

**PORTAGE PUBLIC SCHOOLS  
BOARD OF EDUCATION  
COMMITTEE OF THE WHOLE WORK SESSION  
CENTRAL HIGH SCHOOL ROOM #1136, 8135 S. WESTNEDGE, PORTAGE, MICHIGAN 49002  
JUNE 13, 2022, 6:30 PM  
AGENDA**

**VISION STATEMENT**

An exceptional, continuously improving learning culture with high expectations, committed to all!

**MISSION STATEMENT**

Portage Public Schools will educate all students to achieve their potential.

<b>I. CALL TO ORDER AND PLEDGE OF ALLEGIANCE</b>	
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**PORTAGE PUBLIC SCHOOLS  
BOARD OF EDUCATION – COMMITTEE OF THE WHOLE WORK SESSION  
PORTAGE CENTRAL HIGH SCHOOL, ROOM #1136  
JUNE 13, 2022, 6:30 P.M.**

**Note Page**

**II. Revisions/Approval of Agenda**

**Recommended Motion:**

**Motion offered by \_\_\_\_\_, seconded by \_\_\_\_\_, that the Board of Education approve the Agenda as printed (or as amended).**



**Year Long K-8 Goals at PPS 2021-2022**  
Required under PA 48 Sections 98b/104a Goals 2021-2022

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*Initial Report:* September 15, 2021  
*Winter Update:* February 7, 2022  
*Spring Update:* June 1, 2022

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## Goals

### **K - 5 Goal**

80% of students meeting grade level benchmarks in Reading (Acadience) and Mathematics (Fastbridge) by the end of the 2021-2022 school year.

### **6 - 8 Goal**

80% of students demonstrating growth in Reading (NWEA) and Mathematics (NWEA) by the end of the 2021-2022 school year.

## Achievement and Growth by Grade Level

### **Elementary School: Fastbridge Math and Acadience Reading**

80% of students meeting grade level benchmarks by the end of the school year.

Grade	Math Percent of students meeting benchmark			Reading Percent of students meeting benchmark		
	Fall	Winter	Spring	Fall	Winter	Spring
K	81%	73%	71%	62%	78%	81%
1	74%	74%	70%	58%	64%	70%
2	75%	74%	70%	73%	75%	72%
3	77%	77%	71%	73%	73%	78%
4	64%	64%	66%	74%	76%	77%
5	62%	63%	64%	72%	76%	81%

- Data is not from a cohort (students can be in either data set to be counted)
- “Meeting Benchmark” changes by time of year for the curriculum based measure components of Fastbridge and for all of Acadience.

### **Middle School: NWEA Math and Reading**

80% of students demonstrating growth by the end of the school year.

Grade	Math		Reading	
	Percent of students with Growth from Fall to Winter	Percent of students with Growth from Fall to Spring	Percent of students with Growth from Fall to Winter	Percent of students with Growth from Fall to Spring
6	76%	86%	58%	61%
7	72%	81%	65%	64%
8	69%	80%	60%	58%

- Cohort based data (students must be in both data sets to be counted)
- Growth is an increase in the student RIT score (Rauch score) which is standardized throughout all grades.

## Achievement and Growth by Student Group

**Elementary School: Fastbridge Math and Acadience Reading**

80% of students meeting grade level benchmarks by the end of the school year.

Group Reporting on groups where 30 more students are present.	Math			Reading		
	Percent of students meeting benchmark			Percent of students meeting benchmark		
	Fall	Winter	Spring	Fall	Winter	Spring
All Students K-5	72%	71%	69%	69%	74%	77%
Econ. Disadvantaged	52%	51%	49%	53%	57%	60%
Special Education	33%	31%	24%	28%	33%	28%
English Learner	63%	63%	58%	61%	65%	66%
Female	68%	66%	64%	69%	74%	77%
Male	76%	75%	72%	69%	73%	76%
White	76%	75%	73%	71%	76%	79%
Afr Am/Black	41%	36%	34%	43%	47%	53%
Asian	82%	84%	80%	85%	87%	87%
Hispanic	64%	59%	55%	60%	66%	69%
Multiracial	66%	66%	66%	64%	75%	73%

**Middle School: NWEA Math and Reading**

80% of students demonstrating growth by the end of the school year.

Group Reporting on groups where 30 more students are present.	Math		Reading	
	Percentage of students showing growth from Fall to Winter	Percentage of students showing growth from Fall to Spring	Percentage of students showing growth from Fall to Winter	Percentage of students showing growth from Fall to Spring
All Students 6-8	73%	82%	61%	61%
Econ. Disadvantaged	70%	78%	65%	59%
Special Education	72%	78%	58%	57%
English Learner	79%	84%	65%	63%
Female	71%	83%	59%	60%
Male	74%	82%	63%	62%
White	72%	82%	60%	61%
Afr Am/Blk	74%	79%	64%	65%
Asian	72%	88%	62%	65%
Hispanic	75%	83%	64%	55%
Multiracial	72%	79%	62%	61%

Achievement or Growth by Mode of Instruction

**Elementary School: Fastbridge Math and Acadience Reading**

80% of students meeting grade level benchmarks by the end of the school year.

Group Reporting on groups where 30 more students are present.	Math			Reading		
	Percent of students meeting benchmark					
	Fall	Winter	Spring	Fall	Winter	Spring
All Students K-5	72%	71%	69%	69%	74%	77%
In-Person Students	72%	71%	69%	69%	74%	77%
Virtual Students	70%	73%	68%	66%	66%	72%

**Middle School: NWEA Math and Reading**

80% of students demonstrating growth by the end of the school year.

Group Reporting on groups where 30 more students are present.	Math		Reading	
	Percentage of students showing growth from Fall to Winter	Percentage of students showing growth from Fall to Spring	Percentage of students showing growth from Fall to Winter	Percentage of students showing growth from Fall to Spring
All Students 6-8	73%	82%	61%	61%
In-Person Students	73%	83%	61%	61%
Virtual Students	70%	72%	63%	60%

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**Note Page**

**IV. Board Education**

1. Elementary Site & Appearance Review



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**Note Page**

**VI. Consent Agenda**

1. Approval of Minutes
  - a. May 23, 2022 Policy Governance Retreat, Regular Business Meeting & Closed Session Minutes
  
  - b. NHS & CHS Student Trips  
That the Board of Education approve as presented the Northern High School Spanish Club 2023 student trip to Costa Rica and the 2024 student trip to Peru, as well as the Central High School French Club 2023 student trip to France and the 2023 Biology/Spanish student trip to Ecuador and the Galapagos Islands.
  
  - c. Staff Desktop Computer Purchase  
That the Board of Education authorize the purchase of 500 desktop computers from Presidio in an amount not-to-exceed \$202,500, the proceeds for which will be drawn from the 2021 Bond Fund.

June 13, 2022

**PORTAGE PUBLIC SCHOOLS  
BOARD OF EDUCATION**

**POLICY GOVERNANCE RETREAT &  
REGULAR BUSINESS MEETING  
MAY 23, 2022**

**POLICY GOVERNANCE RETREAT**

The Policy Governance Retreat of the Board of Education of Portage Public Schools held on Monday, May 23, 2022, was called to order at 4:00 p.m. by President Van Antwerp. The meeting was held in Conference Room #1 of the Administration Building.

Board Trustees Present: Keith Crowell, Kurt Droppers, Rusty Rathburn, Bo Snyder, Celeste Shelton-Harris, Randy Van Antwerp

Board Trustees Absent: Terri Novaria

Executive Leadership Present: Mark Bielang, Superintendent; Michael Pascoe, Assistant Superintendent of Instruction; Johnny Edwards, Assistant Superintendent of Operations; Dan Vomastek, Director of Information and Technology Systems; Jeanine Mattson-Gearhart, Director of Special Education; Michelle Karpinski, Community Relations Manager; Mike Huber, Director of Curriculum & Professional Development; Kelly Jensenius, Director of Elementary Instruction; Brad Galin, Director of Human Resources; Paula Johnson, Director of Finance

Others Present: Gary Goscenski of Perspectives Consulting

**REVISIONS/APPROVAL OF AGENDA**

**Motion offered by Mr. Droppers, seconded by Mr. Rathburn, that the Board of Education approve the agenda as printed.**

**The motion carried unanimously.**

**COMMENTS OR COMMUNICATIONS**

There were no comments.

**DISCUSSION ITEMS**

Mr. Gary Goscenski of Perspectives Consulting facilitated the discussion portion of the agenda, which covered location/streaming of board meetings, elementary facility design schedule, Schools of Choice, federal funding, and DVT values-declaration statement-equity.

The Policy Governance Retreat adjourned at 6:18 p.m.

## **REGULAR BUSINESS MEETING**

The Regular Business Meeting of the Board of Education of Portage Public Schools held on Monday, May 23, 2022, was called to order at 6:30 p.m. by President Van Antwerp. The meeting was held in Room #1136 of Portage Central High School. The Pledge of Allegiance was recited.

Board Trustees Present: Keith Crowell, Kurt Droppers, Terri Novaria, Rusty Rathburn, Bo Snyder, Celeste Shelton-Harris, Randy Van Antwerp

Board Trustees Absent: None

## **REVISIONS/APPROVAL OF AGENDA**

**Motion offered by Mr. Droppers, seconded by Mr. Snyder, that the Board of Education approve the agenda as amended to remove the District Goals Report, move the student trip discussion items to the Superintendent's Report section of the agenda, and add as a discussion item, Revision to Policy 3.12.**

**The motion carried unanimously.**

## **REPORTS**

### **Superintendent's Report**

#### **Bond Project Update**

Mr. Johnny Edwards, Assistant Superintendent of Operations provided an update on bond construction work.

For the 2015 Bond, a request for quotes (RFP) will go out tomorrow for the high school auditorium. Bids will close on June 7, 2022. The scope of the project includes upgrading the sound systems, rebuilding stage floors, modernizing the lighting work network infrastructure and architectural controls, replacing conventional lighting with LED, and replacing multi-media projectors.

For the 2021 Bond, we've reached the Schematic Design Final Page/Review. The TowerPinkster & Fielding team provided us with a detailed narrative for Civil & Landscape, Architecture, Structural system, Mechanical system, Electrical system, Technology, and Food Service. Over the next two weeks, O-A-K will provide us with an estimate of the cost for the buildings. If both buildings fall within the budget as is, then can proceed into Design Development. If the preliminary costs are not within our budget, then we make adjustments accordingly to stay within the budget.

Along with Schematic design, we will meet with the city of Portage to share our preliminary plans for CEL and HAV. This is a collaborative effort to discuss our timeline, site logistics, and codes we must adhere to. We also want to know the city's plans for any construction near or around CEL and HAV.

Mr. Edwards also reviewed a bond enhancement list, which includes projects we are actively pursuing or that are in progress.

## **Financial Report**

Ms. Paula Johnson, Director of Finance, shared highlights from the General Fund Budget Progress Report by Function and by Object for the ten-month period ending April 30, 2022 compared to the same period last year.

Ms. Johnson also provided a brief update on the state's budget development. Things are looking good on the revenue side. The legislature hopes to finalize the budget before the end of June.

## **Other**

Per Superintendent Bielang, the recent grand opening of the new Portage Community Senior Center was well attended. Attendees included Governor Whitmer and Congressman Fred Upton. This is a wonderful new facility, which our community is fortunate to have.

## **NHS Student Trip to Costa Rica and Trip to Peru**

Ms. Heather Canenguez, Spanish teacher at Northern High, reviewed details of the June 2023 proposed student trip to Costa Rica and the June 2024 trip to Peru.

## **CHS Student Trip to France**

Ms. Rachel Flachs, French teacher at Central High, went over the planned student trip to France in June 2023. Ms. Flachs pointed out this will be a joint trip between Central High and Northern High.

## **CHS Student Trip to Ecuador & Galapagos Islands**

Plans for the June 2023 student trip to Ecuador and the Galapagos Islands were detailed by Central High teachers Ms. Cathy Laurencig (Science) and Ms. Bonnie Moss (Spanish).

Trustees shared positive comments regarding all of these proposed trips and the opportunities they provide to your students.

## **COMMENTS OR COMMUNICATIONS**

President Van Antwerp opened the floor to public comment. Dr. Shelton-Harris read the guidelines for public participation.

Jada Blake addressed the Board regarding white washing and racism in the classroom and referenced the book *To Kill a Mockingbird* by Harper Lee.

Reverend Gy Ludvig-McCartney thanked the Board for facilitating equity work in the district and offered suggestions for expanding that work.

Sarah Baker thanked Superintendent Bielang and Trustees Van Antwerp and Shelton-Harris for attending the new Portage Community Senior Center ribbon-cutting event and to Trustee Rathburn

for making a gift in honor and memory of educational leader Rocky Rathburn. She also thanked Trustees Snyder and Rathburn for coming to a community gathering on the values journey. She informed the Board that Representative Christine Morse will hold a town hall meeting on school safety on May 26 at 6:00 p.m. in the Schrier Park Building in Portage.

President Van Antwerp thanked the public commenters for their remarks and opened the floor to board member comments.

Dr. Shelton-Harris shared positive comments regarding the IB ceremonies she attended at Northern High and Central High.

Mr. Rathburn thanked Sarah Baker for her work on the new Senior Center and thanked PPS staff for their work, particularly in educating his son, who just completed his senior year.

Mr. Crowell shared his enthusiasm for the return of student trips abroad.

Mrs. Novaria commented on the special impact educators have on students and the positive reconnection her own child had with former teachers.

Mr. Snyder thanked the public commenters for their remarks and his colleagues for a good Policy Governance Retreat today, and expressed support for the return of student field trips.

Mr. Van Antwerp shared positive remarks regarding the IB ceremonies and this special time of year when we celebrate student accomplishments.

## **CONSENT AGENDA**

**President Van Antwerp presented the following Consent Agenda items for approval by the Board of Education: the May 9, 2022 Committee of the Whole Work Session minutes; that the Board of Education approve the renewal of Chartwells Food Service Management contract for the 2022/23 school year and authorize the Director of Finance to execute the contract renewal agreement; that the Board of Education authorize the purchase of two switches from Dell Technologies in an amount not-to-exceed \$39,406, the proceeds for which to be drawn from the 2021 Bond Fund; and that the Board of Education authorize the purchase of 1550 Chromebooks from Sehi Computer Products in an amount not-to-exceed \$409,773.50, the funds for which to be drawn from ESSER, 11T, and the 2022/23 General Fund as needed.**

**There being no objections, the motion carried.**

## **REQUIRED ACTION ITEMS**

### **KRESA 2022-23 General Fund Budget**

**Motion offered by Mr. Crowell, seconded by Mrs. Novaria, that the Board of Education adopt the resolution provided, indicating support of the KRESA General Education Fund Budget for the 2022-23 school year, as presented.**

**The motion carried unanimously.**

## **ACTION ITEMS**

### **Set Budget Hearing**

**Motion offered by Mr. Snyder, seconded by Mr. Droppers, that the Board of Education set a public hearing on the proposed 2022-23 budget for June 27, 2022 at 6:30 p.m. and authorize the Board Secretary to publish the required notice in the Kalamazoo Gazette.**

**The motion carried unanimously.**

### **Set Special Meeting re: Superintendent Evaluation**

**Motion offered by Mrs. Novaria, seconded by Mr. Crowell, that the Board of Education set a special meeting for the Superintendent Evaluation for June 27, 2022 at 4:30 p.m.**

**The motion carried unanimously.**

## **DISCUSSION ITEMS**

### **Staff Desktop Computer Purchase**

Mr. Dan Vomastek, Director of Information and Technology Systems, reviewed his recommendation to purchase 500 desktop computers to replace computers that are now end of life.

### **Spring 2022 Staff Chromebook Purchase**

Mr. Dan Vomastek detailed the recommendation to purchase 700 staff Chromebooks to replace existing units and requested this item be moved to action.

**Motion offered by Mr. Droppers, seconded by Mrs. Novaria, to move the Spring 2022 Staff Chromebook Purchase discussion item to action.**

**The motion carried unanimously.**

**Motion offered by Mr. Snyder, seconded by Mrs. Novaria, to authorize the purchase of 700 Chromebooks from Sehi Computer Products in an amount not-to-exceed \$437,500, funds being drawn from ESSER and the 2021 bond funds.**

**The motion carried unanimously.**

### **Revision to Policy 3.12**

Per President Van Antwerp, the Policy Committee recently met to review the superintendent evaluation instrument included in Policy 3.12. Revisions were made to the instrument to reflect changes that were approved by the Board on October 25, 2021 to Policy 1.0 – Global Ends.

The Board opted to move this discussion item to action.

**Motion offered by Mr. Droppers, seconded by Dr. Shelton-Harris, to move the Revision to Policy 3.12 discussion item to action.**

**The motion carried unanimously.**

**Motion offered by Mr. Snyder, seconded by Mrs. Novaria, to approve the revisions to Policy 3.12, as presented.**

**The motion carried unanimously.**

#### **Closed Session**

**Motion offered by Mrs. Novaria, seconded by Mr. Droppers, that the Board of Education move into closed session for the purpose of discussing collective bargaining strategy, as allowed under the Open Meetings Act 15.268, Section 8(c).**

**The motion carried unanimously.**

The Board remained in Room #1136 for the closed session, which began at 7:24 p.m. The Board returned to open session at 7:48 p.m.

#### **Post-Closed Action**

**Motion offered by Mr. Snyder, seconded by Dr. Shelton-Harris, that the Board of Education approve the 2022-2024 Collective Bargaining Agreement with the Portage Bus Driver's Association, MEA/NEA.**

**The motion carried unanimously.**

With no further business to come before the Board, the meeting was adjourned at 7:49 p.m.

Respectfully submitted,

Barb Atkinson, Recording Secretary

RESOLUTION FOR LOCAL DISTRICT VOTE ON ISD GENERAL FUND BUDGET

Kalamazoo Regional Educational Service Agency ("ISD")  
GENERAL EDUCATION FUND BUDGET  
RESOLUTION

A Regular Business meeting of the Board of Education of the Portage Public School District was held at Portage Central High School in Room #1136 on May 23, 2022, at 6:30 p.m.

Members present were: Keith Crowell, Kurt Droppers, Terri Novaria, Rusty Rathburn, Bo Snyder, Celeste Shelton-Harris, Randy Van Antwerp

The following preamble and resolution were offered by Member Crowell and seconded by Member Novaria.

WHEREAS:

This Board received the Kalamazoo Regional Educational Service Agency General Education Fund Budget on or before May 1, 2022; and

WHEREAS:

In accordance with Section 380.624 of the Revised School Code, this Board must now adopt a resolution expressing its support or disapproval of the proposed ISD budget, and must submit to the ISD Board any specific objections and/or proposed changes the Board may have to the budget prior to June 1, 2022.

THEREFORE, BE IT RESOLVED THAT:

Based upon the information received from Kalamazoo Regional Educational Service Agency and recognizing that a limited review of a budget document provides limited oversight of the financial affairs of an organization, the ISD General Education Fund Budget for the 2022-2023 school year be supported, and that the Secretary of the Board is hereby directed to submit a copy of this Resolution to the Secretary of the ISD Board of Education, along with any specific objections or proposed changes to the budget.

Ayes: Members Rathburn, Droppers, Crowell, Shelton-Harris, Van Antwerp, Novaria, Snyder

Nays: None


Motion declared adopted.

June 13, 2022

Janet Johnstone  
*Coordinator of Instructional Services*  
Phone: 269.323.5140  
fax: 269.323.5141  
[jjohnstone@portageps.org](mailto:jjohnstone@portageps.org)

**TO:** Mark Bielang

**DATE:** May 3, 2022

**FROM:** Janet Johnstone/Dr. Michael Pascoe 

**SUBJECT:** Northern High School 2023 field trip to Costa Rica

**RECOMMENDATION:**

I recommend the approval for the Portage Northern High School Spanish Club to travel to Costa Rica, as described in the attached material. The trip dates are set for June 19-26, 2023. **The current travel advisory is to exercise increased caution. It is recommended that attention be paid to the safety of this region prior to travel.**

**BACKGROUND:**

Heather Cañenguez is proposing a student trip to Costa Rica for June 19-26, 2023. They will spend 8 days out-of-state. The purpose is for students to use Spanish in real world situations to develop insight into the nature of language and culture in order to communicate and interact with cultural competence and participate in multilingual communities at home and around the world. The families involved will be responsible for the cost. The students will not miss any instructional time. Chaperones will be a ratio of approximately 1 adult to every 6 students (number attending: Approx. 12-36 Portage students, 2-6 adults).

I have reviewed this proposal and support it.

JJ/MP  
Attachments

The primary purpose of school-approved student trips is to provide substantive curricular, co-curricular, and extracurricular enhancement not available in the local setting. It is not the intent of Policy #2340/AG #2340A to establish annual travel opportunities. Recognizing this purpose, consideration of trip approval begins with an evaluation of the special nature of the enrichment activities and the relationship of the trip's education goals to the curricular, co-curricular, or extracurricular activity.

If this trip requires **Portage PS transportation**, the form should be received by the transportation office **at least two (2) weeks** prior to the date of the trip. To allow for approval at all levels, it is recommended that this form be submitted **at least 3 weeks in advance**.

An itinerary must be submitted with any out-of-state overnight trip.

**International Trips:** If any duration of this trip is spent out of the country, the request needs to be submitted with **at least four (4) months' notice** to provide sufficient time to obtain all levels of approval. Please note that you may be asked to present your educational trip request to the Portage Board of Education for approval and no fundraising may begin until BOE approval is received.

SECTION 1					
School	NHS	Group	Spanish Club	Date of Request	4/22/2022 10:46:49
Start Date	Mon. 6/19/2023	End Date	Mon. 6/26/2023	Amount of Instructional Time Lost	0
Departure Time from School	7:00:00 AM	Return Time to School	9:00:00 PM	PPS Transportation?	No
Bus Loading/Van Pickup Time		Departure Time from Destination		ASN:	
Additional Details for Driver/Transprt. Dept.					

