate impact schedules. There will be no charge until, and unless the closing of the bonds or notes take place.

APPENDIX C

DISCLOSURE OF CONFLICTS OF INTEREST

Fixed Fee

Under a fixed fee form of compensation, the municipal advisor is paid a fixed amount established at the outset of the transaction. The amount is usually based upon an analysis by the client and the advisor of, among other things, the expected duration and complexity of the transaction and the agreed-upon scope of work that the advisor will perform. This form of compensation presents a potential conflict of interest because, if the transaction requires more work than originally contemplated, the advisor may suffer a loss. Thus, the advisor may recommend less time-consuming alternatives, or fail to do a thorough analysis of alternatives. There may be additional conflicts of interest if the municipal advisor's fee is contingent upon the successful completion of a financing, as described below.

Contingent Compensation

Certain fees to be paid by the District to Munistat Services, Inc. are contingent on the size and successful closing of the transaction. Although this form of compensation may be customary, it presents a conflict because Munistat Services, Inc. may have an incentive to recommend unnecessary financings to the District. For example, when facts or circumstances arise that could cause the financing or other transaction to be delayed or fail to close, Munistat Services, Inc. may have an incentive to discourage consideration of alternatives that may result in the cancellation of the financing or other transaction.

Munistat Services, Inc. manages and mitigates these conflicts primarily by adherence to the fiduciary duty which it owes to municipal entities which require it to put the interests of the District ahead of its own.

Other Material Conflicts of Interest

Munistat Services, Inc. has determined, after exercising reasonable diligence, that it has no other known material conflicts of interest that would impair its ability to provide advice to the District in accordance with its fiduciary duty to municipal entity clients. To the extent any such material conflicts of interest arise after the date of this Agreement, Munistat Services, Inc. will provide information with respect to such conflicts in the form of a written amendment or supplement to this Agreement.

**AGREEMENT Between the
BOARD OF EDUCATION OF THE
ROCKY POINT UNION FREE SCHOOL DISTRICT
And
ROCKY POINT TEACHERS' ASSOCIATION**

This Agreement shall constitute a modification to the Collective Bargaining Agreement, dated July 1, 2020, through June 30, 2026. Except as set forth below, all other provisions of the Collective Bargaining Agreement shall remain unchanged.

The parties hereby agree that Appendix B, Section 4 A of the Collective Bargaining Agreement shall be amended by **deleting** the following three (3) stipend position:

4: Middle School/High School Clubs GROUP A		2024-2025	2025-2026
	Video Production Club –MS	N/A	N/A
	Fashion Club – MS	N/A	N/A
	Creative Writing Club - MS	N/A	N/A

The parties hereby agree that Appendix B, Section 1, Section 4A, and Section 5F of the Collective Bargaining Agreement shall be amended by adding seven (7) new stipend positions as follows:

5: JAE Clubs GROUP F		2024-2025	2025-2026
	Mentoring Program- JAE	\$1,306	\$1,322
	Robotics Club - JAE	\$1,306	\$1,322
4: Middle School/High School Clubs GROUP A		2024-2025	2025-2026
	Advisory Club –MS	\$1,306	\$1,322
	Beautiful Me Club – MS	\$1,306	\$1,322
	Board Games Club - MS	\$1,306	\$1,322
1: Music		2024-2025	2025-2026
	Treble Choir - HS	\$2,905	\$2,941
	Jazz Band (9-12) - HS	\$3,486	N/A

Dated: May 21, 2024

BOARD OF EDUCATION OF THE ROCKY POINT
UNION FREE SCHOOL DISTRICT

By: _____
Jessica Ward, President

Dated: May 21, 2024

ROCKY POINT
TEACHERS ASSOCIATION

By: _____
Stacy Iberger, President

AGREEMENT
made by and between
BOARD OF EDUCATION OF THE ROCKY POINT UNION FREE SCHOOL DISTRICT
and the
ROCKY POINT ADMINISTRATORS' ASSOCIATION
this 21st day of May 2024

This Agreement is for the purpose of compensating administrators who attend overnight fieldtrips during the 2023-2024 and 2024-2025 school years.

The parties agree that this Agreement shall not be precedent setting, nor binding subsequent to June 30, 2025. Moreover, the parties agree that this Agreement shall not be used and/or admitted into evidence in connection with any claim, litigation, arbitration, cause of action or proceeding of any kind and nature in any jurisdiction or forum, except as to enforce its terms.

Any RPAA member who attends a field trip that requires an overnight stay shall be paid \$600 per night.