SECTION 2
<b>Trip Destination:</b> Costa Rica
<b>Educational Goal(s)/Purpose of Trip:</b> Communication: Using Spanish in real world situations with native speakers Cultures: experience and interact with cultural competence Comparisons: Develop insight into the nature of language and culture in order to interact with cultural competence Communities: Communicate and interact with cultural competence in order to participate in multilingual communities at home and around the world
<ul style="list-style-type: none"> <li>■ WSI-2021-Travel-Partner-DEC UpdateMarch.pdf</li> <li>■ WS INTL Terms and Conditions.pdf</li> <li>■ Earn Academic Credit International.pdf</li> </ul>

SECTION 3					
# of Students	12-36 depends on how many sign up	# of Staff Chaperones	1 for every six that sign up	# of Additional Adult Chaperones	0
# of Buses		# of Lift Buses		# of Vans	
Estimated Cost per Student	\$2,500	Funds Provided by	Private/Family, Fundraising		
Estimated Cost of Trip	\$2500 per student	Amount per Funding Source			

Electronically complete sections below

**SUPERVISOR/PERSON OVERSEEING TRIP**

<b>Name</b>	Heather Cañenguez	<b>Contact Phone #</b>	269-967-3639
Electronic Signature: <i>(employee overseeing trip needs to electronically sign below)</i> x Heather Cañenguez		Date: 4/22/2022	

**Reminders: Forward to/Share with your principal for approval & attach any additional documentation if applicable (i.e., itineraries, Benchmarks/Standards, Travel company contracts, etc.). Notify food services if trip conflicts with lunch**

**Office Use ONLY:**

Principal Decision:	<input checked="" type="checkbox"/>	Approve	Principal Signature: <i>(electronically sign name below, or add e-signature)</i> x Jim French	Date: <i>(enter below)</i> 4-25-2022
	<input type="checkbox"/>	Deny		
Superintendent (or designee) Decision:	<input type="checkbox"/>	Approve	Supt. (or Designee) Signature: <i>(electronically sign name below, or add e-signature)</i> X	Date: <i>(enter below)</i>
	<input type="checkbox"/>	Deny		

<b>Date Received by Transportation:</b>		<b>Received by:</b>	
---	--	---------------------	--

**Assignment: Provided 1-5 days prior to trip**

Bus #:	<input type="text"/>	Driver:	_____	Bus #:	<input type="text"/>	Driver:	_____
Bus #:	<input type="text"/>	Driver:	_____	Bus #:	<input type="text"/>	Driver:	_____
Bus #:	<input type="text"/>	Driver:	_____	Bus #:	<input type="text"/>	Driver:	_____
Bus #:	<input type="text"/>	Driver:	_____	Bus #:	<input type="text"/>	Driver:	_____

Routing: Teacher signs, forwards email to Principal. Principal signs, forwards to [jjohnstone@portageps.org](mailto:jjohnstone@portageps.org). Inst Serv forwards to Transportation as needed



## Service-Learning: Heredia, Costa Rica

[educationaltravel.com/Canenguez-6746](http://educationaltravel.com/Canenguez-6746)

June 19 - June 26, 2023

### Day 1 Hola San Jose

Meet your resident director and travel to Heredia  
Heredia city walk  
Health & safety program orientation  
Begin homestay  
Daily reflection and group discussion  
Overnight in homestay

### Day 2 Heredia

Begin service-learning project  
Pizza party dinner  
Overnight in homestay

### Day 3 Heredia

Service-learning project continues  
Doka Coffee Plantation tour  
Overnight in homestay

### Day 4 Heredia

Service-learning project continues  
Artisan open-air market visit  
Dance lesson  
Overnight in homestay

### Day 5 Heredia

Service-learning project continues  
Dairy farm visit  
Overnight in homestay

### Day 6 Heredia--Arenal

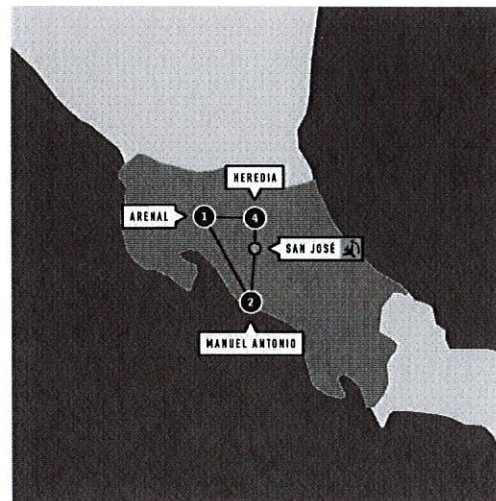
End homestay  
Travel to Arenal  
Baldi Hot Springs visit  
Overnight in hotel

### Day 7 Arenal--Heredia

Canopy zip line tour  
Travel to Heredia  
Overnight in homestay

### Day 8 End tour

End homestay  
Recognize perspectives and communicate ideas



# Reserve your spot!

MyTrip ID: Canenguez-6746

Registration deadline: May 31, 2022

## What's included

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We provide everything you need for a remarkable trip:

- Round-trip airfare and other transportation described in the itinerary
- Traveler Assistance, Medical Insurance & Travel Insurance
- Three college credits upon completion of on-line course (grades 9-12 eligible)
- 6 overnight stays in homestays with local families
- 1 overnight stay in centrally located three- or four-star hotel
- Three nourishing home-cooked meals provided by host family during homestays
- Daily breakfast and hearty dinner daily during hotel stays
- Full time, multilingual, WorldStrides resident director
- Local guide at sites and on city tours as described in the itinerary
- Entrances and transportation to sites and activities described in your itinerary
- Local guide and local bus driver tips
- 24/7 On Tour Emergency Support
- Note: On arrival day only dinner is provided; on departure day, only breakfast is provided
- Note: Tour cost does not include airline-imposed baggage fees, any required passport or visa fees, or optional excursions. Optional excursions, or other individual/group customizations will be listed as separate line items in the total trip cost, if included.

## Tour investment

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Students (travelers under the age of 23): \$2,497

Adults (age 23 and over): \$2,937

Price reflects savings of \$200 scholarship. Sign up by 5/31/2022 and enter code Travel4H in order to take advantage of this limited-time offer!

### Automatic monthly payment plan

Pay just \$99 upon enrollment and the balance will be divided into equal monthly payments, charged automatically to your credit card or checking account. As of May 03, 2022, your monthly payment would be just \$199.83.

## Travel protection

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We recommend covering your educational investment with one of our two comprehensive travel protection plans offered through Trip Mate. For details, visit [worldstrides.com/travel-protection-plans](http://worldstrides.com/travel-protection-plans).

Enroll online,  
by phone, or by mail



Visit [educationaltravel.com/Canenguez-6746](http://educationaltravel.com/Canenguez-6746)



SCAN ME

Use Canenguez-6746 to register



1.800.771.5353



Mail in your paper application to:

WorldStrides Programs  
Attn: Participant Services  
PO Box 9033  
Charlottesville, VA 22906-9033

## GENERAL TERMS BEFORE WE GET STARTED

### Important Information

By registering for this program, you are agreeing to participate in a full-service group educational travel experience, operated by Lakeland Tours LLC dba WorldStrides, or one of our affiliate businesses. Because of the unique nature of group travel, many elements of your program and itinerary may be selected and/or scheduled at the direction of your group's Program Leader (the teacher, administrator, or parent from your school or community), who will act as your group's representative. Further, please note that, while WorldStrides and its affiliates will arrange the various travel elements for your trip, the total price quoted for your program includes additional pre-trip services, including but not limited to the development of the associated educational content and materials, the printing and distribution of program materials, the costs associated with our various group health and safety measures, and the administrative and service costs related to group management.

### Waiver & Release

All participants must agree to a signed Participant Release and Binding Arbitration Agreement at the time of registration. This form can be viewed and agreed to during online registration, or printed, signed, and returned to WorldStrides via email to: [customerservice@worldstrides.org](mailto:customerservice@worldstrides.org) or by mail to: PO Box 9033, Charlottesville, VA 22906.

## FLEXIBLE PAYMENT OPTIONS

We provide you with options and flexibility to make our educational experiences more accessible.

### What are your payment options?

**1) Monthly Automated Payments:** Pay your deposit and optional travel protection plan costs with credit/debit card or checking account upon enrollment, and the balance of your Tour Fee will be automatically charged to your card or debited from your account in equal monthly installments until 35 days prior to your departure date (checking account) or 65 days prior to your departure date (credit/debit card). Please note that you must make all payments by credit card, debit card, or checking account. If two consecutive payments are returned NSF or declined by your bank or credit card company, we will change your account to the designated Manual Plan.

**2) Pay in Full:** Pay in full at the time of enrollment.

**3) 4-Step Manual Payments:** Pay your deposit and travel protection plan costs upon enrollment, \$500 toward your Tour Fee 30 days later, and 75% of your remaining balance at 110 days prior to departure. The final remaining balance is due 65 days prior to departure and can be paid by check, credit or debit card, or checking account. If you enroll 150 days prior to departure or later, you will make only three payments—deposit and travel protection plan costs at enrollment, 75% of your remaining balance at 110 days prior to departure, and the final balance at 65 days prior to departure. Please note that we do not automatically deduct payments on this plan; you must make each payment manually.

All full-paying participants, including participants who have previously traveled, are required to pay a deposit upon enrollment. Any participant who has already paid the deposit for a previous tour will receive a \$100 credit on your account.

Your account must be paid in full by the final payment deadline or your account will be subject to cancellation.

### What if you're late on a payment?

**Late Registration, Late Payment, and Fees:** WorldStrides charges a late registration charge of \$145 if enrollment is less than 110 days before departure. If you are late on any payment, you will be subject to a \$50 late payment fee. No personal checks or business checks will be accepted after the final payment deadline. Only certified check, money order or credit card payments will be accepted. There is a \$35 service charge on returned checks, declined credit cards or declined e-checks. A \$200 fee may apply for any name changes made within 85 days of departure. A \$50 fee, plus any additional airfare costs, will be assessed if you cancel your reservation and choose to re-instate at a later date.

**Waitlist:** Your program space is not guaranteed until your account has been paid in full and you have been advised in writing that all conditions for travel have been satisfied. If you are placed on a waitlist due to late registration or an outstanding account balance after final payment date your account must clear waiting list procedures and may involve additional airline and other charges.

## What do you need to know about your program fees?

The price quoted is based upon a minimum number of travelers. The price quoted is also subject to adjustment if the minimum enrollment is not met, if the program content or itinerary changes, or in the event of circumstances beyond WorldStrides' direct control. Your group may be combined with other group(s) on the program to reach minimum. The combinations may not be of the same age level or have the same itinerary. If the Program Leader chooses not to be combined and travels with less than the minimum number of participants, an additional cost will be charged to your account.

**Non-Refundable Fees:** The fee for enrollment in a Trip Protection Program (discussed below), your deposit, any handling charges, merchandise fees, fees for returned checks, fees for declined credit cards or electronic drafts, late payments, and registration fees are not refundable under any circumstances.

## What is not included in your program fees?

Unless specifically stated in your program, WorldStrides' program prices do not include college credit fees, passport fees, visa fees, trip protection fees, baggage charges, portage at airports and hotels, gratuities to guides or bus drivers, private or small group fee, expenses incurred during free time, optional excursions, trip extensions, local transportation to unscheduled activities, transportation from your home to the origination point of the program, overnight lodging and meals prior to departure or upon return from a program or the weekend supplement if your departure or return flight falls on a Friday, Saturday or Sunday (not applicable to tours to the United States, Canada or Puerto Rico).

**Adult Supplements:** Adults are automatically placed in twin rooms unless a single room upgrade is requested and available for the required additional applicable fee(s). Depending on the selected tour type, adult groups may be combined with student groups. In addition to the twin or single room fee, adults pay a supplement fee of \$125.

# EXPLORE BEYOND THE CLASSROOM!

## Program Information

Prior to departure, you will receive details regarding flight and hotel information, departure and return times, packing tips, drop-off/pick-up locations, etc. Flight times, airlines, itineraries, tour leader(s), and hotel information are subject to change. This is especially true when participating in a tournament or event, where WorldStrides is subject to the program hosts' schedule, accommodations, and transportation.

## Protecting You on Tour

While on tour, all participants are provided with accident, illness, and accident-related dental insurance coverage to cover out-of-pocket costs beyond the participant's own insurance. This insurance covers up to \$7,500 for accident, \$1,500 for illness, and \$750 for accident-related dental. Pre-existing conditions are not covered. Any charges not covered are the responsibility of the participant. Other limitations may apply. Full details are available at [www.tripmate.com/wpF369W](http://www.tripmate.com/wpF369W).

Please note, participants are solely responsible for their pre-program, program, and post-program medical care in all respects, including, but not limited to, obtaining and taking necessary medication(s), vaccinations, and any other medical care and treatment.

## Age Restrictions for Young Travelers

We do not accept applications for travelers under the age of 6 at time of departure. Registration for children 12 and under is subject to individual review, and the decision to allow participation in a trip is at the sole discretion of WorldStrides.

## Travel Documentation

Every participant is responsible for obtaining the required documentation necessary prior to departure, such as a valid passport, visa, transit visas, notarized parental consent form (if applicable), and any required travel insurance coverage. Secure flight data (including name and birthdate) must fully match the information provided to WorldStrides for inclusion on travel documentation and airline tickets, and must meet any other applicable compliance requirements issued by the Transportation Security Administration or related agencies. WorldStrides provides online and customer service to keep the program participant's information current and it is the participant's sole responsibility to assure that this information is fully up to date no later than 85 days prior to the group's departure date. If changes occur after that date, the participant must contact customer service and additional change fee will apply. Visit the Transportation Security Administration website at [www.tsa.gov](http://www.tsa.gov) for more information.

If a participant is unable to travel due to the lack of a proper identification, passport or visa, or necessary inoculations, the standard cancellation policy will apply. Reservations are not transferable at any time.

## Course Credit

Because WorldStrides holds various accreditations, participants may qualify for course credit for participation in a WorldStrides program. Schools, colleges, and universities hold varying policies regarding a student's eligibility to earn or redeem course credit from other accredited institutions. Students should consult their school guidance counselors and/or school policy handbooks to determine their eligibility. WorldStrides is not responsible for the approval or issuance of course credit.

## Optional Accommodations for Individuals and Groups

Participants may upgrade to a twin or single room for an additional fee upon availability. All participants aged 22 and younger at time of departure room in same-gender rooms in triple or quad rooming with travelers from the entire group. Minors, under the age of 18, are not able to room by themselves. Alternatively, your Program Leader may select a custom or "Exclusive Rooming" option, which ensures that students from your group will not be mixed with students from other groups during hotel stays.

**Tour extensions:** For the majority of WorldStrides' programs tour extensions must be booked at the time of enrollment, must apply to the entire group, and any changes will incur additional charges. All tour extensions are based on the agreed upon paying participants. If there are fewer than participants enrolled on a tour extension, WorldStrides reserves the right to add a surcharge or cancel the tour extension at its discretion.

**Stay-ahead and stay-behind:** If the entire group would like to arrive at the first destination a few days earlier or stay at the final destination a few days later than the scheduled tour, WorldStrides can change your airline tickets. The service fee is \$50 per participant, plus additional costs for land arrangements, which will be passed along to the participants. This optional tour enhancement requires a minimum of 10 paying participants. If an individual participant would like to opt to stay ahead or behind your scheduled tour, WorldStrides can arrange the airline ticket for a service fee of \$145 if requested upon enrollment. If requested after enrollment and up to 110 days prior to departure, the fee is \$195. We will change your airline ticket and you are responsible for all accommodations, meals, and transfers before and after the scheduled tour. Because we will arrange your airline tickets separately from your group's, we cannot guarantee that you will share any of the same flights, and additional fees may apply.

**Land-only:** Some Program Leaders may opt for the group to arrange for your own airline tickets and begin your tour at the first hotel at destination. You are solely responsible for transport to/from airports, including the ground transport to meet/depart from the group. For some of our tours, individual participants may opt to arrange your own airline tickets and join the group at the hotel at the first overseas destination your tour fee will reflect the discounted land only rate. You may select this option upon enrollment or up to 110 days before departure and thereafter additional fees may apply. This option is not available less than 90 days before departure. Land only participants are responsible for their own airline tickets and airport transfers. If a participant books airfare prior to the trip being confirmed by an Account Manager, WorldStrides is not responsible for any flight reimbursements/refunds.

**Optional excursions:** On the majority of our international programs we offer a number of optional activities pre-negotiated with our overseas suppliers. For most optional activities you can enroll online up to 110 days prior to your departure date, and you can enroll over the phone for most excursions up to 45 days prior to departure. After that date, you can register on a space-available basis only during the tour itself. All optional excursions are based on the agreed upon paying participants. If there are fewer paying participants enrolled on an optional excursion, WorldStrides reserves the right to add a surcharge or cancel the optional excursion at its discretion.

**Alternate departure airport:** Depart from an airport different from your fellow group members. You pay the Tour Fee from the alternate airport, plus a service fee of \$145 if requested up to 130 days before departure. If requested between 129-90 days before departure, the fee is \$195. This option is not available less than 90 days before departure. Additional fees may apply, and your alternate airport must be one of Worldstrides' gateways.

If you are traveling outside of WorldStrides scheduled tour dates, the participant is responsible for all associated costs. WorldStrides is not responsible for participants when they are not part of WorldStrides organized activities, during deviations and/or stay-ahead/stay-behind optional periods, and any time that the activities do not include the services of a WorldStrides Tour Director.

**Frequent Flyer Miles:** Frequent flyer miles are not available to participants.

## Personal Property

Participants are fully responsible for any costs arising from the damage, loss, or theft of any personal property during the program.

## Travelers with Disabilities

WorldStrides happily welcomes all travelers on our tours. However, the trips are fast paced, require a great deal of walking, and can be physically demanding. Due to these restrictions, you may not be able to fully participate in the tour. Furthermore, WorldStrides is not responsible for any denial of service by carriers, hotels, restaurants, and other independent suppliers, and cannot refund the cost of any activity in which you were unable to participate. We encourage that any disability requiring special attention be reported to the Program Leader and WorldStrides at the time you make your reservation. WorldStrides will make reasonable attempts to accommodate special needs. Travelers requiring extraordinary assistance must be accompanied by a paying companion who is capable of and totally responsible for providing the necessary assistance.

## Special Dietary Requirements

WorldStrides cannot be responsible for accommodating any food allergies, or dietary requirements and restrictions, and is not responsible for any problems associate with food or drink, including allergies. Dietary requirements and restrictions are the sole responsibility of the participant.

## Supervision/Behavior

WorldStrides, the Program Leader, and chaperones establish behavior rules and directions for all student participants. Failure to abide by the rules or directions may result in the student being sent home at the parents' expense without any right to a refund. All program participants will be responsible for their own actions at all times, and the Program Leader and chaperones will be held accountable for the action of all participants in their group.

Consumption or possession of alcoholic beverages or drugs of any kind for which you do not have a valid prescription, behavior infringing upon the ability of others to enjoy the Program, or compromising your own or others' safety, or is otherwise inappropriate, or violates the law as well as violation of certain other rules, constitute grounds for immediate expulsion from the tour.

WorldStrides is committed to providing an environment that is free from harassment. Harassment based upon an individual's sex, race, ethnicity, national origin, age, religion or any other legally protected characteristics will not be tolerated.

On occasion, program participants may be allowed by the Program Leader to leave the group and to explore on their own. WorldStrides has no responsibility for participants when they are on their own and it is the sole responsibility of those participants to take whatever actions are necessary to rejoin the group, at their own cost. If a program participant is late in appearing for a scheduled departure, the Program Leader has no duty to delay the Program to wait for the participant.

## What happens if your program changes after registration?

**Program Changes Made by WorldStrides:** Changes or substitutions in hotels, itinerary, inclusions, or airports may be made depending on your travel dates, arrival and departure times, national holidays, and events beyond WorldStrides' control at the discretion of WorldStrides as it deems necessary or desirable. Changes in itinerary, including reversing the itinerary, changes to the order in which cities or countries are visited, the duration of the stay in each city, addition and omission of cities or countries may occur. On certain dates some attractions or activities may be closed, and the availability of some venues advertised or communicated cannot be guaranteed. Some venues may require special equipment. Venues may also close without prior notice due to public holidays, festivals and routine maintenance. In these instances, no refunds can be given. Whenever possible, suitable alternatives will be provided.

WorldStrides reserves the right to change the date of departure by no more than two days from the original departure date in spring (Oct-Apr) and three days in the summer (May-Sept). These changes are not grounds for cancellation without penalty or for refunds after the tour.

On occasion, WorldStrides must change dates of a scheduled program by more than 3 days as the result of Exceptional Circumstances, as defined below, or as a result of operational challenges or difficulties, including without limitation, travel restrictions, event cancellations, facility closures, government-imposed restrictions/closures, or other reasons beyond the control of WorldStrides.

Should WorldStrides need to change the destinations visited and/or the dates of a scheduled program by more than 3 days, we will work with your group's Program Leader to reschedule your trip to dates that work for your group. If you elect to cancel because your program dates are changed by more than 3 days, the policy regarding Cancellation due to Exceptional Circumstances may apply.

**Changes Made by Your Group:** WorldStrides offers its WorldClass Flex Program to enable groups to plan trips with confidence. We understand your group may need to change your trip due to unforeseen circumstances. If your group decides they are not comfortable traveling to the planned destination or on the scheduled dates, the group can move the trip to an alternative destination or move to a new future date up until 60 days before departure. Changing the destination or date of the trip will be determined based on availability of trip components including, but not limited to, accommodations, venues, attractions, content, meals, and transportation. We will work with your Program Leader to find an alternative future date up to 24 months from your original departure date. Your group will be able to adjust your trip with no additional fees, just the difference (if applicable) in the price of the new trip.

In the event a tour is moved to the future, all monies paid (less any Non-Refundable Fees) can be transferred from an existing participant to a new participant if the new participant enrolls (which enrollment will include express agreement to these Terms and Conditions) by 110 days before departure. Once funds are transferred, the new participant is subject to the full Terms and Conditions and standard refund policies as defined for the group on the original scheduled trip.

If you or your group reschedules to a new destination or date and then decides to cancel, the cancellation fees will be calculated from the date of transfer from the original tour and standard cancellation fees will apply.

For departures from cities with multiple airports within a reasonable distance, WorldStrides will book flights interchangeably between the airports.

## What if you have to cancel your registration?

All cancellations must be made in writing by the person listed on the registration form to your account representative or customer service at [customerservice@worldstrides.org](mailto:customerservice@worldstrides.org) or via mail to WorldStrides, P.O. Box 9033, Charlottesville, VA 22906-9033, must be postmarked prior to the group's departure, and must include account number, registrant's name, and complete address.

The Program Leader may cancel the program on behalf of the entire group, or any individual participant. Within 24 hours following receipt of your registration confirmation or initial payment invoice (whichever is first), you may cancel your WorldStrides program and receive a full refund. After 24 hours, the Standard Cancellation Policy applies unless the Full Refund Program is purchased.

All refunds are issued using the original form of payment on the account. Check refunds are only issued to the primary responsible party listed on the account. WorldStrides accepts payment via check, e-check, debit card, and credit card. Should you choose to use a gift and/or preloaded credit card to make one or more payments on your WorldStrides account, WorldStrides is not responsible for replacing any credits that are successfully processed back to any lost, stolen, or destroyed gift or preloaded credit card account used for payment.

**Standard Cancellation Policy:** The services and value we provide begin long before your date of departure, and there are significant unrecoverable costs as your departure date approaches. Therefore, if you do not enroll in the Cancel for Any Reason Plan and you, the Program Leader, school, or school administration cancel beyond the 24-hour grace period, WorldStrides will be entitled to retain (in addition to the Non-Refundable Fees):

- \$399 non-refundable fee if more than 150 days
- \$599 non-refundable fee if between 150-110 days
- 50% of all fees + \$99 non-refundable fee if between 109-76 days
- 75% of all fees + \$99 non-refundable fee if between 75-31 days
- 100% if 30 days or less

**Cancellation due to Exceptional Circumstances:** If your group is unable to reschedule your trip to a new destination or date, and your program is canceled or cannot be delivered due to Exceptional Circumstances (explained below), travelers who did not purchase the Cancel for Any Reason Plan, will be refunded all monies paid less Non-Refundable Fees and an additional cancellation fee of \$399 for trips involving international air travel, \$289 for trips involving domestic air travel, or \$149 for trips involving domestic bus travel. After August 2021, cancellation fees for non-purchasers of Cancel for Any Reason Plan will be \$499 for international air travel, \$389 for domestic air travel, and \$189 for domestic bus travel. Please note – these fees are not intended to be a penalty, but rather a fair estimation of a portion of the unrecoverable internal and external costs related to planning, managing, and administering a full-service group travel program, that are incurred by WorldStrides prior to the date of departure.

**Exceptional Circumstances:** Without limitation, WorldStrides, including its affiliates, owners, officers, agents, employees or any associated organization, is not responsible for any injury, loss, or damage to person or property, death, delay, overbooking or downgrading of accommodations, mechanical or other failure of airplanes or other means of transportation or for any failure of any transportation mechanism to arrive or depart timely, dangers associated with animals, sanitation problems, food poisoning, lack of or quality of medical care, illness or disease, difficulty in evacuation in case of a medical or other emergency, or for any other inconvenience beyond the direct control of WorldStrides, in connection with the provision of any goods or services whether occasioned by or resulting from, but not limited to, Exceptional Circumstances. Exceptional Circumstances may also justify postponement or (if postponement is not achievable) cancellation of trips. Exceptional Circumstances include, but are not limited to, acts of force majeure, war (whether declared or not), criminal or terrorist activities of any kind or the threat thereof, civil unrest, strikes or other restrictive labor activities, illness or disease, actual, perceived or threatened epidemics or pandemics, government-imposed travel restrictions or closures, and other events outside WorldStrides' control that make performance of a trip as contemplated impossible or impractical.

## PROTECTING YOUR INVESTMENT

**Through Trip Mate, our third-party travel protection plan provider, WorldStrides offers two great plans that help protect your educational travel investment.**

**Travel Protection Plan:** Trip Mate's standard travel protection plan covers you for the following events:

- A traveler's injury, sickness, or death of a family member
- Theft of passport or visas
- Flight cancellations due to strike or bad weather
- Loss of luggage and personal effects
- Trip cancellation or trip interruption due to covered reasons such as a covered sickness, illness, injury or death
- Trip cancellation or trip interruption due to terrorist acts, as defined

**Ultimate Protection Plan:** Along with providing you all the same benefits as our Standard Travel Protection Plan, the Ultimate Protection Plan also includes a Cancel For Any Reason Waiver Benefit.

With our Cancel For Any Reason Waiver Benefit, if you cancel your trip for any reason not otherwise covered by this policy, we will reimburse you for 75% of the non-refundable cancellation fees which apply to your trip, provided:

- 1) Payment for this plan is received by WorldStrides within 14 days of your initial deposit/payment for your trip; and
- 2) You cancel your trip 48 hours (2 days) or more before your scheduled trip departure date.

This Cancel For Any Reason Waiver Benefit does not cover: 1) penalties associated with any air or other travel arrangement not provided by WorldStrides; or the failure of WorldStrides to provide the bargained-for travel arrangements due to cessation of operations. The Cancel For Any Reason Waiver Benefit is provided by WorldStrides itself and is not an insurance product. It must be purchased within 14 days of your initial payment for your trip.

For more information, visit [worldstrides.com/travel-protection-plans](https://worldstrides.com/travel-protection-plans).

For the Description of Coverage online, view the policy details at <https://www.tripmate.com/wpUF380H>.

The cost for the Travel Protection Plan is \$149. This plan should be purchased at the time of enrollment, and cannot be refunded once selected. The cost for the Ultimate Protection Plan is \$249. This plan should be purchased at the time of enrollment, and cannot be refunded once selected.

**USTOA Membership Means You're Protected:** WorldStrides, as an Active Member of USTOA, is required to post \$1 million with USTOA to be used to reimburse, in accordance with the terms and conditions of the USTOA Travelers Assistance Program, the advance payments of WorldStrides' customers in the unlikely event of WorldStrides' bankruptcy, insolvency, or cessation of business. Further, you should understand that the \$1 million posted by WorldStrides may be sufficient to provide only a partial recovery of the advance payments received by WorldStrides. Complete details of the USTOA Travelers Assistance Program may be obtained by writing to USTOA at 275 Madison Avenue, Suite 2014, New York, New York 10016, or by e-mail to [information@ustoa.com](mailto:information@ustoa.com) or by visiting their website at [www.ustoa.com](http://www.ustoa.com).

## GENERAL INFORMATION

**Third-Party Providers:** Lakeland Tours, LLC d/b/a WorldStrides, its employees, shareholders, subsidiaries, affiliates, officers, directors, successors, agents, and assigns (collectively, "WorldStrides") does not own, operate or control any person or entity which is contracted to or does provide goods or services for your trip, including, for example, lodging facilities, airline, vessel or other transportation companies, guides or guide services, local ground operators, entertainment or sightseeing operators, providers or organizers of optional excursions, food service providers, etc. All such persons and entities are independent contractors. As a result, WorldStrides is not liable for any negligent or willful act or failure to act of any such person or entity, or of any third party. Further, WorldStrides is not liable for any inconvenience, costs, losses, or damages associated with the denial of services or special requirements of services imposed by such person or entity, or of any third party.

Participants traveling on tours that include a Greek cruise should refer to the Carrier's Conditions of Carriage (which govern the legal relationship between the passenger and the carrier), at this page: [www.celestialcruises.com/en/conditions-of-carriage](http://www.celestialcruises.com/en/conditions-of-carriage)

**Arbitration:** Any dispute concerning these Terms & Conditions and/or any other matter concerning the trip, including, but not limited to, any events and circumstances occurring during the trip, shall be resolved exclusively by binding arbitration in Charlottesville, Virginia, according to the then existing commercial rules of the American Arbitration Association. Such proceedings will be governed by substantive (but not procedural) Virginia law. The arbitrator and not any federal, state, or local court or agency shall have exclusive authority to resolve any dispute relating to the interpretation, applicability, enforceability, conscionability, or formation of this Agreement, including but not limited to any claim that all or any part of this Agreement is void or voidable. By accepting these Terms and Conditions, you are irrevocably, unconditionally, and expressly submitting to binding arbitration, in lieu of having any such dispute decided in a court of law before a jury.

**Privacy:** Because the nature of our business requires coordination with various providers who deliver the travel services, it is necessary to share some personal information from time to time. For more information, please visit: [worldstrides.com/privacy-policy](http://worldstrides.com/privacy-policy).

### Seller of Travel Registrations:

- Hawaii TARS-5388; IA 568; and WA 601 887 646, 602 011 744.
- California Seller of Travel Registration No: 2041618-20. Note: Registration as a seller of travel does not constitute approval by the state of California. WorldStrides' principal office is located in Charlottesville, VA. This transaction is not covered by the California Travel Consumer Restitution Fund. You are not eligible to file a claim against that Fund in the event of WorldStrides' default. These Term and Conditions apply to the maximum extent permissible without violating individual applicable state laws; to the extent state law invalidates any provision, all provisions not invalidated by state law will remain in force.

Please note: A participant will not be allowed to travel on a WorldStrides tour if his/her name does not appear on the travel roster on the day of departure, or if he/she has not submitted a signed waiver and release form, emergency medical release form, or personal behavior contract. By registering for a WorldStrides trip, and making an initial deposit, participants and/or persons listed on the account are agreeing to and consenting to these Terms and Conditions. If you do not understand any of the foregoing Terms and Conditions, or if you have any questions or comments, please contact WorldStrides Customer Support at 1-800-468-5899.

# A Partner You Can Rely On

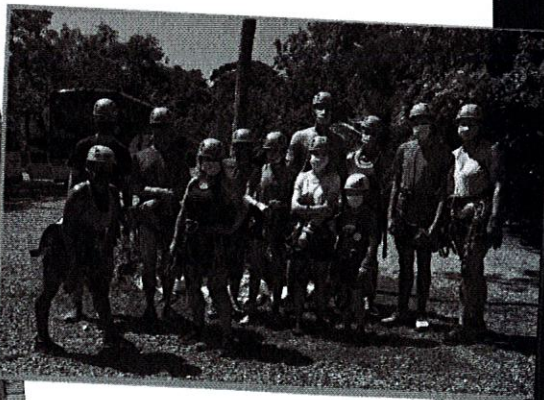
In 2021 alone, we supported tens of thousands of travelers around the world. For more than 50 years, WorldStrides has been the trusted educational travel partner of more than 9 million travelers, and our industry-leading commitment to health and safety speaks for itself. Expecting the unexpected is where we excel.

## Tackling the new normal

Traveling today looks different than it did a few years ago, and that's why working with a trusted organization is more important than ever. Our team is relentlessly committed to providing fun, educational experiences that never sacrifice peace of mind. All aspects of every program are reviewed, from the initial planning stages to the on-tour experience, and the health and safety of our participants is our top priority every step of the way.

## Evolving Standards

Our team is continually evaluating and updating our protocols based on current CDC guidance and the recommendations of our Doctors on Call Team from The George Washington University Department of Emergency Medicine. Led by Dr. Neal Sikka, who also serves as WorldStrides' Medical Director, our Doctors on Call Team is an interdisciplinary group with access to experts from public health, infectious disease, and laboratory services (testing).



Check out additional traveler photos and testimonials here:  
[worldstrides.com/travel-gallery](https://worldstrides.com/travel-gallery)



**WorldStrides**  
Educational Travel & Experiences

## A Proven Track Record

**92,427**

Number of 2021 travelers  
since January 2021

**0.19%**

Percentage of travelers  
with confirmed positive  
cases on program

**0.16%**

Percentage of travelers  
testing positive during  
pre-travel screening

*"I was comforted to know that WorldStrides kept on top of all COVID protocols... When our school leader sent group photos, I could tell they were on a trip of a lifetime."*

-Claudia, Parent, June 2021

*"The trip was highly anticipated... They [the students] had missed out on so much already! This trip was everything! One that will never be forgotten."*

-Kelly, Parent, June 2021

# We're with you every step of the way

## Pre-Tour

All participants are required to provide proof of a negative COVID-19 test in order to travel. If their test is positive, we work with them on options for future travel. A Safety Briefing is conducted for all participants to share travel tips and best practices for staying healthy, and our Top Travel Safety Tips help students learn about safety in a series of short, fun videos.

## On-Tour

We've refined every piece of the itinerary from hotel selection and meals to motorcoach protocols and flexible rooming options. If a student experiences symptoms, we safely separate them from the rest of the group and arrange testing. If the test result is positive, we're there every step of the way.

## Post-Tour

Our team goes above and beyond by offering support for any group with participants who become ill during the 14 days after returning home. In the event a participant tests positive, our team supports teachers in contact tracing and notifications as needed.

## WorldClass Flexibility

Change your tour dates or destination, no questions asked. Up to 60 days prior to departure.

- No change fees, just the difference (if applicable) in the price of the new trip.
- Travelers may transfer their spot to new participants up until 110 days before the new departure date.
- Additional Terms & Conditions apply.

## Special COVID-19 Flexibility for Groups and Individuals

If closures, government regulations, or travel restrictions due to COVID-19 prevent WorldStrides from delivering your tour, the group's Program Leader can postpone or move the tour with no fees associated. Anyone who has to cancel may transfer their spot to a new participant up until 110 days before the new departure date or will pay only a modest cancellation fee of \$399 for international tours, \$289 for domestic air tours, or \$149 for domestic bus tours.

Learn more at [worldstrides.com/travel-with-confidence](https://worldstrides.com/travel-with-confidence)

*"I had one of the greatest times of my life. I learned a lot and had a fun time with my friends. I would highly recommend taking the opportunity to participate in this trip experience if you have the chance."*

-Nicholas, Student, Traveled May 2021

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## Earn Academic Credit – International

Students! You can register for **Discovery for Credit** coursework before, during, or after the travel portion of the program. Courses consist of the travel portion of the program combined with an online course. Most assignments are designed to be completed after travel, since they ask that you incorporate much of what you learned during the field experience. We encourage you to log on before travel, if time permits, to get a feel for the course and explore its components. There is a 6-month deadline from the return date of travel to complete all online assignments.

Upon successful completion and the processing of credits, a transcript may be ordered directly from WorldStrides or George Mason University. Transcripts can be submitted to school registrars for consideration or attached separately to college applications or résumés. Students and educators should check with receiving institutions with regard to credit transfer policies.

WorldStrides holds accreditation through multiple regional agencies, including both corporate-level and school-level accreditation through Cognia (formerly AdvancED). This enables our traveling students to earn academic credit in conjunction with travel programs.

## Types of Academic Credit

### High School Credit

Students who are in grades 6-12 at the time of travel on WorldStrides programs are eligible to enroll in courses to earn high school credit at no additional cost. Courses vary in theme, content, and length based on the travel destination. For in-depth descriptions of courses applicable to your program and to register, go to your MyTrip page and click on the Academic Credit banner.

### College Credit

Students who are in grades 9-12 at the time of travel on WorldStrides programs are eligible to enroll in courses to earn college credit in conjunction with our university partnership with George Mason University at no additional cost. Courses vary in theme, content, and length based on the travel destination. For in-depth descriptions of courses applicable to your program and to register, go to your MyTrip page and click on the Academic Credit banner.



[worldstrides.com](http://worldstrides.com)



## Available Courses

Our experience working with successful students in our courses informs our recommendation for choosing the course level that's best for you. These guidelines are quite flexible!

- Global Perspectives 0.5 credit high school
- Global Perspectives 1 CR college
- Global Perspectives 3 CR college

- Students in 6<sup>th</sup>-9<sup>th</sup> grade are likely going to enjoy and be successful in the high school course.
- Students in 9<sup>th</sup>-11<sup>th</sup> grade are likely going to need to weigh their comfort working in a self-paced environment and choose between high school credit or the 1-credit college course.
- Students in 10<sup>th</sup>-12<sup>th</sup> grade are likely going to need to weigh the amount of time they can dedicate to their online studies and their experience with advanced coursework as they choose between the 1-credit and the 3-credit college courses.

## How to Register


1. Visit your MyTrip page
2. Click the Academic Credit banner
3. Select your course
4. If you have questions, please email us at [discovery@worldstrides.com](mailto:discovery@worldstrides.com).

## Academic Credit

Access your online coursework >



Janet Johnstone  
*Coordinator of Instructional Services*  
Phone: 269.323.5140  
fax: 269.323.5141  
[jjohnstone@portageps.org](mailto:jjohnstone@portageps.org)

**TO:** Mark Bielang  
**DATE:** May 3, 2022  
**FROM:** Janet Johnstone/Dr. Michael Pascoe   
**SUBJECT:** Northern High School 2024 field trip to Peru

**RECOMMENDATION:**

I recommend the approval for the Portage Northern High School Spanish Club to travel to Peru, as described in the attached material. The trip dates are set for June 19-29, 2024. **The current travel advisory is to exercise increased caution. It is recommended that attention be paid to the safety of this region prior to travel.**

**BACKGROUND:**

Heather Cañenguez is proposing a student trip to Peru for June 19-26, 2024. They will spend 11 days out-of-state. The purpose is for students to use Spanish in real world situations to develop insight into the nature of language and culture in order to communicate and interact with cultural competence and participate in multilingual communities at home and around the world. The families involved will be responsible for the cost. The students will not miss any instructional time. Chaperones will be a ratio of approximately 1 adult to every 6 students (number attending: Approx. 12-36 Portage students, 2-6 adults).

I have reviewed this proposal and support it.

JJ/MP  
Attachments

The primary purpose of school-approved student trips is to provide substantive curricular, co-curricular, and extracurricular enhancement not available in the local setting. It is not the intent of Policy #2340/AG #2340A to establish annual travel opportunities. Recognizing this purpose, consideration of trip approval begins with an evaluation of the special nature of the enrichment activities and the relationship of the trip's education goals to the curricular, co-curricular, or extracurricular activity.

If this trip requires **Portage PS transportation**, the form should be received by the transportation office **at least two (2) weeks** prior to the date of the trip. To allow for approval at all levels, it is recommended that this form be submitted **at least 3 weeks in advance**.

An itinerary must be submitted with any out-of-state overnight trip.

**International Trips:** If any duration of this trip is spent out of the country, the request needs to be submitted with **at least four (4) months' notice** to provide sufficient time to obtain all levels of approval. Please note that you may be asked to present your educational trip request to the Portage Board of Education for approval and no fundraising may begin until BOE approval is received.

**SECTION 1**

<b>School</b>	NHS	<b>Group</b>	Spanish Club	<b>Date of Request</b>	4/22/2022 11:49:14
<b>Start Date</b>	Wed. 6/19/2024	<b>End Date</b>	Sat. 6/29/2024	<b>Amount of Instructional Time Lost</b>	0
<b>Departure Time from School</b>	9:00:00 AM	<b>Return Time to School</b>	9:00:00 PM	<b>PPS Transportation?</b>	No
<b>Bus Loading/Van Pickup Time</b>		<b>Departure Time from Destination</b>		<b>ASN:</b>	
<b>Additional Details for Driver/Transprt. Dept.</b>					

**SECTION 2**

**Trip Destination:** Peru

**Educational Goal(s)/Purpose of Trip:**

Communication: Using Spanish in real world situations with native speakers  
 Cultures: experience and interact with cultural competence  
 Comparisons: Develop insight into the nature of language and culture in order to interact with cultural competence  
 Communities: Communicate and interact with cultural competence in order to participate in multilingual communities at home and around the world

- WSI-2021-Travel-Partner-DEC UpdateMarch.pdf
- WS INTL Terms and Conditions.pdf
- Earn Academic Credit International.pdf

**SECTION 3**

<b># of Students</b>	12-36 depending on sign up	<b># of Staff Chaperones</b>	1 for every 6 students	<b># of Additional Adult Chaperones</b>	0
<b># of Buses</b>		<b># of Lift Buses</b>		<b># of Vans</b>	
<b>Estimated Cost per Student</b>	\$4,300	<b>Funds Provided by</b>	Private/Family, Fundraising		
<b>Estimated Cost of Trip</b>	\$4,300	<b>Amount per Funding Source</b>			

Electronically complete sections below

**SUPERVISOR/PERSON OVERSEEING TRIP**

<b>Name</b>	Heather Cañenguez	<b>Contact Phone #</b>	2699673639
Electronic Signature: <i>(employee overseeing trip needs to electronically sign below)</i> x Heather Cañenguez		Date: 4/22/22	

**Reminders: Forward to/Share with your principal for approval & attach any additional documentation if applicable (i.e., Itineraries, Benchmarks/Standards, Travel company contracts, etc.). Notify food services if trip conflicts with lunch.**

**Office Use ONLY:**

Principal Decision:	<input checked="" type="checkbox"/>	Approve	Principal Signature: <i>(electronically sign name below, or add e-signature)</i> x Jim French	Date: <i>(enter below)</i> 4/25/2022
	<input type="checkbox"/>	Deny		
Superintendent (or designee) Decision:	<input type="checkbox"/>	Approve	Supt. (or Designee) Signature: <i>(electronically sign name below, or add e-signature)</i> X	Date: <i>(enter below)</i>
	<input type="checkbox"/>	Deny		

<b>Date Received by Transportation:</b>	<b>Received by:</b>
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**Assignment: Provided 1-5 days prior to trip**

Bus #:	<input type="text"/>	Driver: _____	Bus #:	<input type="text"/>	Driver: _____
Bus #:	<input type="text"/>	Driver: _____	Bus #:	<input type="text"/>	Driver: _____
Bus #:	<input type="text"/>	Driver: _____	Bus #:	<input type="text"/>	Driver: _____
Bus #:	<input type="text"/>	Driver: _____	Bus #:	<input type="text"/>	Driver: _____

Routing: Teacher signs, forwards email to Principal. Principal signs, forwards to [jjohnstone@portageps.org](mailto:jjohnstone@portageps.org). Inst Serv forwards to Transportation as needed



## Service-Learning: Cuzco, Peru

[educationaltravel.com/Canenguez-9710](http://educationaltravel.com/Canenguez-9710)

June 17 - June 27, 2024

Day 1 Hola Lima

Day 2 Lima

Day 3 Lima--Aguas Calientes

Day 4 Aguas Calientes--Ollantaytambo

Day 5 Ollantaytambo--Cuzco

Day 6 Cuzco

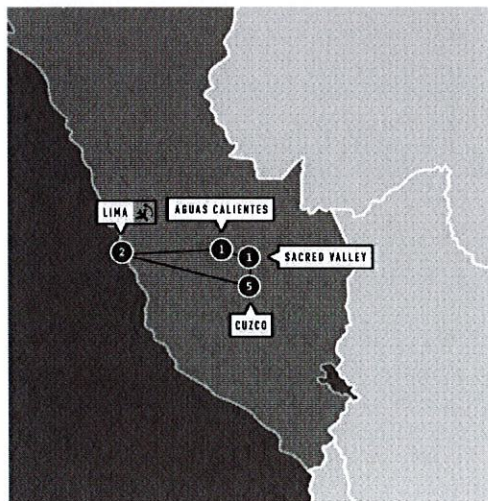
Day 7 Cuzco

Day 8 Cuzco

Day 9 Cuzco

Day 10 End tour

Day 11 Return home



# Reserve your spot!

MyTrip ID: Canenguez-9710

Registration deadline: May 31, 2022

## What's included

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We provide everything you need for a remarkable trip:

- Round-trip airfare and other transportation described in the itinerary
- Traveler Assistance, Medical Insurance & Travel Insurance
- Three college credits upon completion of on-line course (grades 9-12 eligible)
- 5 overnight stays in homestays with local families
- 4 overnight stays in centrally located three- or four-star hotels
- Three nourishing home-cooked meals provided by host family during homestays
- Daily breakfast and hearty dinner daily during hotel stays
- Full time, multilingual, WorldStrides tour director who is LEAP-trained in experiential education
- Local guide at sites and on city tours as described in the itinerary
- LEAP! Learning through Exploration and Active Participation; trademarked immersive approach of learning by doing
- Entrances and transportation to sites and activities described in your itinerary
- Local guide and local bus driver tips
- 24/7 On Tour Emergency Support
- Note: Tour cost does not include airline-imposed baggage fees, any required passport or visa fees, or optional excursions. Optional excursions, or other individual/group customizations will be listed as separate line items in the total trip cost, if included.
- Note: On arrival day only dinner is provided; on departure day, only breakfast is provided

## Tour investment

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Students (travelers under the age of 23): \$4,238

Adults (age 23 and over): \$4,768

Price reflects savings of \$300 scholarship. Sign up by 5/31/2022 and enter code Travel5G in order to take advantage of this limited-time offer!

### Automatic monthly payment plan

Pay just \$99 upon enrollment and the balance will be divided into equal monthly payments, charged automatically to your credit card or checking account. As of May 03, 2022, your monthly payment would be just \$172.46.

## Travel protection

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We recommend covering your educational investment with one of our two comprehensive travel protection plans offered through Trip Mate. For details, visit [worldstrides.com/travel-protection-plans](http://worldstrides.com/travel-protection-plans).

Enroll online,  
by phone, or by mail



Visit [educationaltravel.com/Canenguez-9710](http://educationaltravel.com/Canenguez-9710)



SCAN ME

Use Canenguez-9710 to register



1.800.771.5353



Mail in your paper application to:

WorldStrides Programs  
Attn: Participant Services  
PO Box 9033  
Charlottesville, VA 22906-9033

## GENERAL TERMS BEFORE WE GET STARTED

### Important Information

By registering for this program, you are agreeing to participate in a full-service group educational travel experience, operated by Lakeland Tours LLC dba WorldStrides, or one of our affiliate businesses. Because of the unique nature of group travel, many elements of your program and itinerary may be selected and/or scheduled at the direction of your group's Program Leader (the teacher, administrator, or parent from your school or community), who will act as your group's representative. Further, please note that, while WorldStrides and its affiliates will arrange the various travel elements for your trip, the total price quoted for your program includes additional pre-trip services, including but not limited to the development of the associated educational content and materials, the printing and distribution of program materials, the costs associated with our various group health and safety measures, and the administrative and service costs related to group management.

### Waiver & Release

All participants must agree to a signed Participant Release and Binding Arbitration Agreement at the time of registration. This form can be viewed and agreed to during online registration, or printed, signed, and returned to WorldStrides via email to: customerservice@worldstrides.org or by mail to: PO Box 9033, Charlottesville, VA 22906.

## FLEXIBLE PAYMENT OPTIONS

We provide you with options and flexibility to make our educational experiences more accessible.