Dated: May 21, 2024

BOARD OF EDUCATION OF THE ROCKY POINT
UNION FREE SCHOOL DISTRICT

By: _____
Jessica Ward, President

Dated: May 21, 2024

ROCKY POINT
ADMINISTRATORS ASSOCIATION

By: _____
Michael Gabriel, President

Rocky Point UFSD
Personnel Schedule for Board of Education Approval - 5/21/2024

5/21/2024 Schedule-A Classified Staff

Last	First	Position	Building	Rate	BOE Date	Amount	Effective Date	Description/Comments
Nunziata	Carrienne	Food Service Worker	FJC	N/A	5/21/2024	N/A	4/15/2024	Continuation of unpaid leave of absence for medical reasons from 4/15/2024 through 6/26/2024.
Fichera	Erin	Food Service Worker	HS	N/A	5/21/2024	N/A	4/15/2024	Resignation for personal reasons
Conforti	Amanda	School Lunch Monitor	JAE	N/A	5/21/2024	N/A	4/19/2024	Amended start date
Badamo	Ashley	Office Assistant	FJC	N/A	5/21/2024	N/A	6/30/2024	Resignation for personal reasons
Barr	Terry	Food Service Worker	MS	N/A	5/21/2024	N/A	4/19/2024	Resignation for personal reasons
Giordano	Robert	Food Service Worker	HS	Hourly-Step 0	5/21/2024	16.00	5/23/2024	Part-time (5 days per week, 4 hours per day) ten-month contractual appointment. Replaces G. Luppino.
Feldmann	Katelyn	School Hall Monitor	HS	N/A	5/21/2024	N/A	5/10/2024	Resignation for personal reasons
Staudt	Gale	School Teacher Aide	DW	Annual	5/21/2024	1,000.00	1/2/2024	Supplemental Student Assistance Stipend 2023-2024 school year for 1/2 day (.5); Salary pro-rated.
Barber	Marianne	School Teacher Aide	DW	N/A	5/21/2024	N/A	9/3/2024	Resignation for the purpose of retirement
Felicetti	Daniel	School Teacher Aide	DW	N/A	5/21/2024	N/A	5/24/2024	Resignation for personal reasons
La Rosa	Denise	School Lunch Monitor	JAE	N/A	5/21/2024	N/A	5/10/2024	Resignation for person reasons
Badal	Isabel	School Lunch Monitor	JAE	N/A	5/21/2024	N/A	5/15/2024	Unpaid leave of absence for personal reasons from 5/15/2024 through 5/17/2024.
Annicelli	Raymond	Custodial Worker I	DW	Annual-Step 0	5/21/2024	35,831.00	5/23/2024	Full-time, twelve-month probationary contractual appointment. Replaces A. Gebbia. Salary pro-rated.
Roman	Victor	Custodial Worker I	DW	Annual-Step 0	5/21/2024	35,831.00	5/23/2024	Full-time, twelve-month probationary contractual appointment. Replaces P. Murphy. Salary pro-rated.

Rocky Point UFSD
Personnel Schedule for Board of Education Approval - 5/21/2024

5/21/2024 Schedule-B Certified Staff

Last	First	Position	Bldg.	Rate	BOE Date	Amount	Effective Date	Description/Comments
Westerlund	Jason	Principal	FJC	N/A	5/21/2024	N/A	6/30/2024	Tenure
Bongiorno	Nicole	ELA/ENL Teacher	MS	N/A	5/21/2024	N/A	8/31/2024	Tenure
Williams	James	ENL Teacher	FJC	N/A	5/21/2024	N/A	8/31/2024	Tenure
Warren	Julianne	Elementary Education Teacher	FJC	N/A	5/21/2024	N/A	10/19/2024	Tenure
Bertone	Jocelyn	Speech Teacher	FJC	N/A	5/21/2024	N/A	8/31/2024	Tenure
Fisher	Sara	Elementary Education Teacher	JAE	N/A	5/21/2024	N/A	6/26/2024	Resignation for personal reasons
Steinberg	Nicole	ENL Teacher	JAE	N/A	5/21/2024	N/A	6/26/2024	Resignation for personal reasons
Brooks	Tesia	School Social Worker	MS	N/A	5/21/2024	N/A	6/17/2024	Unpaid FMLA leave of absence for the purpose of child care from June 17, 2024 through June 26, 2024.
Watkis	Jachan	Director of MST	DW	N/A	5/21/2024	N/A	6/30/2024	Termination of employment
Dugan	Erica	LOTE Teacher	MS	N/A	5/21/2024	N/A	6/26/2024	Resignation for personal reasons

Rocky Point UFSD
Personnel Schedule for Board of Education Approval - 5/21/2024

5/21/2024 Schedule-C Non-Teaching Substitutes

Last	First	Position	Bldg.	Rate	BOE Date	Amount	Effective Date	Description/Comments
DeGroot	Charlene	Sustitute School Nurse	DW	N/A	5/21/2024	N/A	5/6/2024	Inactivation of 2023-2024 appointment
La Rosa	Denise	Substitute Teacher Aide/Monitor	DW	Hourly	5/21/2024	16.00	5/11/2024	2023-2024 school year
Gustafson	Travus	Substitute Custodian	DW	Hourly	5/21/2024	16.00	5/23/2024	2023-2024 school year
LaCarrubba	Thomas	Substitute Custodian	DW	Hourly	5/21/2024	16.00	5/23/2024	2023-2024 school year