### What are your payment options?

**1) Monthly Automated Payments:** Pay your deposit and optional travel protection plan costs with credit/debit card or checking account upon enrollment, and the balance of your Tour Fee will be automatically charged to your card or debited from your account in equal monthly installments until 35 days prior to your departure date (checking account) or 65 days prior to your departure date (credit/debit card). Please note that you must make all payments by credit card, debit card, or checking account. If two consecutive payments are returned NSF or declined by your bank or credit card company, we will change your account to the designated Manual Plan.

**2) Pay in Full:** Pay in full at the time of enrollment.

**3) 4-Step Manual Payments:** Pay your deposit and travel protection plan costs upon enrollment, \$500 toward your Tour Fee 30 days later, and 75% of your remaining balance at 110 days prior to departure. The final remaining balance is due 65 days prior to departure and can be paid by check, credit or debit card, or checking account. If you enroll 150 days prior to departure or later, you will make only three payments—deposit and travel protection plan costs at enrollment, 75% of your remaining balance at 110 days prior to departure, and the final balance at 65 days prior to departure. Please note that we do not automatically deduct payments on this plan; you must make each payment manually.

All full-paying participants, including participants who have previously traveled, are required to pay a deposit upon enrollment. Any participant who has already paid the deposit for a previous tour will receive a \$100 credit on your account.

Your account must be paid in full by the final payment deadline or your account will be subject to cancellation.

### What if you're late on a payment?

**Late Registration, Late Payment, and Fees:** WorldStrides charges a late registration charge of \$145 if enrollment is less than 110 days before departure. If you are late on any payment, you will be subject to a \$50 late payment fee. No personal checks or business checks will be accepted after the final payment deadline. Only certified check, money order or credit card payments will be accepted. There is a \$35 service charge on returned checks, declined credit cards or declined e-checks. A \$200 fee may apply for any name changes made within 85 days of departure. A \$50 fee, plus any additional airfare costs, will be assessed if you cancel your reservation and choose to re-instate at a later date.

**Waitlist:** Your program space is not guaranteed until your account has been paid in full and you have been advised in writing that all conditions for travel have been satisfied. If you are placed on a waitlist due to late registration or an outstanding account balance after final payment date your account must clear waiting list procedures and may involve additional airline and other charges.

## What do you need to know about your program fees?

The price quoted is based upon a minimum number of travelers. The price quoted is also subject to adjustment if the minimum enrollment is not met, if the program content or itinerary changes, or in the event of circumstances beyond WorldStrides' direct control. Your group may be combined with other group(s) on the program to reach minimum. The combinations may not be of the same age level or have the same itinerary. If the Program Leader chooses not to be combined and travels with less than the minimum number of participants, an additional cost will be charged to your account.

**Non-Refundable Fees:** The fee for enrollment in a Trip Protection Program (discussed below), your deposit, any handling charges, merchandise fees, fees for returned checks, fees for declined credit cards or electronic drafts, late payments, and registration fees are not refundable under any circumstances.

## What is not included in your program fees?

Unless specifically stated in your program, WorldStrides' program prices do not include college credit fees, passport fees, visa fees, trip protection fees, baggage charges, portage at airports and hotels, gratuities to guides or bus drivers, private or small group fee, expenses incurred during free time, optional excursions, trip extensions, local transportation to unscheduled activities, transportation from your home to the origination point of the program, overnight lodging and meals prior to departure or upon return from a program or the weekend supplement if your departure or return flight falls on a Friday, Saturday or Sunday (not applicable to tours to the United States, Canada or Puerto Rico).

**Adult Supplements:** Adults are automatically placed in twin rooms unless a single room upgrade is requested and available for the required additional applicable fee(s). Depending on the selected tour type, adult groups may be combined with student groups. In addition to the twin or single room fee, adults pay a supplement fee of \$125.

# EXPLORE BEYOND THE CLASSROOM!

## Program Information

Prior to departure, you will receive details regarding flight and hotel information, departure and return times, packing tips, drop-off/pick-up locations, etc. Flight times, airlines, itineraries, tour leader(s), and hotel information are subject to change. This is especially true when participating in a tournament or event, where WorldStrides is subject to the program hosts' schedule, accommodations, and transportation.

## Protecting You on Tour

While on tour, all participants are provided with accident, illness, and accident-related dental insurance coverage to cover out-of-pocket costs beyond the participant's own insurance. This insurance covers up to \$7,500 for accident, \$1,500 for illness, and \$750 for accident-related dental. Pre-existing conditions are not covered. Any charges not covered are the responsibility of the participant. Other limitations may apply. Full details are available at [www.tripmate.com/wpF369W](http://www.tripmate.com/wpF369W).

Please note, participants are solely responsible for their pre-program, program, and post-program medical care in all respects, including, but not limited to, obtaining and taking necessary medication(s), vaccinations, and any other medical care and treatment.

## Age Restrictions for Young Travelers

We do not accept applications for travelers under the age of 6 at time of departure. Registration for children 12 and under is subject to individual review, and the decision to allow participation in a trip is at the sole discretion of WorldStrides.

## Travel Documentation

Every participant is responsible for obtaining the required documentation necessary prior to departure, such as a valid passport, visa, transit visas, notarized parental consent form (if applicable), and any required travel insurance coverage. Secure flight data (including name and birthdate) must fully match the information provided to WorldStrides for inclusion on travel documentation and airline tickets, and must meet any other applicable compliance requirements issued by the Transportation Security Administration or related agencies. WorldStrides provides online and customer service to keep the program participant's information current and it is the participant's sole responsibility to assure that this information is fully up to date no later than 85 days prior to the group's departure date. If changes occur after that date, the participant must contact customer service and additional change fee will apply. Visit the Transportation Security Administration website at [www.tsa.gov](http://www.tsa.gov) for more information.

If a participant is unable to travel due to the lack of a proper identification, passport or visa, or necessary inoculations, the standard cancellation policy will apply. Reservations are not transferable at any time.

## Course Credit

Because WorldStrides holds various accreditations, participants may qualify for course credit for participation in a WorldStrides program. Schools, colleges, and universities hold varying policies regarding a student's eligibility to earn or redeem course credit from other accredited institutions. Students should consult their school guidance counselors and/or school policy handbooks to determine their eligibility. WorldStrides is not responsible for the approval or issuance of course credit.

## Optional Accommodations for Individuals and Groups

Participants may upgrade to a twin or single room for an additional fee upon availability. All participants aged 22 and younger at time of departure room in same-gender rooms in triple or quad rooming with travelers from the entire group. Minors, under the age of 18, are not able to room by themselves. Alternatively, your Program Leader may select a custom or "Exclusive Rooming" option, which ensures that students from your group will not be mixed with students from other groups during hotel stays.

**Tour extensions:** For the majority of WorldStrides' programs tour extensions must be booked at the time of enrollment, must apply to the entire group, and any changes will incur additional charges. All tour extensions are based on the agreed upon paying participants. If there are fewer than participants enrolled on a tour extension, WorldStrides reserves the right to add a surcharge or cancel the tour extension at its discretion.

**Stay-ahead and stay-behind:** If the entire group would like to arrive at the first destination a few days earlier or stay at the final destination a few days later than the scheduled tour, WorldStrides can change your airline tickets. The service fee is \$50 per participant, plus additional costs for land arrangements, which will be passed along to the participants. This optional tour enhancement requires a minimum of 10 paying participants. If an individual participant would like to opt to stay ahead or behind your scheduled tour, WorldStrides can arrange the airline ticket for a service fee of \$145 if requested upon enrollment. If requested after enrollment and up to 110 days prior to departure, the fee is \$195. We will change your airline ticket and you are responsible for all accommodations, meals, and transfers before and after the scheduled tour. Because we will arrange your airline tickets separately from your group's, we cannot guarantee that you will share any of the same flights, and additional fees may apply.

**Land-only:** Some Program Leaders may opt for the group to arrange for your own airline tickets and begin your tour at the first hotel at destination. You are solely responsible for transport to/from airports, including the ground transport to meet/depart from the group. For some of our tours, individual participants may opt to arrange your own airline tickets and join the group at the hotel at the first overseas destination your tour fee will reflect the discounted land only rate. You may select this option upon enrollment or up to 110 days before departure and thereafter additional fees may apply. This option is not available less than 90 days before departure. Land only participants are responsible for their own airline tickets and airport transfers. If a participant books airfare prior to the trip being confirmed by an Account Manager, WorldStrides is not responsible for any flight reimbursements/refunds.

**Optional excursions:** On the majority of our international programs we offer a number of optional activities pre-negotiated with our overseas suppliers. For most optional activities you can enroll online up to 110 days prior to your departure date, and you can enroll over the phone for most excursions up to 45 days prior to departure. After that date, you can register on a space-available basis only during the tour itself. All optional excursions are based on the agreed upon paying participants. If there are fewer paying participants enrolled on an optional excursion, WorldStrides reserves the right to add a surcharge or cancel the optional excursion at its discretion.

**Alternate departure airport:** Depart from an airport different from your fellow group members. You pay the Tour Fee from the alternate airport, plus a service fee of \$145 if requested up to 130 days before departure. If requested between 129-90 days before departure, the fee is \$195. This option is not available less than 90 days before departure. Additional fees may apply, and your alternate airport must be one of Worldstrides' gateways.

If you are traveling outside of WorldStrides scheduled tour dates, the participant is responsible for all associated costs. WorldStrides is not responsible for participants when they are not part of WorldStrides organized activities, during deviations and/or stay-ahead/stay-behind optional periods, and any time that the activities do not include the services of a WorldStrides Tour Director.

**Frequent Flyer Miles:** Frequent flyer miles are not available to participants.

## Personal Property

Participants are fully responsible for any costs arising from the damage, loss, or theft of any personal property during the program.

## Travelers with Disabilities

WorldStrides happily welcomes all travelers on our tours. However, the trips are fast paced, require a great deal of walking, and can be physically demanding. Due to these restrictions, you may not be able to fully participate in the tour. Furthermore, WorldStrides is not responsible for any denial of service by carriers, hotels, restaurants, and other independent suppliers, and cannot refund the cost of any activity in which you were unable to participate. We encourage that any disability requiring special attention be reported to the Program Leader and WorldStrides at the time you make your reservation. WorldStrides will make reasonable attempts to accommodate special needs. Travelers requiring extraordinary assistance must be accompanied by a paying companion who is capable of and totally responsible for providing the necessary assistance.

## Special Dietary Requirements

WorldStrides cannot be responsible for accommodating any food allergies, or dietary requirements and restrictions, and is not responsible for any problems associate with food or drink, including allergies. Dietary requirements and restrictions are the sole responsibility of the participant.

## Supervision/Behavior

WorldStrides, the Program Leader, and chaperones establish behavior rules and directions for all student participants. Failure to abide by the rules or directions may result in the student being sent home at the parents' expense without any right to a refund. All program participants will be responsible for their own actions at all times, and the Program Leader and chaperones will be held accountable for the action of all participants in their group.

Consumption or possession of alcoholic beverages or drugs of any kind for which you do not have a valid prescription, behavior infringing upon the ability of others to enjoy the Program, or compromising your own or others' safety, or is otherwise inappropriate, or violates the law as well as violation of certain other rules, constitute grounds for immediate expulsion from the tour.

WorldStrides is committed to providing an environment that is free from harassment. Harassment based upon an individual's sex, race, ethnicity, national origin, age, religion or any other legally protected characteristics will not be tolerated.

On occasion, program participants may be allowed by the Program Leader to leave the group and to explore on their own. WorldStrides has no responsibility for participants when they are on their own and it is the sole responsibility of those participants to take whatever actions are necessary to rejoin the group, at their own cost. If a program participant is late in appearing for a scheduled departure, the Program Leader has no duty to delay the Program to wait for the participant.

## What happens if your program changes after registration?

**Program Changes Made by WorldStrides:** Changes or substitutions in hotels, itinerary, inclusions, or airports may be made depending on your travel dates, arrival and departure times, national holidays, and events beyond WorldStrides' control at the discretion of WorldStrides as it deems necessary or desirable. Changes in itinerary, including reversing the itinerary, changes to the order in which cities or countries are visited, the duration of the stay in each city, addition and omission of cities or countries may occur. On certain dates some attractions or activities may be closed, and the availability of some venues advertised or communicated cannot be guaranteed. Some venues may require special equipment. Venues may also close without prior notice due to public holidays, festivals and routine maintenance. In these instances, no refunds can be given. Whenever possible, suitable alternatives will be provided.

WorldStrides reserves the right to change the date of departure by no more than two days from the original departure date in spring (Oct-Apr) and three days in the summer (May-Sept). These changes are not grounds for cancellation without penalty or for refunds after the tour.

On occasion, WorldStrides must change dates of a scheduled program by more than 3 days as the result of Exceptional Circumstances, as defined below, or as a result of operational challenges or difficulties, including without limitation, travel restrictions, event cancellations, facility closures, government-imposed restrictions/closures, or other reasons beyond the control of WorldStrides.

Should WorldStrides need to change the destinations visited and/or the dates of a scheduled program by more than 3 days, we will work with your group's Program Leader to reschedule your trip to dates that work for your group. If you elect to cancel because your program dates are changed by more than 3 days, the policy regarding Cancellation due to Exceptional Circumstances may apply.

**Changes Made by Your Group:** WorldStrides offers its WorldClass Flex Program to enable groups to plan trips with confidence. We understand your group may need to change your trip due to unforeseen circumstances. If your group decides they are not comfortable traveling to the planned destination or on the scheduled dates, the group can move the trip to an alternative destination or move to a new future date up until 60 days before departure. Changing the destination or date of the trip will be determined based on availability of trip components including, but not limited to, accommodations, venues, attractions, content, meals, and transportation. We will work with your Program Leader to find an alternative future date up to 24 months from your original departure date. Your group will be able to adjust your trip with no additional fees, just the difference (if applicable) in the price of the new trip.

In the event a tour is moved to the future, all monies paid (less any Non-Refundable Fees) can be transferred from an existing participant to a new participant if the new participant enrolls (which enrollment will include express agreement to these Terms and Conditions) by 110 days before departure. Once funds are transferred, the new participant is subject to the full Terms and Conditions and standard refund policies as defined for the group on the original scheduled trip.

If you or your group reschedules to a new destination or date and then decides to cancel, the cancellation fees will be calculated from the date of transfer from the original tour and standard cancellation fees will apply.

For departures from cities with multiple airports within a reasonable distance, WorldStrides will book flights interchangeably between the airports.

## What if you have to cancel your registration?

All cancellations must be made in writing by the person listed on the registration form to your account representative or customer service at [customerservice@worldstrides.org](mailto:customerservice@worldstrides.org) or via mail to WorldStrides, P.O. Box 9033, Charlottesville, VA 22906-9033, must be postmarked prior to the group's departure, and must include account number, registrant's name, and complete address.

The Program Leader may cancel the program on behalf of the entire group, or any individual participant. Within 24 hours following receipt of your registration confirmation or initial payment invoice (whichever is first), you may cancel your WorldStrides program and receive a full refund. After 24 hours, the Standard Cancellation Policy applies unless the Full Refund Program is purchased.

All refunds are issued using the original form of payment on the account. Check refunds are only issued to the primary responsible party listed on the account. WorldStrides accepts payment via check, e-check, debit card, and credit card. Should you choose to use a gift and/or preloaded credit card to make one or more payments on your WorldStrides account, WorldStrides is not responsible for replacing any credits that are successfully processed back to any lost, stolen, or destroyed gift or preloaded credit card account used for payment.

**Standard Cancellation Policy:** The services and value we provide begin long before your date of departure, and there are significant unrecoverable costs as your departure date approaches. Therefore, if you do not enroll in the Cancel for Any Reason Plan and you, the Program Leader, school, or school administration cancel beyond the 24-hour grace period, WorldStrides will be entitled to retain (in addition to the Non-Refundable Fees):

- \$399 non-refundable fee if more than 150 days
- \$599 non-refundable fee if between 150-110 days
- 50% of all fees + \$99 non-refundable fee if between 109-76 days
- 75% of all fees + \$99 non-refundable fee if between 75-31 days
- 100% if 30 days or less

**Cancellation due to Exceptional Circumstances:** If your group is unable to reschedule your trip to a new destination or date, and your program is canceled or cannot be delivered due to Exceptional Circumstances (explained below), travelers who did not purchase the Cancel for Any Reason Plan, will be refunded all monies paid less Non-Refundable Fees and an additional cancellation fee of \$399 for trips involving international air travel, \$289 for trips involving domestic air travel, or \$149 for trips involving domestic bus travel. After August 2021, cancellation fees for non-purchasers of Cancel for Any Reason Plan will be \$499 for international air travel, \$389 for domestic air travel, and \$189 for domestic bus travel. Please note – these fees are not intended to be a penalty, but rather a fair estimation of a portion of the unrecoverable internal and external costs related to planning, managing, and administering a full-service group travel program, that are incurred by WorldStrides prior to the date of departure.

**Exceptional Circumstances:** Without limitation, WorldStrides, including its affiliates, owners, officers, agents, employees or any associated organization, is not responsible for any injury, loss, or damage to person or property, death, delay, overbooking or downgrading of accommodations, mechanical or other failure of airplanes or other means of transportation or for any failure of any transportation mechanism to arrive or depart timely, dangers associated with animals, sanitation problems, food poisoning, lack of or quality of medical care, illness or disease, difficulty in evacuation in case of a medical or other emergency, or for any other inconvenience beyond the direct control of WorldStrides, in connection with the provision of any goods or services whether occasioned by or resulting from, but not limited to, Exceptional Circumstances. Exceptional Circumstances may also justify postponement or (if postponement is not achievable) cancellation of trips. Exceptional Circumstances include, but are not limited to, acts of force majeure, war (whether declared or not), criminal or terrorist activities of any kind or the threat thereof, civil unrest, strikes or other restrictive labor activities, illness or disease, actual, perceived or threatened epidemics or pandemics, government-imposed travel restrictions or closures, and other events outside WorldStrides' control that make performance of a trip as contemplated impossible or impractical.

## PROTECTING YOUR INVESTMENT

**Through Trip Mate, our third-party travel protection plan provider, WorldStrides offers two great plans that help protect your educational travel investment.**

**Travel Protection Plan:** Trip Mate's standard travel protection plan covers you for the following events:

- A traveler's injury, sickness, or death of a family member
- Theft of passport or visas
- Flight cancellations due to strike or bad weather
- Loss of luggage and personal effects
- Trip cancellation or trip interruption due to covered reasons such as a covered sickness, illness, injury or death
- Trip cancellation or trip interruption due to terrorist acts, as defined

**Ultimate Protection Plan:** Along with providing you all the same benefits as our Standard Travel Protection Plan, the Ultimate Protection Plan also includes a Cancel For Any Reason Waiver Benefit.

With our Cancel For Any Reason Waiver Benefit, if you cancel your trip for any reason not otherwise covered by this policy, we will reimburse you for 75% of the non-refundable cancellation fees which apply to your trip, provided:

- 1) Payment for this plan is received by WorldStrides within 14 days of your initial deposit/payment for your trip; and
- 2) You cancel your trip 48 hours (2 days) or more before your scheduled trip departure date.

This Cancel For Any Reason Waiver Benefit does not cover: 1) penalties associated with any air or other travel arrangement not provided by WorldStrides; or the failure of WorldStrides to provide the bargained-for travel arrangements due to cessation of operations. The Cancel For Any Reason Waiver Benefit is provided by WorldStrides itself and is not an insurance product. It must be purchased within 14 days of your initial payment for your trip.

For more information, visit [worldstrides.com/travel-protection-plans](http://worldstrides.com/travel-protection-plans).

For the Description of Coverage online, view the policy details at <https://www.tripmate.com/wpUF380H>.

The cost for the Travel Protection Plan is \$149. This plan should be purchased at the time of enrollment, and cannot be refunded once selected. The cost for the Ultimate Protection Plan is \$249. This plan should be purchased at the time of enrollment, and cannot be refunded once selected.

**USTOA Membership Means You're Protected:** WorldStrides, as an Active Member of USTOA, is required to post \$1 million with USTOA to be used to reimburse, in accordance with the terms and conditions of the USTOA Travelers Assistance Program, the advance payments of WorldStrides' customers in the unlikely event of WorldStrides' bankruptcy, insolvency, or cessation of business. Further, you should understand that the \$1 million posted by WorldStrides may be sufficient to provide only a partial recovery of the advance payments received by WorldStrides. Complete details of the USTOA Travelers Assistance Program may be obtained by writing to USTOA at 275 Madison Avenue, Suite 2014, New York, New York 10016, or by e-mail to [information@ustoa.com](mailto:information@ustoa.com) or by visiting their website at [www.ustoa.com](http://www.ustoa.com).

Lakeland Tours, LLC d/b/a WorldStrides, its employees, shareholders, subsidiaries, affiliates, officers, directors, successors, agents, and assigns (collectively, "WorldStrides") does not own, operate or control any person or entity which is contracted to or does provide goods or services for your trip, including, for example, lodging facilities, airline, vessel or other transportation companies, guides or guide services, local ground operators, entertainment or sightseeing operators, providers or organizers of optional excursions, food service providers, etc. All such persons and entities are independent contractors. As a result, WorldStrides is not liable for any negligent or willful act or failure to act of any such person or entity, or of any third party. Further, WorldStrides is not liable for any inconvenience, costs, losses, or damages associated with the denial of services or special requirements of services imposed by such person or entity, or of any third party.

Participants traveling on tours that include a Greek cruise should refer to the Carrier's Conditions of Carriage (which govern the legal relationship between the passenger and the carrier), at this page: [www.celestialcruises.com/en/conditions-of-carriage](http://www.celestialcruises.com/en/conditions-of-carriage)

Any dispute concerning these Terms & Conditions and/or any other matter concerning the trip, including, but not limited to, any events and circumstances occurring during the trip, shall be resolved exclusively by binding arbitration in Charlottesville, Virginia, according to the then existing commercial rules of the American Arbitration Association. Such proceedings will be governed by substantive (but not procedural) Virginia law. The arbitrator and not any federal, state, or local court or agency shall have exclusive authority to resolve any dispute relating to the interpretation, applicability, enforceability, conscionability, or formation of this Agreement, including but not limited to any claim that all or any part of this Agreement is void or voidable. By accepting these Terms and Conditions, you are irrevocably, unconditionally, and expressly submitting to binding arbitration, in lieu of having any such dispute decided in a court of law before a jury.

Because the nature of our business requires coordination with various providers who deliver the travel services, it is necessary to share some personal information from time to time. For more information, please visit: [worldstrides.com/privacy-policy](http://worldstrides.com/privacy-policy).

- Hawaii TARS-5388; IA 568; and WA 601 887 646, 602 011 744.
- California Seller of Travel Registration No; 2041618-20. Note: Registration as a seller of travel does not constitute approval by the state of California. WorldStrides' principal office is located in Charlottesville, VA. This transaction is not covered by the California Travel Consumer Restitution Fund. You are not eligible to file a claim against that Fund in the event of WorldStrides' default. These Term and Conditions apply to the maximum extent permissible without violating individual applicable state laws; to the extent state law invalidates any provision, all provisions not invalidated by state law will remain in force.

Please note: A participant will not be allowed to travel on a WorldStrides tour if his/her name does not appear on the travel roster on the day of departure, or if he/she has not submitted a signed waiver and release form, emergency medical release form, or personal behavior contract. By registering for a WorldStrides trip, and making an initial deposit, participants and/or persons listed on the account are agreeing to and consenting to these Terms and Conditions. If you do not understand any of the foregoing Terms and Conditions, or if you have any questions or comments, please contact WorldStrides Customer Support at 1-800-468-5899.

# A Partner You Can Rely On

In 2021 alone, we supported tens of thousands of travelers around the world. For more than 50 years, WorldStrides has been the trusted educational travel partner of more than 9 million travelers, and our industry-leading commitment to health and safety speaks for itself. Expecting the unexpected is where we excel.

## Tackling the new normal

Traveling today looks different than it did a few years ago, and that's why working with a trusted organization is more important than ever. Our team is relentlessly committed to providing fun, educational experiences that never sacrifice peace of mind. All aspects of every program are reviewed, from the initial planning stages to the on-tour experience, and the health and safety of our participants is our top priority every step of the way.

## Evolving Standards

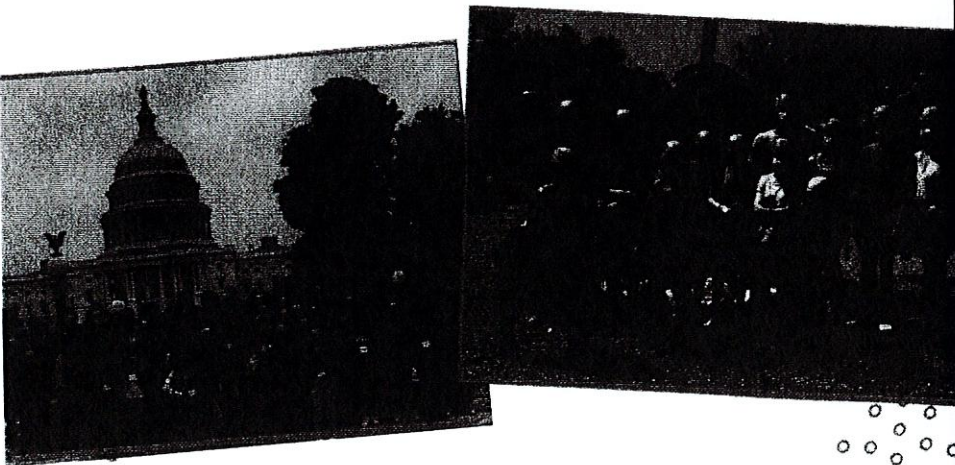
Our team is continually evaluating and updating our protocols based on current CDC guidance and the recommendations of our Doctors on Call Team from The George Washington University Department of Emergency Medicine. Led by Dr. Neal Sikka, who also serves as WorldStrides' Medical Director, our Doctors on Call Team is an interdisciplinary group with access to experts from public health, infectious disease, and laboratory services (testing).

**WorldStrides**  
Educational Travel & Experiences

**92,427**

**0.19%**

**0.16%**



*"I was comforted to know that WorldStrides kept on top of all COVID protocols... When our school leader sent group photos, I could tell they were on a trip of a lifetime."*

-Claudia, Parent, June 2021

*"The trip was highly anticipated... They [the students] had missed out on so much already! This trip was everything! One that will never be forgotten."*

-Kelly, Parent, June 2021

Check out additional traveler photos and testimonials here [worldstrides.com/travel-gallery](https://www.worldstrides.com/travel-gallery)

## With you every step of the way.

All participants are required to provide proof of a negative COVID-19 test in order to travel. If their test is positive, we work with them on options for future travel. A Safety Briefing is conducted for all participants to share travel tips and best practices for staying healthy, and our Top Travel Safety Tips help students learn about safety in a series of short, fun videos.

We've refined every piece of the itinerary from hotel selection and meals to motorcoach protocols and flexible rooming options. If a student experiences symptoms, we safely separate them from the rest of the group and arrange testing. If the test result is positive, we're there every step of the way.

Our team goes above and beyond by offering support for any group with participants who become ill during the 14 days after returning home. In the event a participant tests positive, our team supports teachers in contact tracing and notifications as needed.

### Change Dates Flexibility

Change your tour dates or destination, no questions asked. Up to 60 days prior to departure.

- No change fees, just the difference (if applicable) in the price of the new trip.
- Travelers may transfer their spot to new participants up until 110 days before the new departure date.
- Additional Terms & Conditions apply.

### Special COVID-19 Flexibility for Groups and Individuals

If closures, government regulations, or travel restrictions due to COVID-19 prevent WorldStrides from delivering your tour, the group's Program Leader can postpone or move the tour with no fees associated. Anyone who has to cancel may transfer their spot to a new participant up until 110 days before the new departure date or will pay only a modest cancellation fee of \$399 for international tours, \$289 for domestic air tours, or \$149 for domestic bus tours.

Learn more at

*"This was one of the greatest times of my life. I learned a lot and had a lot of fun with my friends. I would highly recommend taking the opportunity to participate in this trip experience if you have the chance."*

*— Nicholas, Student, Traveled May 2021*



## Earn Academic Credit – International

Students! You can register for **Discovery for Credit** coursework before, during, or after the travel portion of the program. Courses consist of the travel portion of the program combined with an online course. Most assignments are designed to be completed after travel, since they ask that you incorporate much of what you learned during the field experience. We encourage you to log on before travel, if time permits, to get a feel for the course and explore its components. There is a 6-month deadline from the return date of travel to complete all online assignments.

Upon successful completion and the processing of credits, a transcript may be ordered directly from WorldStrides or George Mason University. Transcripts can be submitted to school registrars for consideration or attached separately to college applications or résumés. Students and educators should check with receiving institutions with regard to credit transfer policies.

WorldStrides holds accreditation through multiple regional agencies, including both corporate-level and school-level accreditation through Cognia (formerly AdvancED). This enables our traveling students to earn academic credit in conjunction with travel programs.

### Types of Academic Credit

#### High School Credit

Students who are in grades 6-12 at the time of travel on WorldStrides programs are eligible to enroll in courses to earn high school credit at no additional cost. Courses vary in theme, content, and length based on the travel destination. For in-depth descriptions of courses applicable to your program and to register, go to your MyTrip page and click on the Academic Credit banner.

#### College Credit

Students who are in grades 9-12 at the time of travel on WorldStrides programs are eligible to enroll in courses to earn college credit in conjunction with our university partnership with George Mason University at no additional cost. Courses vary in theme, content, and length based on the travel destination. For in-depth descriptions of courses applicable to your program and to register, go to your MyTrip page and click on the Academic Credit banner.



[worldstrides.com](http://worldstrides.com)



## Available Courses

Our experience working with successful students in our courses informs our recommendation for choosing the course level that's best for you. These guidelines are quite flexible!


- Global Perspectives 0.5 credit high school
- Global Perspectives 1 CR college
- Global Perspectives 3 CR college

- Students in 6<sup>th</sup>-9<sup>th</sup> grade are likely going to enjoy and be successful in the high school course.
- Students in 9<sup>th</sup>-11<sup>th</sup> grade are likely going to need to weigh their comfort working in a self-paced environment and choose between high school credit or the 1-credit college course.
- Students in 10<sup>th</sup>-12<sup>th</sup> grade are likely going to need to weigh the amount of time they can dedicate to their online studies and their experience with advanced coursework as they choose between the 1-credit and the 3-credit college courses.

## How to Register


1. Visit your MyTrip page
2. Click the Academic Credit banner
3. Select your course
4. If you have questions, please email us at [discovery@worldstrides.com](mailto:discovery@worldstrides.com).

## Academic Credit

Access your online coursework 



Janet Johnstone  
*Coordinator of Instructional Services*  
Phone: 269.323.5140  
fax: 269.323.5141  
[jjohnstone@portageps.org](mailto:jjohnstone@portageps.org)

**TO:** Mark Bielang  
**DATE:** May 3, 2022  
**FROM:** Janet Johnstone/Dr. Michael Pascoe   
**SUBJECT:** Central High School 2023 field trip to France

**RECOMMENDATION:**

I recommend the approval for the Portage Central High School French Club to travel to France as described in the attached material. The trip dates are set for June 13-22, 2023. **The current travel advisory is to exercise increased caution. It is recommended that attention be paid to the safety of this region prior to travel.**

**BACKGROUND:**

Rachel Flachs is proposing a student trip to France for June 13-22, 2023. They will spend 10 days out-of-state. The purpose is for students to improve their French language skills in an authentic context, while also enriching their knowledge of the French culture and making connections to their own culture(s). The students will not miss any instructional time. Chaperones will be a ratio of approximately 1 adult to every 6 students (number attending: Approx. TBD Portage students, TBD adults).

I have reviewed this proposal and support it.

JJ/MP  
Attachments

The primary purpose of school-approved student trips is to provide substantive curricular, co-curricular, and extracurricular enhancement not available in the local setting. It is not the intent of Policy #2340/AG #2340A to establish annual travel opportunities. Recognizing this purpose, consideration of trip approval begins with an evaluation of the special nature of the enrichment activities and the relationship of the trip's education goals to the curricular, co-curricular, or extracurricular activity.

If this trip requires **Portage PS transportation**, the form should be received by the transportation office **at least two (2) weeks** prior to the date of the trip. To allow for approval at all levels, it is recommended that this form be submitted **at least 3 weeks in advance**.

An itinerary must be submitted with any out-of-state overnight trip.

**International Trips:** If any duration of this trip is spent out of the country, the request needs to be submitted with **at least four (4) months' notice** to provide sufficient time to obtain all levels of approval. Please note that you may be asked to present your educational trip request to the Portage Board of Education for approval and no fundraising may begin until BOE approval is received.

### SECTION 1

School	CHS	Group	French Club	Date of Request	5/2/2022 21:13:15
Start Date	Tues. 6/13/2023	End Date	Thur. 6/22/2023	Amount of Instructional Time Lost	none
Departure Time from School	6:00:00 PM	Return Time to School	6:00:00 PM	PPS Transportation?	No
Bus Loading/Van Pickup Time		Departure Time from Destination		ASN:	
Additional Details for Driver/Transprt. Dept.					

### SECTION 2

**Trip Destination:** France

**Educational Goal(s)/Purpose of Trip:**

To improve students' French language skills in an authentic context, while also enriching their knowledge of the French culture and making connections to their own culture(s)

Standards and benchmarks can be shared via Google Doc. Please let me know with whom I should share them.

Proposal - France 2023

### SECTION 3

# of Students	TBD	# of Staff Chaperones	TBD, but at least 1 per 6 students	# of Additional Adult Chaperones	TBD
# of Buses		# of Lift Buses		# of Vans	
Estimated Cost per Student	\$4,800	Funds Provided by	Private/Family		
Estimated Cost of Trip	\$4,800	Amount per Funding Source			

*Electronically complete sections below*

### SUPERVISOR/PERSON OVERSEEING TRIP

Name	Rachel Flachs	Contact Phone #	616-405-3877
Electronic Signature: <i>(employee overseeing trip needs to electronically sign below)</i>		Date:	
x Rachel Flachs			

**Reminders: Forward to/Share with your principal for approval & attach any additional documentation if applicable (i.e., Itineraries, Benchmarks/Standards, Travel company contracts, etc.). Notify food services if trip conflicts with lunch.**

Office Use ONLY:				
Principal Decision:	<input checked="" type="checkbox"/>	Approve	Principal Signature: <i>(electronically sign name below, or add e-signature)</i>	Date: <i>(enter below)</i>
	<input type="checkbox"/>	Deny	<b>x Eric Alburtus</b>	<b>3 May 2022</b>
Superintendent (or designee) Decision:	<input type="checkbox"/>	Approve	Supt. (or Designee) Signature: <i>(electronically sign name below, or add e-signature)</i>	Date: <i>(enter below)</i>
	<input type="checkbox"/>	Deny	<b>X</b>	

<b>Date Received by Transportation:</b>		<b>Received by:</b>	
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**Assignment: Provided 1-5 days prior to trip**

Bus #:	<input type="checkbox"/>	Driver: _____	Bus #:	<input type="checkbox"/>	Driver: _____
Bus #:	<input type="checkbox"/>	Driver: _____	Bus #:	<input type="checkbox"/>	Driver: _____
Bus #:	<input type="checkbox"/>	Driver: _____	Bus #:	<input type="checkbox"/>	Driver: _____
Bus #:	<input type="checkbox"/>	Driver: _____	Bus #:	<input type="checkbox"/>	Driver: _____

Routing: Teacher signs, forwards email to Principal. Principal signs, forwards to [jjohnstone@portageps.org](mailto:jjohnstone@portageps.org). Inst Serv forwards to Transportation as needed

## **Documents included:**

- Page 1: Cover page
- Page 2: Specific Educational Goals
- Page 3-4: Tentative Itinerary
- Pages 5-7: Why travel abroad enhances learning

# **Specific Educational Goals of the Trip to France:**

C1.1N.SL.i Ask for and obtain information in everyday situations in the target language about time, place, price, size, relating to restaurants, stores, transportation, and services

C1.2.A.L.b Understand interpersonal communication, spoken messages, interviews, group discussions and lectures in the target language on a variety of familiar and unfamiliar topics

C4.1.A.c Recognize that register/honorifics reflect culture, and use this knowledge to adjust language accordingly and strengthen the understanding of both languages

C4.1.A.d Recognize that phonological features (such as pronunciation, intonation, and tone) reflect culture, and use this knowledge to adjust language accordingly and strengthen the understanding of both languages

C4.2.A.a Describe the institutions, values, beliefs, and perspectives that serve as the foundation of the target culture practices and compare them to one's own

C5.2.A.a Seek opportunities and use the target language in real life situations within the community

**Tentative itinerary:**  
**Traveling with WorldStrides International**  
**Discovery Programs**

**Day 1 : Start tour**

**Day 2 : Bonjour Paris**

**Day 3 : Paris landmarks**

- Paris guided sightseeing tour: Arc de Triomphe, Champs-Élysées, Eiffel Tower, Les Invalides, Notre Dame Cathedral visit
- Louvre visit: The world's largest art museum, the Louvre is housed in a Medieval fortress-turned-castle so grand it's worth a tour itself.

**Day 4 : Paris**

- Versailles Guided Excursion: The ultimate palace, Versailles was built by Louis XIII, and housed the royal family and its groveling court from 1682, when the Sun King moved in, to the French Revolution.
- LEAP Seize the Château!: A lively role-play puts you in the shoes of the monarchy, clergy, nobility, bourgeoisie, or peasantry to explore the issues underlying the French Revolution.
- Chartres Cathedral visit: Built on an ancient worshipping ground to house a piece of the Virgin Mary's veil (which is still on display), this 13th-century Gothic church is best known for its windows. With over 20,000 square feet of stained glass, visiting Chartres can be like walking around inside a large jewel.
- Eiffel Tower ascent

**Day 5 : Paris - Biarritz**

- Travel to Biarritz on the TGV : Take France's fastest train to coastal Biarritz, whose fame as a favorite bathing spot for international royalty earned it the nickname "The Queen of Beaches and the Beach for Kings." Once a whaling town, Biarritz now boasts some of the best surfing in Europe, fantastic views along the Basque coast, and a relaxed resort atmosphere.
- Biarritz tour director-led sightseeing: Although originally a whaling port, Biarritz was transformed into a retreat for the affluent after Empress Eugenie (wife of Napoleon III) began travelling there.

### **Day 6 : Biarritz**

- Guggenheim Museum visit:
- San Sebastián Tour Director-led sightseeing: Though one of Spain's most popular resorts, San Sebastián is not just beaches. With your Tour Director you'll visit the old quarter, centered around Plaza de la Constitución (known to locals as "La Consti"). Look for the numbers on the balconies around the square – the plaza was once used for bullfighting, and those balconies were rented as private boxes for spectators.

### **Day 7 : Biarritz - Provence**

- Travel to Provence via Carcassonne: Medieval Carcassonne looks like a fairytale city from the past -- its turreted citadel, crenelated city walls, and Gothic arched city gates bring you back to the 13th century.
- Carcassonne visit: Venture to the medieval walled town of Carcassonne, famous for its medieval citadel and imposing watchtowers.

### **Day 8 : Provence**

- Nîmes tour director-led sightseeing: Nîmes amphitheater visit, Maison Carrée visit
- LEAP En Garde!: Which is mightier—the pen or the sword? You decide! Learn basic calligraphy and fencing moves to gain new insight into old-world traditions.

### **Day 9 : Provence - Nice**

- Travel to Nice:
- Nice Tour Director-led sightseeing tour: The Côte d'Azur's largest city spills down the hillsides to pebble beaches that line the shore. Your Tour Director will show you around the narrow pedestrian streets and tiny squares of "Le Vieux Nice" (Old Town), which is sprinkled with old palaces and mansions. Stroll down the Promenade des Anglais, which runs parallel to the water.
- LEAP Painters' Provence: Make a sales pitch for a masterpiece by Cezanne, Monet, or another artist whose works highlight Provencal landscapes. Understand the impact that the light and landscape had on these artists.

### **Day 10 : Return Home**

- Depart France: Board a flight home.

# **Language, culture, and connections:**

## **How travel abroad enhances student learning**

The Eiffel Tower, the palace of Versailles, the D-Day beaches, sidewalk cafés, walking along the Champs-Élysées, buying a cup of Parisian coffee, enjoying a French baguette: these are all experiences that students will have if they seize the opportunity to travel to France with Portage Central High School in June 2023. While having these amazing experiences, students will also fulfill many state standards for World Languages and enrich their IB learner profile. They will be enhancing their linguistic and cultural knowledge, as well as making connections to their own culture(s).

Students will have countless opportunities to improve their French language skills in an authentic context. This trip is designed for those who have completed at least French III with a C or better. They will have the base knowledge to be able to communicate and to add to their linguistic skills. The following state of Michigan World Language standards will be met during this trip, relating to improving language skills:

- C1.1N.SL.i      Ask for and obtain information in everyday situations in the target language about time, place, price, size, relating to restaurants, stores, transportation, and services
- C1.2.A.L.b      Understand interpersonal communication, spoken messages, interviews, group discussions and lectures in the target language on a variety of familiar and unfamiliar topics
- C4.1.A.c          Recognize that register/honorifics reflect culture, and use this knowledge to adjust language accordingly and strengthen the understanding of both languages
- C4.1.A.d          Recognize that phonological features (such as pronunciation, intonation, and tone) reflect culture, and use this knowledge to adjust language accordingly and strengthen the understanding of both languages.
- C5.2.A.a          Seek opportunities and use the target language in real life situations within the community

By participating in this trip, students will also be enriching their knowledge of the target culture and making connections to their own culture(s). Reading about and studying culture in textbooks is good, but experiencing it meaningfully is something completely different. The first time you taste the freshness of French bread, the first time you chitchat with a shopkeeper, the first time you stand in a medieval castle: these are experiences that will change you and will change your perspective of your own

background and culture. I never realized how short the life of our country was (a couple centuries) until I stood inside Notre Dame, marveling at the fact that it took more than five centuries to complete it in its entirety. While on this trip to France, students will be meeting the following state of Michigan World Language standards relating to culture and connections:

- C4.1.A.c Recognize that register/honorifics reflect culture, and use this knowledge to adjust language accordingly and strengthen the understanding of both languages
- C4.1.A.d Recognize that phonological features (such as pronunciation, intonation, and tone) reflect culture, and use this knowledge to adjust language accordingly and strengthen the understanding of both languages
- C4.2.A.a Describe the institutions, values, beliefs, and perspectives that serve as the foundation of the target culture practices and compare them to one's own.

Travel abroad will not only strengthen the curriculum based on the state of Michigan's standards for World Languages, but will also enhance the learner profile based on the International Baccalaureate curriculum. Traveling to France will make IB learners:

- *Better inquirers:* Students' natural curiosity will be nurtured and encouraged while traveling abroad. Students will actively enjoy learning and will be engaged participants throughout the trip.
- *More knowledgeable:* They will gain in-depth knowledge of not only monuments and attractions, but also the history and culture that surround those monuments and attractions.
- *Better communicators:* Students will have the opportunities to practice their French and to understand the nuances of true communication, verbal and nonverbal.
- *More open-minded:* Students will see how differing values, perspectives, and traditions are expressed in another society, as well as how to better understand and appreciate their own culture(s) because of this. They will appreciate both cultural points of view.
- *More reflective:* Students will better understand their culture(s) and themselves. At the end of the trip, I ask students to do a reflection activity where they assess their own growth as a result of their new experiences abroad.

While experiencing the language and culture of France, students will engage in learning that is beyond knowledge and comprehension. They will visit a cooking school and cook a meal under the direction of professional teaching chefs. They will learn about the World War II soldiers' stories more in depth. They will apply, analyze, synthesize, and evaluate the world around them. They will consider different future paths of study,

and perhaps more globally-minded occupations. They will be more academically motivated. As a result, their classroom learning will be enhanced, and these students will be able to return and enrich the classroom experiences of their peers as well. By extending the classroom beyond the four walls, students will learn more and become better IB learners!

Janet Johnstone  
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Phone: 269.323.5140  
fax: 269.323.5141  
[jjohnstone@portageps.org](mailto:jjohnstone@portageps.org)

**TO:** Mark Bielang

**DATE:** May 12, 2022

**FROM:** Janet Johnstone/Dr. Michael Pascoe 

**SUBJECT:** Central High School 2023 field trip to Ecuador & Galapagos

**RECOMMENDATION:**

I recommend the approval for Portage Central High School Biology & Spanish students to travel to Ecuador & the Galapagos Islands as described in the attached material. The trip dates are set for June 26-July 6, 2023. **The current travel advisory is to Exercise Increased Caution Contains Areas with Higher Security Risk. It is recommended that attention be paid to the safety of this region prior to travel.**

**BACKGROUND:**

Cathy Laurencig is proposing a student trip to Ecuador & the Galapagos Islands for June 26-July 6, 2023. They will spend 10 days out-of-state. The purpose of this trip is to strengthen student understanding of curriculum standards for both world language and science as well as enhance the learner profile for the IB curriculum. It will also enrich their knowledge of the target culture and make connections to their own culture(s). The students will not miss any instructional time. Chaperones will be a ratio of approximately 1 adult to every 6 students (number attending: Approx./up to 36 students, 6 adults).

I have reviewed this proposal and support it.

JJ/MP  
Attachments

The primary purpose of school-approved student trips is to provide substantive curricular, co-curricular, and extracurricular enhancement not available in the local setting. It is not the intent of Policy #2340/AG #2340A to establish annual travel opportunities. Recognizing this purpose, consideration of trip approval begins with an evaluation of the special nature of the enrichment activities and the relationship of the trip's education goals to the curricular, co-curricular, or extracurricular activity.

If this trip requires **Portage PS transportation**, the form should be received by the transportation office **at least two (2) weeks** prior to the date of the trip. To allow for approval at all levels, it is recommended that this form be submitted **at least 3 weeks in advance**.

An itinerary must be submitted with any out-of-state overnight trip.

**International Trips:** If any duration of this trip is spent out of the country, the request needs to be submitted with **at least four (4) months' notice** to provide sufficient time to obtain all levels of approval. Please note that you may be asked to present your educational trip request to the Portage Board of Education for approval and no fundraising may begin until BOE approval is received.