Rocky Point UFSD
Personnel Schedule for Board of Education Approval - 5/21/2024

5/21/2024 Schedule-D Teaching/Certified Substitutes

Last	First	Position	Bldg.	Rate	BOE Date	Amount	Effective Date	Description/Comments
Cugini	Janine	Substitute Teacher/Teaching Asst.	DW	Daily	5/21/2024	130.00 non preferred; 160.00 preferred	5/23/2024	2023-2024 school year
Amendola	Justin	Substitute Teacher/Teaching Asst.	DW	Daily	5/21/2024	130.00 non preferred; 160.00 preferred	5/23/2024	2023-2024 school year
DeRosa Padden	Nicole	Substitute Teacher/Teaching Asst.	DW	N/A	5/21/2024	N/A	5/2/2024 EOB	Inactivation of 2023-2024 appointment
Sofoklis	Samantha	Substitute Teacher/Teaching Asst.	DW	Daily	5/21/2024	130.00 non preferred; 160.00 preferred	5/23/2024	2023-2024 school year
Conti	Catherine	Substitute Teacher/Teaching Asst.	DW	Daily	5/21/2024	130.00 non preferred; 160.00 preferred	5/23/2024	2023-2024 school year
Prentice	Jeana	Substitute Teacher/Teaching Asst.	DW	Daily	5/21/2024	130.00 non preferred; 160.00 preferred	5/23/2024	2023-2024 school year

Rocky Point UFSD
Personnel Schedule for Board of Education Approval - 5/21/2024

5/21/2024 Schedule-E Co-Curricular Positions 2023/2024

Last	First	Position	Bldg.	Rate	BOE Date	Amount	Effective Date	Description/Comments
Ardolino	Lindsey	Additional Supervision	FJC	Hourly	5/21/2024	50.00	4/4/2024	Family Literacy Night. Not to exceed two (2) hours. 2023-2024 school year.
Hancock	Patricia	Additional Supervision	FJC	Hourly	5/21/2024	50.00	4/4/2024	Family Literacy Night. Not to exceed two (2) hours. 2023-2024 school year.
Williams	James	Additional Supervision	FJC	Hourly	5/21/2024	50.00	4/4/2024	Family Literacy Night. Not to exceed two (2) hours. 2023-2024 school year.
Lopez	Mara	Additional Supervision	JAE	Hourly	5/21/2024	50.00	4/4/2024	Family Literacy Night. Not to exceed two (2) hours. 2023-2024 school year.
Serpico	Gabriella	Additional Supervision	JAE	Hourly	5/21/2024	50.00	4/4/2024	Family Literacy Night. Not to exceed two (2) hours. 2023-2024 school year.
Steinberg	Nicole	Additional Supervision	JAE	Hourly	5/21/2024	50.00	4/4/2024	Family Literacy Night. Not to exceed two (2) hours. 2023-2024 school year.
Flanagan	Laura	Additional Supervision	HS	Hourly	5/21/2024	50.00	4/4/2024	Family Literacy Night. Not to exceed two (2) hours. 2023-2024 school year.
Anderson	Shayna	Additional Supervision	HS	Hourly	5/21/2024	50.00	4/4/2024	Family Literacy Night. Not to exceed two (2) hours. 2023-2024 school year.
Reilly	Thomas	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Tribby	Carly	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Sohngen	Danielle	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Serpico	Gabriella	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Nardiello	Cynthia	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Kistner	Christine	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Pina	Nancy	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Engellau	Jennifer	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Valvo	Denise	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Nobre	Anthony	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Capell	Daniel	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Eichler	Chester	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Tsavos	Jonathan	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Acritelli	Richard V.	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act

Firrello	Shannon	Summer Program Nurse	DW	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Nash	Raffaella	Summer Program Nurse	DW	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Rand	Jason	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Roviello-Meadows	Nyree	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Katsapis	Elicia	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Parker	James	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Lindsay	Scott	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Muratore	Kristina	High School Credit Recovery/Regents Test Prep/Proctoring/Grading Summer Program	HS	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Frank-Ziegler	Leslie	Summer Program Nurse	DW	Hourly	5/21/2024	71.00	7/1/2024	July 2024 -August 2024; Funded through the ARP Act
Nardiello	Cynthia	Curriculum Writing	HS	Hourly	5/21/2024	50.00	5/22/2024	15:1 ELA 9/10. Funded through the General Fund. Up to twenty (20) hours. Project completion by 6/15/2024.
Pina	Nancy	Curriculum Writing	HS	Hourly	5/21/2024	50.00	5/22/2024	15:1 ELA 9/10. Funded through the General Fund. Up to twenty (20) hours. Project completion by 6/15/2024.
Caselli	Katerina	NOCTI Cosmetology Performance Evaluator	DW	Hourly	5/21/2024	50.00	5/22/2024	2023-2024 school year

*Up to two hours: \$58.00; in excess of two hours: \$86.00; Junior/Senior Prom: \$58.00 per hour 2023/2024 school year

Rocky Point UFSD
Personnel Schedule for Board of Education Approval - 5/21/2024

5/21/2024 Schedule-F Community Education

Last	First	Position	Bldg.	Rate	BOE Date	Amount	Effective Date	Description/Comments