**SECTION 1**


<b>School</b>	CHS	<b>Group</b>	Biology and Spanish students	<b>Date of Request</b>	5/10/2022 12:23:06
<b>Start Date</b>	Mon. 6/26/2023	<b>End Date</b>	Thurs. 7/6/2023	<b>Amount of Instructional Time Lost</b>	None
<b>Departure Time from School</b>	7:00:00 AM	<b>Return Time to School</b>	3:00:00 PM	<b>PPS Transportation?</b>	No
<b>Bus Loading/Van Pickup Time</b>		<b>Departure Time from Destination</b>		<b>ASN:</b>	
<b>Additional Details for Driver/Transprt. Dept.</b>					

**SECTION 2**

**Trip Destination:** Ecuador and the Galapagos Islands

**Educational Goal(s)/Purpose of Trip:**

Biology--Ecology and Evolution Standards and benchmarks  
 Evaluate the claims, evidence, and reasoning that the complex interactions in ecosystems maintain relatively consistent numbers and types of organisms in stable conditions, but changing conditions may result in a new ecosystem. \*\*  
 Design, evaluate, and refine a solution for reducing the impacts of human activities on the environment and biodiversity.\* \*\*  
 Evaluate the evidence for the role of group behavior on individual and species' chances to survive and reproduce.  
 Construct an explanation based on evidence for how natural selection leads to adaptation of populations.  
 Evaluate the evidence supporting claims that changes in environmental conditions may result in: (1) increases in the number of individuals of some species, (2) the emergence of new species over time, and (3) the extinction of other species  
 Spanish--It meets the cultural aspects of both the IB and non-IB curriculum, and it provides opportunities for students to practice their verbals skills in a Spanish speaking country.

 6/26/2023 Trip Request: CHS Biology and Spanish students Itinerary.pdf

**SECTION 3**

<b># of Students</b>	Unsure, but could be as many as 36	<b># of Staff Chaperones</b>	Depends on the number of students 1:6 ratio	<b># of Additional Adult Chaperones</b>	Possibly 1
<b># of Buses</b>		<b># of Lift Buses</b>		<b># of Vans</b>	
<b>Estimated Cost per Student</b>	\$3,999	<b>Funds Provided by</b>	Private/Family		
<b>Estimated Cost of Trip</b>	\$3999 per student, chaperone travel free	<b>Amount per Funding Source</b>	61		

Electronically complete sections below

**SUPERVISOR/PERSON OVERSEEING TRIP**

<b>Name</b>	Cathy Laurencig	<b>Contact Phone #</b>	269-330-5665 (Cathy's cell number)
Electronic Signature: <i>(employee overseeing trip needs to electronically sign below)</i> x Cathy Laurencig		Date: 5/10/22	

**Reminders: Forward to/Share with your principal for approval & attach any additional documentation if applicable (i.e., Itineraries, Benchmarks/Standards, Travel company contracts, etc.). Notify food services if trip conflicts with lunch.**

**Office Use ONLY:**

Principal Decision:	<input checked="" type="checkbox"/>	Approve	Principal Signature: <i>(electronically sign name below, or add e-signature)</i> x Eric Alburtus	Date: <i>(enter below)</i> 12 May 2022
	<input type="checkbox"/>	Deny		
Superintendent (or designee) Decision:	<input type="checkbox"/>	Approve	Supt. (or Designee) Signature: <i>(electronically sign name below, or add e-signature)</i> X	Date: <i>(enter below)</i>
	<input type="checkbox"/>	Deny		

Date Received by Transportation:

Received by:

**Assignment: Provided 1-5 days prior to trip**

Bus #:	<input type="text"/>	Driver:	_____	Bus #:	<input type="text"/>	Driver:	_____
Bus #:	<input type="text"/>	Driver:	_____	Bus #:	<input type="text"/>	Driver:	_____
Bus #:	<input type="text"/>	Driver:	_____	Bus #:	<input type="text"/>	Driver:	_____
Bus #:	<input type="text"/>	Driver:	_____	Bus #:	<input type="text"/>	Driver:	_____

**Routing:** Teacher signs, forwards email to Principal. Principal signs, forwards to [jjohnstone@portageps.org](mailto:jjohnstone@portageps.org). Inst Serv forwards to Transportation as needed

## **Documents included:**

Page 1:	Cover page
Pages 2-3:	Tentative Itinerary
Page 4:	Standards
Page 5:	IB Learner
Page 6:	Company insurance information



## **TOUR ITINERARY - Traveling with Explorica by World Strides**

### **Day 1 Hola Quito**

- Meet your tour director and check into hotel

### **Day 2 Quito landmarks**

- Quito guided sightseeing tour
- Independence Plaza, Palacio de Carondelet, San Francisco Church visit, Mitad del Mundo visit

### **Day 3 Quito--Galápagos**

- Fly to San Cristóbal Island
- Interpretation Center visit
- Tijeretas Bay excursion
- Coastal hike to Tijeretas Bay, see Frigatebirds, rays, sea lions
- Playa Mann beach time

### **Day 4 La Galapaguera & La Loberia excursion**

- La Galapaguera visit
- Observe giant tortoises endemic to San Cristóbal Island
- Hike to El Junco Lake
- La Loberia Beach excursion
- Snorkeling at La Loberia Beach, see sea lions, marine iguanas, blue-footed boobies & lava lizards

### **Day 5 San Cristóbal Island--Isabela Island**

- Transfer to Isabela Island via boat
- Primicias Ranch visit
- See giant tortoises
- View lava tunnels

### **Day 6 Sierra Negra Volcano excursion**

- Full-day guided Sierra Negra Volcano hike
- Puerto Villamil beach time

### **Day 7 Las Tintoreras excursion**

- Travel to Tintoreras via boat
- Las Tintoreras visit
- See marine iguanas, Galápagos penguins & Sally Lightfoot crabs
- Snorkeling adventure: See green sea turtles, white tip reef sharks, rays & multicolored fish
- See green sea turtles, white tip reef sharks, rays & multicolored fish
- Wetlands visit
- Playa del Amor, estuary tunnels, Wall of Tears visit
- Giant Tortoise Breeding Center guided visit
- Flamingo Lake walk

**Day 8 Isabela Island--Santa Cruz Island**

- Transfer to Santa Cruz Island via boat
- Darwin Research Station guided visit

**Day 9 Santa Cruz Island--Quito**

- Transfer to Baltra Island via Itabaca Canal
- Twin Craters visit
- Fly to Quito

**Day 10 End tour**

- La Mariscal artisanal craft market visit
- Fly home

**Day 11 Return home**

# **Language, culture, and connections:**

## **How travel abroad enhances student learning**

By participating in this trip, students will also be enriching their knowledge of the target culture and making connections to their own culture(s). Reading about and studying culture in textbooks is good, but experiencing it meaningfully is something completely different. While on this trip to Ecuador, students will be meeting the following state of Michigan World Language standards relating to culture and connections:

- C1.1N.SL.i Ask for and obtain information in everyday situations in the target language about time, place, price, size, relating to restaurants, stores, transportation, and services
- C1.2.A.L.b Understand interpersonal communication, spoken messages, interviews, group discussions and lectures in the target language on a variety of familiar and unfamiliar topics
- C4.1.A.c Recognize that register/honorifics reflect culture, and use this knowledge to adjust language accordingly and strengthen the understanding of both languages
- C4.1.A.d Recognize that phonological features (such as pronunciation, intonation, and tone) reflect culture, and use this knowledge to adjust language accordingly and strengthen the understanding of both languages.
- C4.2.A.a Describe the institutions, values, beliefs, and perspectives that serve as the foundation of the target culture practices and compare them to one's own.
- C5.2.A.a Seek opportunities and use the target language in real life situations within the community

## **Biology--Ecology and Evolution Standards and benchmarks**

- Evaluate the claims, evidence, and reasoning that the complex interactions in ecosystems maintain relatively consistent numbers and types of organisms in stable conditions, but changing conditions may result in a new ecosystem.

- Design, evaluate, and refine a solution for reducing the impacts of human activities on the environment and biodiversity.

- Evaluate the evidence for the role of group behavior on individual and species' chances to survive and reproduce.

- Construct an explanation based on evidence for how natural selection leads to adaptation of populations.

- Evaluate the evidence supporting claims that changes in environmental conditions may result in: (1) increases in the number of individuals of some species, (2) the emergence of new species over time, and (3) the extinction of other species

## IB LEARNER PROFILE

Travel abroad will not only strengthen the curriculum based on the state of Michigan's standards for World Languages and Biology, but will also enhance the learner profile based on the International Baccalaureate curriculum. Traveling to Ecuador will make IB learners:

- *Better inquirers:* Students' natural curiosity will be nurtured and encouraged while traveling abroad. Students will actively enjoy learning and will be engaged participants throughout the trip.
- *More knowledgeable:* They will gain in-depth knowledge of not only monuments, animals and attractions, but also the history, biology and culture that surround those monuments, animals and attractions.
- *Better communicators:* Students will have the opportunities to practice their Spanish and to understand the nuances of true communication, verbal and nonverbal.
- *More open-minded:* Students will see how differing values, perspectives, and traditions are expressed in another society, as well as how to better understand and appreciate their own culture(s) because of this. They will appreciate both cultural points of view.
- *More reflective:* Students will better understand their culture(s) and themselves. At the end of the trip, I ask students to do a reflection activity where they assess their own growth as a result of their new experiences abroad.



# CERTIFICATE OF LIABILITY INSURANCE

9/30/2022

DATE (MM/DD/YYYY)

5/6/2022

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 Lockton Companies 444 W. 47th Street, Suite 900 Kansas City MO 64112-1906 (816) 960-9000 kctsu@lockton.com	CONTACT NAME:	
	PHONE (A/C, No., Ext):	FAX (A/C, No.):
	E-MAIL ADDRESS:	
	INSURER(S) AFFORDING COVERAGE	NAIC #
	INSURER A: Arch Insurance Company	11150
	INSURER B: Zurich American Insurance Company	16535
	INSURER C: *** SEE ATTACHMENT ***	
	INSURER D:	
	INSURER E:	
	INSURER F:	

INSURED  
1437003  
LAKELAND TOURS, LLC  
DBA WORLDSTRIDES  
AND ITS SUBSIDIARIES  
218 WEST WATER STREET  
SUITE 400  
CHARLOTTESVILLE VA 22903

COVERAGES      CERTIFICATE NUMBER: 18504426      REVISION NUMBER: XXXXXXX

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	ADOL (BSO)	SUBR (BYD)	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 <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Y	N	TAP0198147	9/30/2021	9/30/2022	EACH OCCURRENCE \$ 10,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 10,000,000 GENERAL AGGREGATE \$ 10,000,000 PRODUCTS - COM/POP AGG \$ 10,000,000 \$
B	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY	Y	N	PRA1071630	9/30/2021	9/30/2022	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ XXXXXXXX BODILY INJURY (Per accident) \$ XXXXXXXX PROPERTY DAMAGE (Per accident) \$ XXXXXXXX \$ XXXXXXXX
C	UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$	Y	N	SEE ATTACHMENT	9/30/2021	9/30/2022	EACH OCCURRENCE \$ 40,000,000 AGGREGATE \$ 40,000,000 \$ XXXXXXXX
B	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	N/A	WC1071628 WC0797564	9/30/2021 9/30/2021	9/30/2022 9/30/2022	<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
A	PROFESSIONAL LIABILITY & ABUSIVE ACTS	N	N	TAP0196147	9/30/2021	9/30/2022	EACH CLAIM: \$10M AGGREGATE: \$10M ABUSIVE ACTS: \$2M OCC./\$2M AGG.

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
 R.E: JUNE 26, 2023 - JULY 6, 2023 PORTAGE CENTRAL HIGH SCHOOL IS NAMED AS ADDITIONAL INSURED AS RESPECTS TO LIABILITY COVERAGES ARISING OUT OF THE ACTIVITIES PERFORMED BY OR ON BEHALF OF THE NAMED INSURED AS PER WRITTEN AGREEMENT, SUBJECT TO POLICY TERMS, CONDITIONS AND EXCLUSIONS.



Information and Technology Systems  
8107 Mustang Drive, Portage, MI 49002  
(269) 323-5100 -- help@portageps.org

## MEMO

---

To: Mark Bielang, Superintendent  
Fr: Daniel J. Vomastek, Director  
Dt: May 11th, 2022  
Re: Recommended Purchase - Staff Desktops

---

### RECOMMENDATION

I recommend the Board of Education authorize the purchase of 500 desktop computers from Presidio in an amount not to exceed \$202,500, proceeds being drawn from the 2021 Bond Fund.

### BACKGROUND

The bulk of our existing fleet of staff desktop computers are now end of life and for the most part unrepairable due to a lack of parts given the age of the units. This purchase will be used as a planned replacement. The bulk of these units will be used as the central computer in classroom instruction systems.

These computers are Windows-based. I was hoping to move to Chromeboxes, the desktop equivalent of a Chromebook. While the hardware cost is nearly the same, ChromeOS devices are easier to manage and maintain. However, for the intended use of these devices, there are still a few Windows-only apps our staff prefer. We are not quite yet ready for the culture shift.

### AWARD INFORMATION

This quote comes from a state contract, and as such an RFP was not required.

I would be happy to answer any other questions you or the Board may have.



## Desktops



Email



Copy to  
Clipboard



Print

## Summary [Back](#)

Presidio	\$202,500.00
Total	\$202,500.00

Item	Details	Quantity	Price	Total
22220040	<b>Name:</b> Dell Optiplex 3090 Micro <b>MFG Model:</b> Dell 3090 MFF <b>Reseller Number:</b> 22223400 <b>Contract Expiration:</b> 9/30/2022 <b>Item Description:</b> Dell Optiplex 3090 MFF: Intel Core i5-10500T processor, 8GB RAM, 256GB SSD storage, Windows 11/10 Pro, 10/100/1000, Wireless Driver, Intel Wi-Fi 6 AX201, Dual-band 2x2 802.11ax, 5 total USB ports: Front: 1 - USB 3.2 Gen1 Type-A ports, Rear: 3 - USB 3.2 Gen1 Type-A ports, 1 - USB 3.2 Gen1 Type-A port with Smart Power On, (2) DisplayPorts 1.4, USB keyboard, USB mouse. Dell 3/3/3 onsite warranty. Delivery: 55 calendar days ARO.	500	\$405.00	\$202,500.00
<b>Vendor Total</b>				<b>\$202,500.00</b>

**Vendor Name:** Presidio

**Vendor URL:**

**Vendor Notes:** Presidio W-9

### Vendor Contacts:

Bri Hartline  
 6355 East Paris SE  
 Caledonia, MI 49316  
 Phone: 2484680733  
 Fax:  
 Email: [bhartline@presidio.com](mailto:bhartline@presidio.com)

### Vendor Contacts:

Customer Service  
 48325 Alpha Drive  
 Suite 150  
 Wixom, MI 48393  
 Phone: 2484680733  
 Fax:  
 Email: [dellremc@presidio.com](mailto:dellremc@presidio.com)

### Vendor Contacts:

Avigilon Sales  
 48325 Alpha Dr  
 Suite 150  
 Wixom, MI 48393  
 Phone: 248.679.3208  
 Fax:  
 Email: [mcamps@presidio.com](mailto:mcamps@presidio.com)

**PORTAGE PUBLIC SCHOOLS  
BOARD OF EDUCATION – COMMITTEE OF THE WHOLE WORK SESSION  
PORTAGE CENTRAL HIGH SCHOOL, ROOM #1136  
JUNE 13, 2022, 6:30 P.M.**

**Note Page**

**VII Assurance of District Performance**

1. Monitoring Report 1.0, Ends (GP 4.4)

**Recommended Motion:**

**Motion offered by \_\_\_\_\_, seconded by \_\_\_\_\_, that the Board of Education accept as presented, the Monitoring Report on 1.0, Ends, as a reasonable interpretation and evidence of compliance with policy.**


**Portage Public Schools  
Monitoring Report**

Policy Type: Ends  
Policy Title: (1.0) Global Ends

**Certification**

I hereby present my Monitoring Report on Global Ends Policy, 1.0 in accordance with the monitoring schedule established by the Board. I certify that the information provided in this report is true as of June 13, 2022.

  
\_\_\_\_\_  
Signature

  
\_\_\_\_\_  
Date

Monitoring Report

Page -2-

Policy Type: Ends

Policy Title: (1.0) Global Ends

### **1.0 POLICY LANGUAGE**

Portage Public Schools will educate all students to achieve their potential, at a level such that the results justify the costs.

#### **Interpretation**

I submit the Board's policy language has been comprehensively interpreted and prioritized, and data submitted to quantify the conclusion statements. Reports have been submitted and accepted by the Board of Education according to the monitoring schedule established by the Board.

#### **Report**

The District is completing its eighth year of monitoring its Ends Policies. During the 2021-22 school year, Monitoring Reports were presented for four of the five sub-ends policies, which serve to further interpret the Board's Global Ends Policy. Also, during the 2021-22 school year the Board revised and renumbered some of the sub-ends policies. This report reflects the revisions and renumbering approved by the Board. Please note, that revisions to policies created a new sub-end: 1.3 - Resilience in Life, which was not monitored during the 2021-22 monitoring cycle, and deleted a sub-end: 1.5 - Service to Community, which also was not monitored during the 2021-22 monitoring cycle.

Approximately 60 data measures are presented for the Global Policy sub-ends. Attached is a summary of the monitoring data measures presented for each of the sub-ends (Appendix I).

#### **Compliance Statement**

The Board approved all sub-end Monitoring Reports (1.1, 1.2, 1.4, and 1.5) as reasonable interpretations and evidence of compliance with Policy.

## APPENDIX I

### **1.1 - Academic Success (Oct 2021-Jan 2022)**

#### Acadience

- Acadience 3rd Grade Oral Reading Fluency – latest 5-year trend
- Acadience Cohort – Students Meeting Benchmark Oral Reading Fluency – latest 3-year trend

#### M-STEP (Grade 5)/PSAT (Grade 8)

##### English Language Arts

- All students – 5<sup>th</sup> grade vs. comparable communities - % proficient
- All students – 8<sup>th</sup> grade vs. comparable communities - % proficient
- Economically disadvantaged – 5<sup>th</sup> grade vs. comparable communities - % proficient
- Economically disadvantaged – 8<sup>th</sup> grade vs. comparable communities - % proficient
- Race/ethnicity – 5<sup>th</sup> grade vs. comparable communities - % proficient
- Race/ethnicity – 8<sup>th</sup> grade vs. comparable communities - % proficient

##### Math

- All students - 5<sup>th</sup> grade vs. comparable communities – % proficient
- All students - 8<sup>th</sup> grade vs. comparable communities - % proficient
- Economically disadvantaged - 5<sup>th</sup> grade vs. comparable communities - % proficient
- Economically disadvantaged - 8<sup>th</sup> grade vs. comparable communities - % proficient
- Race/ethnicity – 5<sup>th</sup> grade vs. comparable communities - % proficient
- Race/ethnicity – 8<sup>th</sup> grade vs. comparable communities - % proficient

##### Trend Data

- Three-Year Growth Comparisons (ELA and Math) – 5<sup>th</sup> grade and 8<sup>th</sup> grade

#### SAT

##### SAT Evidence Based Reading/Writing

- All students – 11<sup>th</sup> grade vs. comparable communities - % college ready
- Economically disadvantaged – 11<sup>th</sup> grade vs. comparable communities – % college ready
- Race/ethnicity - 11<sup>th</sup> grade vs. comparable communities – % college ready

## Monitoring Report

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Policy Type: Ends

Policy Title: (1.0) Global Ends

### SAT Math

- All students - 11<sup>th</sup> grade vs. comparable communities - % college ready
- Economically disadvantaged students - 11<sup>th</sup> grade vs. comparable communities - % college ready
- Race/ethnicity - 11<sup>th</sup> grade vs. comparable communities - % college ready

### SAT Evidence Based Reading/Writing and Math

- All students - 11<sup>th</sup> grade vs. comparable communities – total score average
- Economically disadvantaged – 11<sup>th</sup> grade vs. comparable communities – total score average
- Race/ethnicity - 11<sup>th</sup> grade vs. comparable communities – total score average

### Trend Data

- SAT Five-year trend data with comparable communities - Evidence Based Reading and Writing and Math (all students/economically disadvantaged/Black/African American)

### **1.2 - Learning and Leadership Skills (March 2022)**

- Number of students in at least one AP Course
- Number of students in at least one AP Course by grade
- Number and percentage of AP students earning a “C” or better by grade
- Number of AP Exams taken
- Number and percentage of AP Exams in which a “3” or better earned
- Number of students taking at least one IB course by grade
- Number and percentage of IB students earning a “C” or better by grade
- Number and percentage of students earning an IB diploma
- Number of IB exams taken
- Number and percentage of IB exams in which a “3” or better earned
- Number and percentage of 7-12 students enrolled in arts/physical education/technology/Education for Employment/Education for the Arts/Kalamazoo Area Math and Science Center
- Number and listing of extra-curricular offerings and participation rates
- Student engagement scores on select items (not provided in 2020-21 and 2021-22; survey not administered)

### **1.3 - Resilience in Life (New sub-end not monitored during the 2021-22 school year)**

### **1.4 - Post Graduation Success (May 2022)**

- College enrollment within 6 months of graduation
- College enrollment within 12 months of graduation
- College enrollment within 24 months of graduation

Monitoring Report

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Policy Type: Ends

Policy Title: (1.0) Global Ends

- 24 credits completed within 12 months of graduation
- 24 credits completed within 24 months of graduation
- 24 credits completed within 36 months of graduation
- Number and percentage of students taking Remedial College Classes
- High School Graduation/Drop-out rates (5-year cohort)
- High School Graduation/Drop-out rates (4-year cohort)
- Comparator Schools 4-Year Cohort Graduation Rate
- Enrollment information for Education for Employment Classes
- Number and percentage of students earning ACT WorkKeys Certificate

**1.5 Responsible Citizens (February 2022)**

- Listing of activities promoting ethical behavior
- Listing of activities, events and practices promoting respect for individual differences
- Listing of activities and events demonstrating respect for cultures other than their own
- Diversity in our schools and workforce
- Number and percentage of truant students
- Number and percentage of students committing physical assaults
- Number and percentage of students illegally possessing
- Number and percentage of students committing larceny
- Average Daily Student Attendance

## Monitoring Report Evaluation Form

Policy: \_\_\_\_\_

Is the Superintendent's interpretation reasonable? Yes  No

Comments:

Is evidence of compliance reasonable? Yes  No

Comments:

---

### Comments Regarding Further Policy Development

1. Do you have a concern that is not addressed in this policy?
  
  
  
  
  
  
  
  
  
  
2. What policy language would address your concern?

Evaluation submitted to Board President By: \_\_\_\_\_

Adopted: 9/22/08  
Revised: 5/25/09, 3/22/10, 2/26/18

**PORTAGE PUBLIC SCHOOLS  
BOARD OF EDUCATION – COMMITTEE OF THE WHOLE WORK SESSION  
PORTAGE CENTRAL HIGH SCHOOL, ROOM #1136  
JUNE 13, 2022, 6:30 P.M.**

**Note Page**

**VII Assurance of District Performance**

2. Monitoring Report 2.0, Global Executive Constraint (GP 4.4)

**Recommended Motion:**

**Motion offered by \_\_\_\_\_, seconded by \_\_\_\_\_, that the Board of Education accept as presented, the Monitoring Report on 2.0, Global Executive Constraint, as a reasonable interpretation and evidence of compliance with policy.**

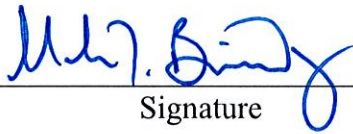
**Portage Public Schools  
Monitoring Report**

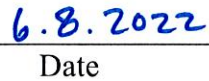
Policy Type: Executive Limitation  
Policy Title: (2.0) Global Executive Constraint

**Certification**

I hereby present my Monitoring Report on Executive Limitation, 2.0, “Global Executive Constraint” in accordance with the monitoring schedule established by the Board. I certify that the information provided in this report is true as of June 13, 2022.

There has been no change in interpretation since the last report.

  
\_\_\_\_\_  
Signature

  
\_\_\_\_\_  
Date

Monitoring Report

Page -2-

Policy Type: Executive Limitation

Policy Title: (2.0) Global Executive Constraint

## **2.0 POLICY LANGUAGE**

The Superintendent shall not cause or allow any practice, activity, decision, or organizational circumstance which is either unlawful, unsafe, imprudent, or in violation of commonly accepted business, educational and professional ethics and practices.

### **Interpretation**

I interpret “unlawful, unsafe, or imprudent” to mean:

Any situation which violates Executive Limitations, any on-going violation of District Operational Policies, or any failure to adopt any policy required by law or governmental regulation.

Compliance is characterized by:

1. Adoption and dissemination to the appropriate staff members of all of the Policies required by law and governmental regulation.
2. Compliance with Executive Limitations 2.1 through 2.11 as submitted through Monitoring Reports to the Board for each monitoring cycle. (Please note that Executive Limitation Policy 2.7 was deleted by the Board on December 8, 2014.)

The interpretation is reasonable because sub-policies subsequent to Global Executive Constraint 2.0 further speak to the actions which are unacceptable, imprudent, unsafe, or unlawful. The most recent monitoring cycle is used as a basis for compliance. Finally, the failure to adopt legally required policies places the District in greater risk of being found to have acted unlawfully, contrary to governmental regulations, or contrary to community accepted business, educational and professional ethics and practices.

### **Report**

1. NEOLA Operational Policies have been Board approved and disseminated to appropriate staff. Revisions and updates to Operational Policies were provided to and approved by the Board.
2. Monitoring Reports for Executive Limitations Policies 2.1 through 2.11 (except 2.7 as previously noted) submitted during the monitoring report cycle were all approved by the Board as a reasonable interpretation and evidence of compliance with Board Governance Policies.

## Monitoring Report

Page -3-

Policy Type: Executive Limitation

Policy Title: (2.0) Global Executive Constraint

3. Additionally, Executive Limitation 2.10.10a. requires a monthly summary of financial performance presented at the Regular Monthly BOE meeting. These summaries were presented throughout the year as required. Executive Limitation 2.10.10.b. requires an annual report on safety. This report was last presented in June 2021 at the meeting held to conduct the Superintendent's evaluation.

### **Compliance Statement**

The organization met expectations.

### **Interpretation**

I interpret "in violation of commonly accepted business, educational and professional ethics and practices" to mean those ethics and practices identified in:

1. Executive Limitations 2.1 through 2.11 as established by the Board.
2. District Operational Policies and Guidelines that address the following topics:
  - Ethics, conflict of interest and nepotism
  - Bidding/Procurement Procedures
  - Internal controls for processing financial transactions

Compliance is interpreted as:

1. Having Operational Policies/ Guidelines /procedures in place that address conflicts of interest, nepotism, bidding/procurement procedures, and internal controls for financial transactions.
2. Dissemination of Operational Policies/ Guidelines /procedures and training of appropriate administrative and supervisory staff as needed.
3. Annual audits to determine compliance.

### **Report**

1. All Operational Policies are Board approved and have been reviewed by administration. Guidelines that support the Board adopted Operational Policies are in place.
2. All Policies have been disseminated to appropriate staff and training, as necessary, has taken place.
3. The annual financial audit found no issues of concern or non-compliance.

### **Compliance Statement**

The organization met expectations.

## Monitoring Report Evaluation Form

Policy: \_\_\_\_\_

Is the Superintendent's interpretation reasonable? Yes  No

Comments:

Is evidence of compliance reasonable? Yes  No

Comments:

---

### Comments Regarding Further Policy Development

1. Do you have a concern that is not addressed in this policy?
  
  
  
  
  
  
  
  
  
  
2. What policy language would address your concern?

Evaluation submitted to Board President By: \_\_\_\_\_

Adopted: 9/22/08  
Revised: 5/25/09, 3/22/10, 2/26/18

**PORTAGE PUBLIC SCHOOLS  
BOARD OF EDUCATION – REGULAR BUSINESS MEETING  
PORTAGE CENTRAL HIGH SCHOOL, ROOM #1136  
MAY 23, 2022, 6:30 P.M.**

**Note Page**

**VIII. Required Action Items**

1. MI High School Athletic Association Membership Renewal (MHSAA)

**Recommended Motion**

**Motion offered by \_\_\_\_\_, seconded by \_\_\_\_\_, that the Board of Education approve the 2022-23 Michigan High School Athletic Association Membership Resolution, as presented.**

June 13, 2022



# 2022-23

1661 Ramblewood Drive  
East Lansing, MI 48823  
(517) 332-5046

The Michigan High School Athletic Association is a voluntary, nonprofit corporation comprised of public, private and parochial junior high/ middle and senior high schools whose Boards of Education/Governing Bodies have voluntarily applied for and received membership for and on behalf of their secondary schools. The association sponsors statewide tournaments and makes eligibility rules with respect to participation in such Michigan High School Athletic Association sponsored tournaments in the various sports. Each Board of Education/Governing Body that wishes to host or participate in such meets and tournaments must join the MHSAA and agree to abide by and enforce the MHSAA rules, regulations and qualifications concerning eligibility, game rules and tournament policies, procedures and schedules. **It is a condition for participation in any MHSAA postseason tournaments that high schools adhere to at least the minimum standards of Regulation I and the maximum limitations of Regulation II in ALL MHSAA Tournament sports.**

Michigan High School Athletic Association tournaments are the collective property of the MHSAA and not of any individual member school. The MHSAA reserves the right to promote and advance the membership's interests with publication information; exclusive arrangements to create recognition and exposure for school-sponsored activities; restrictive policies prohibiting exploitation and commercialization of MHSAA-sponsored tournaments; appropriate proprietary interests, and the use of images or transmissions identifying contest officials, spectators and member schools' students, personnel and marks.

To obtain membership, it is necessary for the Board of Education/Governing Body to adopt the following resolution for its junior high/middle and senior high schools. This resolution must be formally ratified by your Board of Education/Governing Body and properly signed. Please return one signed copy for our files and retain one copy for your files. Resolutions that are modified in any way or are supplemented with letters placing additional conditions on MHSAA membership or tournament participation shall be rejected.

## MEMBERSHIP RESOLUTION

For the year August 1, 2022 — through July 31, 2023

### LIST ON BACK

\_\_\_\_\_ the School(s) which are under the direction of this Board of Education/Governing Body.

***(Junior high/middle and senior high schools of your school system which are to be listed as MHSAA members and receive MHSAA mailings during 2022-23 must be listed on the back of this form)***

Portage Public Schools \_\_\_\_\_ City/Township of Portage \_\_\_\_\_

County of Kalamazoo \_\_\_\_\_, of State of Michigan, are hereby:

(A) enrolled as members of the Michigan High School Athletic Association, Inc., a nonprofit association, and

(B) are further enrolled to participate in the approved interschool athletic activities sponsored by said association.

The Board of Education/Governing Body hereby delegates to the Superintendent or his/her designee(s) the responsibility for the supervision and control of said activities, and hereby accepts the Constitution and By-Laws of said association and adopts as its own the rules, regulations and interpretations (as minimum standards), as published in the current *HANDBOOK* as the governing code under which the said school(s) shall conduct its program of interscholastic athletics and agrees to primary enforcement of said rules, regulations, interpretations and qualifications. In addition, it is hereby agreed that schools which host or participate in the association's meets and tournaments shall follow and enforce all tournament policies, procedures and schedules.

This authorization shall be effective from August 1, 2022 and shall remain effective until July 31, 2023, during which the authorization may not be revoked.

### RECORD OF ADOPTION

*The above resolution was adopted by the Board of Education/Governing Body of the*

Portage Public \_\_\_\_\_ School(s), on the \_\_\_\_\_ day of \_\_\_\_\_ June \_\_\_\_\_, 2022,  
and is so recorded in the minutes of the meeting of the said Board/Governing Body.

Portage Public Schools \_\_\_\_\_

(Governing Body Name)  
8107 Mustang Drive \_\_\_\_\_

(Address)  
Portage, MI 49002 \_\_\_\_\_

(City & Zip Code)

mbielang@portageps.org \_\_\_\_\_

(Contact E-mail)

\_\_\_\_\_  
Board Secretary Signature  
or Designee

Check if Designee

# Schools Which Are To Be MHSAA Members During 2022-23

**NOTE:** Pursuant to the MHSAA Constitution, all high schools, junior high/middle schools, or other schools of Michigan doing a grade of work corresponding to such schools, may become members of this organization provided (a) the school building has enrollment and onsite attendance of at least 15 students, whether for grades 6 through 8 or 9, grades 7 through 8 or 9, or grades 9 or 10 through 12; and (b) if a nonpublic school, the school qualifies for federal income tax exemption as a not-for-profit organization. To reach the 15-student minimum for middle school membership, schools may join the MHSAA at the 6th-grade level whether or not 6th-grade students participate in athletics.

- A. This Section does not require school districts to become member schools at the junior high/middle school level and does not require school districts to sponsor any interscholastic athletics for 6th-grade students.
- B. If a school district's MHSAA Membership Resolution lists a junior high/middle school as an MHSAA member school, and if the school sponsors a 6th-grade team in any sport or permits a 6th-grade student to participate with 7th- and/or 8th-grade students in any sport, then all of Regulations III and IV apply to all 6th-graders in all sports involving 6th-graders on teams sponsored by that school. If the school does not allow any 6th-graders to participate in a sport, MHSAA rules do not apply in that sport.

## Name the Member High School(s)

List separately from JH/MS even if all grades are housed in the same building.

1. Portage Central High School
2. Portage Northern High School
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_
11. \_\_\_\_\_
12. \_\_\_\_\_
13. \_\_\_\_\_
14. \_\_\_\_\_
15. \_\_\_\_\_

**If necessary, list additional schools for either column on a separate sheet.**

## Name the Member Junior High /Middle School(s)

*(member 6th, 7th and 8th-grade buildings)*

List separately from HS even if all grades are housed in the same building.

1. Central Middle School  

Name of Member School

Configuration of grades in building (e.g. K-6, 6-8, 7-8, 7-9): 6-8

Provide anticipated 2022-23 7th and 8th-grade enrollment 506

Provide anticipated 2022-23 6th-grade enrollment 232

  1. **Yes or No (circle one)** 6th-graders will be participating in at least one sport with 7th and 8th graders. If yes, and not housed in the same building, add the name of the building that houses 6th-graders on the line below.  
  
\_\_\_\_\_
  
2. North Middle School  

Name of Member School

Configuration of grades in building (e.g. K-6, 6-8, 7-8, 7-9): 6-8

Provide anticipated 2022-23 7th and 8th-grade enrollment 386

Provide anticipated 2022-23 6th-grade enrollment 210

  1. **Yes or No (circle one)** 6th-graders will be participating in at least one sport with 7th and 8th graders. If yes, and not housed in the same building, add the name of the building that houses 6th-graders on the line below.  
  
\_\_\_\_\_
  
3. West Middle School  

Name of Member School

Configuration of grades in building (e.g. K-6, 6-8, 7-8, 7-9): 6-8

Provide anticipated 2022-23 7th and 8th-grade enrollment 436

Provide anticipated 2022-23 6th-grade enrollment 224

  1. **Yes or No (circle one)** 6th-graders will be participating in at least one sport with 7th and 8th graders. If yes, and not housed in the same building, add the name of the building that houses 6th-graders on the line below.  
  
\_\_\_\_\_

**PORTAGE PUBLIC SCHOOLS  
BOARD OF EDUCATION – COMMITTEE OF THE WHOLE WORK SESSION  
PORTAGE CENTRAL HIGH SCHOOL, ROOM #1136  
JUNE 13, 2022, 6:30 P.M.**

**Note Page**

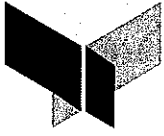
**X. Discussion Items**

3. MASB Membership Renewal (MASB)

In the past, the Board has opted to approve membership renewal without the Dues Plus option. Per the enclosed information, if the Board opts to continue its membership for 22-23 without the Dues-Plus option, the renewal total would be \$9,690. If the Board desires to renew with the Dues Plus option of \$2,000, the renewal total would be \$11,690.

This item will return to the Board for action at the June 27, 2022 meeting. The Board is asked when making a motion to renew, to state the membership renewal selected (with or without Dues-Plus) and the corresponding renewal total.

June 13, 2022



**MASB**  
MICHIGAN ASSOCIATION  
OF SCHOOL BOARDS

**INFO@MASB.ORG | MASB.ORG | 517.327.5900**

**1001 Centennial Way, Suite 400 • Lansing, Michigan 48917-8249**

May 13, 2022

Mark Bielang, Superintendent  
Portage Public Schools  
8107 Mustang Dr  
Portage, MI 49002-5577

Dear Superintendent Bielang,

On behalf of the Michigan Association of Schools Boards' Board of Directors and staff, I want to thank you for the opportunity to support, promote and enhance the important service and leadership your district provides for Michigan's public schools and students.

As MASB remains committed to serving your district through advocacy, information sharing, legal service and more, we ask that you remain committed to MASB. The renewal period for your district's MASB membership is now open.

Your district's membership includes access to many members-only tools and cost savings such as:

- **SET SEG**—Health benefits consultation, a property/casualty pool and workers' compensation fund are all available. Your district received \$98,698.93 in savings this past year.
- **Lobbying**—MASB Government Relations staff is advocating every day on behalf of public school districts to preserve the School Aid Fund and reduce unnecessary increases to your budget.
- **Legal Counsel Consultation**—MASB Legal Counsel Brad Banasik, J.D. and Assistant Director of Labor Relations and Legal Services Dan Feinberg, J.D. are available to work through any concerns.
- **Member Assistance Fund**—This service provides assistance to our most financially uncertain districts to access MASB training and services.
- **Board Development**—Member rates on Board Member Certification (CBA) classes, workshops, and other learning opportunities and services.
- **Resources that will help your board and administrators**—*LeaderBoard* magazine, an Open Meetings Act Guide, timely legislative updates and more.

MASB is committed to providing great value for your current and emerging needs. Our goal is to help you spend more of your time making a difference in your district and community and

enhancing your ability to positively impact your students. We invite you to join your peers in maintaining a powerful voice in the education dialogue as members of MASB.

Your district's dues invoice is enclosed and we request that it be approved by your board and submitted by June 30, 2022. While we have not increased dues since 2019, please note that this reflects a 3% increase to deal with the increased costs we are seeing as an Association. A notification letter has also been sent to your Board President.

If you have any questions, please call us at 517.327.5900.

Sincerely,



Don P. Wotruba, CAE  
Executive Director

# DUES<sup>+</sup> PrePay



Streamline your decisionmaking and save money with MASB's Dues-Plus prepaid services.

## Dues-Plus Video

PrePay: \$2,000

MASB can help you tell your district's story through the power of video.

We'll customize a video for you that will help your district connect with the community, market to students and families, and attract personnel.

Receive up to a five-minute video, one day of in-district recording (plus reimbursement of travel expenses) and three rounds of edits.

**Value: \$4,000**

### THE FINE PRINT

Select and prepay for the desired number of board services on the enclosed dues invoice. Prepaid services can be used any time between July 1, 2022 - June 30, 2023. Standard mileage and travel expenses apply; additional discounts not applicable.



1001 Centennial Way Suite 400  
Lansing, Michigan 48917-8249

**INVOICE**

**MASB**  
MICHIGAN ASSOCIATION  
OF SCHOOL BOARDS

517.327.5900  
Fed.ID # 38-1323441

**2022-2023 MEMBERSHIP RENEWAL NOTICE**

Mark Bielang  
Portage Public Schools  
8107 Mustang Dr  
Portage, MI 49002-5577

District Number: 39140  
Date: 4/22/22

The Michigan Association of School Boards appreciates the membership of your school district for the fiscal year 2022-2023 which begins July 1.

<b>YOUR MDE AUDITED FALL PUPIL COUNT:</b>	<b>8669</b>	
<b>MASB SCHOOL DISTRICT 2022-2023 MEMBERSHIP:</b>		<b>\$9,253</b>
<b>LEGAL TRUST FUND ANNUAL RENEWAL CONTRIBUTION:</b>		<b>\$437</b>
<b>DUES RENEWAL SUBTOTAL:</b>		<b>\$9,690</b>

**Dues Plus Choices \***

Video: QTY: \_\_\_\_\_ x Price: \$2,000 = \_\_\_\_\_

Add Dues Renewal Subtotal to Dues Plus Choices for **Grand Total Payable to MASB: \$** \_\_\_\_\_

*\*See enclosure for details on this special offer.*

**DIRECT FINANCIAL BENEFITS OF MEMBERSHIP:**

One of the many benefits of membership with MASB is the ability for our members to participate in the SET-SEG insurance pools. In addition to competitive rates, many of our member districts enjoy significant workers' compensation premium reductions and property casualty net asset returns.

**Last year your participation resulted in returns of \$98,698.93 to your district.**

Please forward payment and copy of this invoice no later than June 30, 2022 to:  
MASB, 1001 Centennial Way, Suite 400, Lansing, MI 48917-8249 Questions? Call 517-327-5900

**PORTAGE PUBLIC SCHOOLS  
BOARD OF EDUCATION – COMMITTEE OF THE WHOLE WORK SESSION  
PORTAGE CENTRAL HIGH SCHOOL, ROOM #1136  
JUNE 13, 2022, 6:30 P.M.**

**Note Page**

**IX. Action Items**

1. New Administrator Appointments (OP 3120)



Bradley D. Galin, MBA, SPHR  
Director of Human Resources  
Phone: 269.323.5152  
[bgalin@portageps.org](mailto:bgalin@portageps.org)

To: Board of Education  
From: Bradley Galin, MBA, SPHR  
Date: June 13, 2022  
Re: Administrator Appointment Recommendations

---

**RECOMMENDATION:**

It is recommended that the Board of Education approve the appointment of the following administrators for the Portage Public Schools for the 2022-2023 school year.

**Aja Kaylor:**

Ms. Kaylor is being recommended as the new Assistant Principal for Central High School, replacing Jason Frink who is returning to the classroom at CHS. Ms. Kaylor has taught science in the Portage Public Schools since 2002, spending all but this past year at Central High School. Ms. Kaylor also plays a pivotal role with her coordination of all the intern teachers placed in any of our secondary buildings.

Ms. Kaylor completed her undergraduate work in education at Western Michigan University and obtained her Masters in Educational Leadership from Grand Valley State University. Ms. Kaylor will be initially placed on Step 1 of the high school assistant principal pay scale, currently \$89,864.

**Jennifer Swank:**

It is recommended that the Board approve Ms. Jennifer Swank to the new position of Dean of Students at Portage Community High School. Ms. Swank has been a teacher at Community High for 14 years and has been instrumental in managing the after-school and on-line programs for much of that time. As the District has watched the needs of our students increase while simultaneously needing to meet additional state regulations relating to alternative education, the necessity of this role has become apparent.

Ms. Swank's educational background includes an Associate's Degree from Kalamazoo Valley Community College, a Bachelor's in Education from Western Michigan University, and a Masters in Educational Leadership from Cornerstone University. Ms. Swank's initial salary as Dean of Students will be \$84,264.93.

**PORTAGE PUBLIC SCHOOLS  
BOARD OF EDUCATION – COMMITTEE OF THE WHOLE WORK SESSION  
PORTAGE CENTRAL HIGH SCHOOL, ROOM #1136  
JUNE 13, 2022, 6:30 P.M.**

**Note Page**

**X. Discussion Items**

1. 2021-22 Final Budget Amendments (OP 6231)
  - a. General Fund Budget Amendment #2
  
  
  
  
  
  
  
  
  
  
  - b. Building & Site Sinking Fund Budget Amendment #1
  
  
  
  
  
  
  
  
  
  
  - c. Debt Retirement Fund Budget Amendment #1
  
  
  
  
  
  
  
  
  
  
  - d. School Service Fund Budget Amendment #



To : Mark Bielang, Superintendent  
From : Paula Johnson, Director of Finance  
Date : June 10, 2022  
Subject: General Fund Budget Amendment #2 Resolution for 2021/22

**Recommendation**

That the Board of Education approve the attached budget amendment resolution to the General Appropriations Act (General Fund) for the 2021/22 year at the June 27, 2022 Board meeting.

**Background Information**

The 2021/2022 fiscal year still continues to be a year dealing with some COVID-19 issues while still delivering quality instruction to our students. This amendment reflects any changes since the last amendment in February to the General Fund. Below are a couple of main points:

1. This budget year has received several federal and state grant fund sources on a one-time basis in addition to the normal per pupil foundation allowance. The addition of ESSER III funding and a Childcare Stabilization Grant have been added into this amendment since February.
2. Based on analysis of all revenues and expenses at year end, the General Fund expenses are predicted to exceed revenues by approximately \$486,220 with a projected fund balance as a percentage of expenditures of 11.62% up very slightly from the February amendment of 11.53%.

The amendment to the District's General (Operating) Fund represents the second and final planned revision during this school year. Typically, the budget is amended each year in February and June. The extensive amendment process demonstrates our continuous budget cycle that updates the Board, staff, and community as improved information becomes available.

Our goals in completing this amendment are two-fold:

1. Informs the Board of Education on the status of carryover funds available for the upcoming fiscal year.
2. Facilitates the administration's preparation of projections made in the General Fund preliminary budget and ultimately the final budget document for 2022/23.

After all of the proposed changes are considered, the revised budget reflects excess expenditures over revenues of **(\$486,220)** for the year, as compared to **(\$840,699)** which was adopted in February. The largest portions of the net change are identified as follows:

<b>Revisions</b>	<b>Amount</b>
<b>Revenues:</b>	<b>(\$ rounded)</b>
<p><b>Local:</b>                      Delinquent property tax revenue, athletic gate receipts, miscellaneous revenue and the enhancement mileage have all increased since the February amendment.</p>	<b>\$346,503</b>
<p><b>State:</b>                      Additional state aid received due to the change in taxable values. Increase in the MSPERS 147a2 categorical and MSPERS 147e. One time state aid payment for benchmark assessment was received. Mental Health and Support Services and the At Risk grants were increased.</p>	<b>\$616,335</b>
<p><b>Federal:</b>                      Title I, Title II, Title III and Title IV grants were all adjusted to current year awards due to a later than normal approval process. ESSER III funding and the Childcare Stabilization Grant were also received</p>	<b>\$1,639,919</b>
<p><b>Incoming Transfers &amp; Other Transactions:</b>                      Reduction of the indirect costs that can be charged to Food Service along with an increase in the sale of district property for buses online.</p>	<b>(\$12,086)</b>
<b>Revenue Subtotal -</b>	<b>\$2,590,671</b>
<b>Expenditures:</b>	
<p>Salaries for all groups have been analyzed and adjusted since the February amendment. This includes one time grant related payments from ESSER III and the Child Care Stabilization Grant.</p>	<b>\$478,954</b>
<p>Health, dental, vision, life, and LTD costs have all been updated to reflect current employee elections at known rates after applying any hard caps. Corresponding FICA and retirement benefit costs have also been updated.</p>	<b>\$63,676</b>
<p>Purchased services costs have increased due to several factors; increased costs for substitutes, added mental health and support services, Child Care Stabilization Grant one time stipends, coaching costs and Title II professional development.</p>	<b>\$1,515,118</b>
<p>Supply costs and capital outlay purchases were revised to align with spending at year end. All utilities and district fuel costs have been updated. Capital outlay costs have increased due to federal grant spending.</p>	<b>\$178,444</b>
<b>Expense Subtotal -</b>	<b>\$2,236,192</b>
<b>Total revisions accounted for in these items</b>	<b>\$354,479</b>

**PORTAGE PUBLIC SCHOOLS  
GENERAL FUND BUDGET APPROPRIATIONS RESOLUTION  
2021/22 AMENDED BUDGET #2**

Be it resolved that this resolution shall be the General Fund appropriations of Portage Public Schools for the fiscal year 2021/22. A resolution to make appropriations; to provide for the expenditures of appropriations; and to provide for the disposition of all revenue received by Portage Public Schools.

Be it further resolved that the total unappropriated fund balance and total revenues to be available for appropriations in the General Fund of Portage Public Schools for the fiscal year 2021/22 is as follows:

	<b>Actual 2020/21</b>	<b>Amended Budget #1 2021/22</b>	<b>Amended Budget #2 2021/22</b>
Total Fund Balance, Beginning of Year, July 1	10,475,284	13,984,450	13,984,450
<b>REVENUES:</b>			
Local Sources	24,934,008	27,261,439	27,607,942
State Sources	71,472,476	76,051,146	76,667,481
Federal Sources	5,097,860	3,149,027	4,788,946
Incoming Transfers and Other Transactions	162,272	177,500	165,414
Total Revenues and Other Transactions	101,666,616	106,639,112	109,229,783
Total Available to Appropriate	112,141,900	120,623,562	123,214,233

Be it further resolved that \$109,716,003 of the total available to appropriate is hereby appropriated in the amounts and for the purposes set forth as follows:

<b>EXPENDITURES:</b>			
<b>Instruction:</b>			
Basic Programs	52,035,132	56,518,923	56,440,086
Added Needs	7,890,315	9,377,697	9,387,556
Total Instruction	59,925,447	65,896,620	65,827,642
<b>Supporting Services:</b>			
Pupil	7,002,420	8,015,490	8,340,038
Instructional Staff	5,199,762	5,798,791	6,036,057
General Administration	694,833	746,744	788,754
School Administration	5,618,638	5,991,229	6,028,704
Business Services	963,348	1,133,255	1,192,865
Operations and Maintenance	9,672,199	9,433,131	9,478,436
Transportation	2,608,198	3,484,731	3,834,027
Central Services	3,247,134	3,101,641	3,052,785
Athletics	1,553,244	2,031,466	1,948,045
Total Supporting Services	36,559,776	39,736,478	40,699,711
Community Services	1,582,310	1,756,796	2,978,992
Other Financing Use - Debt Service	89,917	89,917	209,658
Total Expenditure Appropriation	98,157,450	107,479,811	109,716,003
Excess (Deficit) of Revenues over Expenditures	3,509,166	(840,699)	(486,220)
Total Fund Balance (Assigned and Unassigned), End of Year, June 30 (Estimate)	\$ 13,984,450	\$ 13,143,751	\$ 13,498,230

**PORTAGE PUBLIC SCHOOLS  
GENERAL FUND BUDGET APPROPRIATIONS RESOLUTION  
2021/22 AMENDED BUDGET #2**

Be it further resolved that no board of Education member or employee of the School District shall expend any funds or obligate the expenditure of funds except pursuant to appropriations made by the Board of Education and in keeping with the budgetary policy statement previously adopted. Changes in the amount appropriated shall require approval by the Board of Education.

Be it further resolved that the Superintendent is hereby charged with general supervision of the execution of the budget as adopted by the Board of Education and shall hold the directors and department heads responsible for performance of their responsibilities within the amounts appropriated.

**PORTAGE PUBLIC SCHOOLS**  
**2021/22 AMENDED GENERAL FUND BUDGET**  
**COMPARISON BY MAJOR CATEGORIES AND FUND BALANCE INFORMATION**

	<u>Actual 2020/21</u>	<u>Amended Budget #1 2021/22</u>	<u>Amended Budget #2 2021/22</u>	<u>Increase (Decrease)</u>
<b>Revenues</b>				
Not Program Related	85,330,184	90,586,371	91,276,177	689,806
Program Related	16,336,434	16,052,741	17,953,606	1,900,865
Total Revenues	<u>101,666,618</u>	<u>106,639,112</u>	<u>109,229,783</u>	<u>2,590,671</u>
<b>Expenditures</b>				
Salaries	47,804,424	51,672,003	52,150,957	478,954
Fringe Benefits:				
FICA **	3,414,998	3,912,578	3,997,171	84,593
Retirement **	20,513,756	22,391,392	22,575,712	184,320
Health Insurance	8,177,349	8,869,582	8,661,751	(207,831)
Dental Insurance	572,147	642,041	678,216	36,175
Vision Insurance	148,932	153,172	153,895	723
Long-Term Disability	163,308	165,418	171,196	5,778
Life Insurance	39,266	44,369	44,496	127
Other Fringe Benefits	656,137	655,119	614,910	(40,209)
Total Fringe Benefits	<u>33,685,893</u>	<u>36,833,671</u>	<u>36,897,347</u>	<u>63,676</u>
(Note: ** Mandated fringe benefit)				
Purchased Services	10,276,346	12,159,334	13,674,452	1,515,118
Supplies, Materials, Other	5,449,779	6,237,300	6,290,520	53,220
Capital Outlay	854,203	490,694	494,623	3,929
Debt Service	86,809	86,809	208,104	121,295
Total Expenditures	<u>98,157,454</u>	<u>107,479,811</u>	<u>109,716,003</u>	<u>2,236,192</u>
Excess (Deficit) of Revenues over Expenditures	<u>\$ 3,509,164</u>	<u>\$ (840,699)</u>	<u>\$ (486,220)</u>	<u>\$ 354,479</u>
<b>Total Fund Balance Information</b>				
Fund Balance Beginning	10,475,284	13,984,450	13,984,450	
Income (Deficit) - Allocated to Unreserved	3,509,164	(840,699)	(486,220)	
Estimated Ending Fund Balance	13,984,448	13,143,751	13,498,230	
Estimated Non-Spendable and Assigned Fund Balance Restrictions	1,008,968	750,000	750,000	
Estimated Ending Unassigned Fund Balance	<u>\$ 12,975,480</u>	<u>\$ 12,393,751</u>	<u>\$ 12,748,230</u>	
As a Percentage of Expenditures	13.22%	11.53%	11.62%	

**PORTAGE PUBLIC SCHOOLS  
GENERAL FUND AMENDMENT #2  
PROGRAM LEVEL SUPPORTING DETAIL**

	<u>Amended Budget #1 2021/22</u>	<u>Amendments/ Transfers</u>	<u>Amended Budget #2 2021/22</u>
<b>REVENUES:</b>			
From Local Sources:			
Property Tax Levy (17.5695 mills)	15,224,371	(84,640)	15,139,731
Regional Enhancement Millage (1.5 mills)	3,415,000	130,220	3,545,220
Earnings from Investments and Deposits	1,075	(75)	1,000
Interest on Delinquent Taxes	14,548	(1,307)	13,241
Reimbursements from Other Funds:			
Accounting Services and Indirect Costs	170,000	(30,000)	140,000
Other Local Sources	68,591	64,238	132,829
From State Sources:			
Foundation Grant Allowance	59,780,585	91,748	59,872,333
Other State Categoricals/Foundation Adjustments	9,863,608	816,140	10,679,748
From Federal Sources:			
Medicaid Administrative Outreach Program	41,932	(27,000)	14,932
Program Related Revenues:			
Great Start Readiness Program	1,750	21,948	23,698
Contributions for Instructional Programs	58,037	12,728	70,765
Pay to Participate Fees	0	0	0
Online Class and IB/AP Test Fees	128,231	(28,695)	99,536
Athletic Gate Receipts and Contributions	185,864	106,045	291,909
Enrichment Class and Advertising Fees	1,500	5,772	7,272
Childcare and Preschool Fees	1,781,356	91,865	1,873,221
Technology Services	185,000	41,948	226,948
County Special Education and State Categoricals	8,244,643	(412,726)	7,831,917
At Risk Grant	1,662,850	137,326	1,800,176
Title 1 Grant	756,872	81	756,953
Title 2 Grant	290,434	19,193	309,627
Other Grants	490,002	72,418	562,420
Maintenance and Operations Facility Rental Fees	20,000	(6,000)	14,000
Transportation Special Education Categoricals and Billings	807,927	(2,000)	805,927
Childcare Stabilization Grant	0	1,032,602	1,032,602
Coronavirus Relief Funds	189,825	0	189,825
Elementary & Secondary School Emergency Relief Funds (ESSER)	3,255,110	538,843	3,793,953
<b>TOTAL REVENUES</b>	<u>\$ 106,639,111</u>	<u>\$ 1,019,227</u>	<u>\$ 109,229,783</u>

**PORTAGE PUBLIC SCHOOLS  
GENERAL FUND AMENDMENT #2  
PROGRAM LEVEL SUPPORTING DETAIL**

	<u>Amended Budget #1 2021/22</u>	<u>Amendments/ Transfers</u>	<u>Amended Budget #2 2021/22</u>
<b>EXPENDITURES:</b>			
<b>Instructional Services</b>			
Amberly Elementary	4,111,099	31,060	4,142,159
Angling Road Elementary	3,061,395	(68,911)	2,992,484
Central Elementary	3,329,712	(49,529)	3,280,183
Haverhill Elementary	3,483,286	(488,672)	2,994,614
Lake Center Elementary	4,245,093	32,546	4,277,639
Moorsbridge Elementary	4,156,276	44,661	4,200,937
12th Street Elementary	4,434,957	144,193	4,579,150
Woodland Elementary	3,610,701	50,236	3,660,937
Central Middle	5,111,709	32,142	5,143,851
North Middle	4,358,617	44,067	4,402,684
West Middle	4,947,582	35,715	4,983,297
Central High	10,700,412	305	10,700,717
Northern High	9,542,465	(232,547)	9,309,918
Auditorium Management	161,964	35,364	197,328
Childcare and Preschool Program	1,781,467	199,304	1,980,771
Childcare Stabilization Grant	0	1,032,602	1,032,602
Community High School Program	1,725,694	8,044	1,733,738
Coronavirus Relief Funds	189,825	0	189,825
Education for Employment	1,074,755	(176,662)	898,093
Education for the Arts	86,943	0	86,943
Elementary & Secondary School Emergency Relief Funds (ESSER)	3,255,110	538,843	3,793,953
High School Athletics	1,746,841	1,090	1,747,931
Homebound Services	12,555	9,324	21,879
Instructional Services Administration	1,116,549	15,195	1,131,744
Middle School Athletics	292,149	(2,197)	289,952
Non-Public Schools- Shared Time Program	686,670	(7,245)	679,425
<b>Technology and Student Information Systems</b>			
Media Services	227,406	14,553	241,959
Technology Services	3,027,602	(40,198)	2,987,404
<b>Special Education Services</b>			
Special Education Program	10,648,527	158,935	10,807,462
At Risk Grant	1,662,850	137,326	1,800,176
Title 1 Grant	756,872	18,117	774,989
Title 2 Grant	290,434	19,193	309,627
<b>Curriculum and Professional Development</b>			
Curriculum Development	1,161,813	27,245	1,189,058
Professional Development	212,935	79,702	292,637
Other Grants	578,154	233,917	812,071
<b>Operations</b>			
Budget and Finance	1,484,251	(118,296)	1,365,955
Central Services	110,756	(7,363)	103,393
Maintenance and Operations	5,056,710	157,872	5,214,582
Transportation	3,204,112	315,294	3,519,406
<b>Community Relations</b>			
Communications	325,548	(2,243)	323,305
Community Enrichment Program	106,778	1,199	107,977
<b>Human Resources</b>			
Administration	691,493	(29,690)	661,803
	709,744	41,701	751,445
<b>TOTAL EXPENDITURES</b>	<u>\$ 107,479,811</u>	<u>\$ 2,236,192</u>	<u>\$ 109,716,003</u>
<b>EXCESS (DEFICIT) REVENUES OVER EXPENDITURES</b>	<u>101</u> <u>\$ (840,700)</u>	<u>\$ (1,216,965)</u>	<u>\$ (486,220)</u>

June 13, 2022



**TO** : Mark Bielang, Superintendent

**FROM** : Paula Johnson, Director of Finance

**CC** : Johnny Edwards, Assistant Superintendent of Operations

**DATE** : June 8, 2022

**SUBJ** : Building and Site Sinking Fund Budget Amendment #1 Resolution for 21/22

### **RECOMMENDATION**

That the Board of Education adopt the attached resolution, Amendment #1 to the Building Site and Sinking Fund Appropriations Act, for the 2021/22 fiscal year.

### **BACKGROUND INFORMATION**

This recommendation represents the first amendment to the Building and Site Sinking Fund during the current fiscal year. Minor revenue adjustments have been made to reflect expected actuals for this year.

Minor expenditure adjustments were made in the ongoing project areas since the adoption of the preliminary budget. Projects such as new outdoor signage for Central High and Northern High were completed. Funds were also used for improvements at Central High School for fence work replacement at baseball field and for air handlers for heating and cooling of the kitchen, woodshop, cafeteria and gym spaces. Other routine ongoing projects such as playground upgrades and roof leak repairs were also conducted. Projects continue to be analyzed in conjunction with the bond issue projects. The BSSF budget would end the year with approximately \$6,243,170 of fund balance.

**PORTAGE PUBLIC SCHOOLS  
BUILDING AND SITE SINKING FUND BUDGET APPROPRIATIONS RESOLUTION  
2021/22 AMENDED BUDGET #1**

Be it resolved that this resolution shall be the Building and Site Sinking Fund appropriations of Portage Public Schools for the fiscal year 2021/22. A resolution to make appropriations; to provide for the expenditures of appropriations; and to provide for the disposition of all revenue received by Portage Public Schools.

Be it further resolved that the total unappropriated fund balance and total revenues to be available for appropriations in the Building and Site Sinking Fund of Portage Public Schools for the fiscal year 2021/22 is as follows:

	<b>Actual 2020/21</b>	<b>Adopted Budget 2021/22</b>	<b>Amendment #1 2021/22</b>
Total Fund Balance, Beginning of Year, July 1	4,371,445	4,740,405	5,104,086
<b>REVENUES:</b>			
Tax Levy at .4988 mills for all years	1,229,679	1,263,499	1,256,409
Payment in Lieu of Personal Property Tax from State Sources	116,689	86,500	127,377
Industrial Facilities Tax	34,086	30,000	17,359
Interest Income	1,324	1,000	600
Interest on Delinquent Taxes	1,095	300	445
Payment in Lieu of Taxes	2,579	1,500	2,596
Collection of Prior Year Taxes	2,807	400	855
Total Revenues and Other Transactions	1,388,259	1,383,199	1,405,641
Total Available to Appropriate	5,759,704	6,123,604	6,509,727

\*In compliance with Section 16 of the Uniform Budgeting and Accounting Act, this includes a tax levy of .4988 mills on all property classifications.

Be it further resolved that \$266,557 of the total available to appropriate is hereby appropriated in the amounts and for the purposes set forth as follows:

**EXPENDITURES:**

**Major Projects:**

Asphalt Projects:			
CEL Parking Lot	181,382	-	-
Administration North Parking Lot	71,500	-	-
Gym Floor Refinishing	-	-	12,492
Tennis Court Repairs (WMS/NHS/CHS)			
NHS Shop Lighting Project			
CHS Auditorium Handrail Replacement	-	25,000	-
CHS Baseball Field Renovation	25,082	-	16,480
CHS Outside Signage	-	-	29,460
NHS Lighting Project	16,539	-	-
NHS Outside Signage	-	-	29,580
CEL Canopy	-	75,000	-
MBE Playground	127,991	65,000	-
PCEC Playground	-	50,000	-
PCEC Classroom Renovation	9,246	10,000	3,469
WMS Locker Room Renovation	25,127	-	-
NHS Community Room Audio Visual Project	-	20,000	-
Total Major Projects	456,867	245,000	91,481

	<b>Actual 2020/21</b>	<b>Adopted Budget 2021/22</b>	<b>Amendment #1 2021/22</b>
Ongoing Projects			
Roof Repair	9,214	35,000	16,320
Glass	5,788	10,500	10,091
Fencing	17,882	20,500	8,990
Sidewalk Concrete Repair	2,219	31,500	3,000
Casework	1,781	10,500	1,959
Asbestos Abatement	5,950	21,000	10,000
Asphalt Repair	-	31,500	3,350
Toilet Partition Replacement	-	20,000	-
Carpet Replacement	-	125,000	1,468
District Mechanical	79,294	85,000	105,000
District Electrical	21,411	36,750	10,000
<b>Total On-Going Projects</b>	<b>143,539</b>	<b>427,250</b>	<b>170,178</b>
Exterior Door Replacement			
Various Exterior Doors At All Buildings	19,364	60,000	-
Other Projects			
Grounds replacement-playgrounds	6,301	35,000	803
Drinking Fountains	23,071	30,000	-
<b>Total Other Projects</b>	<b>29,372</b>	<b>65,000</b>	<b>803</b>
Tax refunds	6,476	6,000	4,095
Election Expense	-	-	-
<b>Total Expenditures</b>	<b>655,618</b>	<b>803,250</b>	<b>266,557</b>
Excess (Deficit) of Revenues over Expenditures	732,641	579,949	1,139,084
Total Fund Balance (Assigned and Unassigned), End of Year, June 30 (Estimate)	<u><u>\$5,104,086</u></u>	<u><u>\$5,320,354</u></u>	<u><u>\$6,243,170</u></u>

Be it further resolved that no Board of Education member or employee of the School District shall expend any funds or obligate the expenditure of funds except pursuant to appropriations made by the Board of Education and in keeping with the budgetary policy statement previously adopted. Changes in the amount appropriated shall require approval by the Board of Education.

Be it further resolved that the Superintendent is hereby charged with general supervision of the execution of the budget as adopted by the Board of Education and shall hold the directors and department heads responsible for the performance of their responsibilities within the amounts appropriated.



**TO** : Mark Bielang, Superintendent  
**FROM** : Paula Johnson, Director of Finance  
**DATE** : June 8, 2022  
**SUBJECT** : Debt Retirement Fund Budget Amendment #1 Resolution for 21/22

**RECOMMENDATION**

That the Board of Education adopt the attached resolution, Amendment #1, to the Debt Retirement Fund Appropriations Act, for the 2021/22 fiscal year at the June 27, 2022 meeting.

**BACKGROUND INFORMATION**

This recommendation represents the first amendment to the Debt Retirement Fund during the current fiscal year. The major change incorporated in this amendment is to adjust for the impact of increased levels of the various types of tax collections.

The net impact of this amendment indicated ending the year with a projected excess of revenues over expenditures by approximately \$98,600. Our anticipated ending fund balance is expected to be \$4,345,252.

Please let me know if you have any questions regarding this amendment.

**PORTAGE PUBLIC SCHOOLS  
DEBT RETIREMENT BUDGET APPROPRIATIONS RESOLUTION  
2021/22 AMENDED BUDGET #1**

Be it resolved that this resolution shall be the Debt Retirement appropriations of Portage Public Schools for the fiscal year 2021/22. A resolution to make appropriations; to provide for the expenditures of appropriations; and to provide for the disposition of all revenue received by Portage Public Schools.

Be it further resolved that the total unappropriated fund balance and total revenues to be available for appropriations in the Debt Retirement Fund of Portage Public Schools for the fiscal year 2021/22 is as follows:

	<u>Actual 2020/21</u>	<u>Adopted Budget 2021/22</u>	<u>Amendment #1 2021/22</u>
Total Fund Balance, Beginning of Year, July 1	2,675,408	4,195,782	4,246,652
<b>REVENUES:</b>			
Local Property Taxes (6.85 mills for all years)	16,858,257	13,602,628	17,323,985
Payment in lieu of Personal Property Taxes-State Sources	1,236,906	536,770	1,353,448
Industrial Facilities Tax	466,979	0	471,953
Pilot payment in lieu of tax	35,415	1,200	35,653
Other Tax Revenues	38,409	28,000	16,761
Interest Income - Investments	1,687	1,680	971
Interest on Delinquent Taxes	14,980	6,000	9,182
	<u>18,652,633</u>	<u>14,176,278</u>	<u>19,211,953</u>
Total Revenues and Other Transactions			
Total Available to Appropriate	<u>21,328,041</u>	<u>18,372,060</u>	<u>23,458,605</u>

\*In compliance with Section 16 of the Uniform Budgeting and Accounting Act, this includes a tax levy of 6.85 mills on all property classifications.

Be it further resolved that \$19,113,353 of the total available to appropriate is hereby appropriated in the amounts and for the purposes set forth as follows:

<b>EXPENDITURES:</b>			
Principal Payments	8,945,000	6,490,000	10,540,000
Interest Payments	8,075,544	7,726,518	8,551,957
Fees	1,000	1,000	1,500
Tax Refunds	59,845	26,500	19,896
	<u>17,081,389</u>	<u>14,244,018</u>	<u>19,113,353</u>
Total Expenditures			
Excess (Deficit) of Revenues over Expenditures	<u>1,571,244</u>	<u>(67,740)</u>	<u>98,600</u>
Total Fund Balance (Assigned and Unassigned), End of Year, June 30 (Estimate)	<u>\$ 4,246,652</u>	<u>\$ 4,128,042</u>	<u>\$ 4,345,252</u>

Be it further resolved that no Board of Education member or employee of the School District shall expend any funds or obligate the expenditure of funds except pursuant to appropriations made by the Board of Education and in keeping with the budgetary policy statement previously adopted. Changes in the amount appropriated shall require approval by the Board of Education.

Be it further resolved that the Superintendent is hereby charged with general supervision of the execution of the budget as adopted by the Board of Education and shall hold the directors and department heads responsible for performance of their responsibilities within the amounts appropriated.



**TO** : Mark Bielang, Superintendent  
**FROM** : Paula Johnson, Director of Finance  
**DATE** : June 8, 2022  
**SUBJECT** : School Service Fund Budget Amendment #1 Resolution for 21/22

**RECOMMENDATION**

That the Board of Education adopt the attached resolution, Amendment #1, to the School Service Fund Appropriations Act, for the 2021/22 fiscal year at the June 27, 2022 meeting.

**BACKGROUND INFORMATION**

This recommendation represents the first amendment to the School Service Fund for the 2021/2022 year. The purpose of this amendment is to amend the food service, bookstore, and school activities funds to align with the expected results for the current 2021/22 year.

The Food Service portion of this budget is being amended to reflect information based on operations under Chartwells. The revenues have been adjusted based on the participation trends to date. The adopted budget expense categories were analyzed based on the current year expectations and adjusted accordingly. All changes to the Food Service projections were completed jointly by Chartwells staff and myself.

Overall the Food Service operation is now projected to have revenues exceeding expenditures of approximately \$1.2 million this school year. Fund balance is projected at approximately \$1,712,466. The Extended Summer Food Service Program provided thousands of free meals to our students during the school year. The General Fund does receive approximately \$140,000 a year in indirect costs annually from the Food Service Program. We will continue to monitor revenues and expenditures going forward to try and keep the bottom line positive.

The school activities portion of this budget was adjusted slightly to account for current year activity since the adoption of the preliminary budget.

The bookstore portion of this budget reflects the combined projected operations of the CHS and NHS school bookstores.

Please let me know if you have any questions regarding this amendment.

**PORTAGE PUBLIC SCHOOLS  
SCHOOL SERVICE FUND BUDGET APPROPRIATIONS RESOLUTION  
2021/22 AMENDED BUDGET #1**

Be it resolved that this resolution shall be the School Service Fund appropriations of Portage Public Schools for the fiscal year 2021/22. A resolution to make appropriations; to provide for the expenditures of appropriations; and to provide for the disposition of all revenue received by Portage Public Schools.

Be it further resolved that the total unappropriated fund balance and total revenues to be available for appropriations in the School Service Fund of Portage Public Schools for the fiscal year 2021/22 is as follows:

	Food Service		Bookstore		School Activities	
	Adopted 2021/22	Amendment #1 2021/22	Adopted 2021/22	Amendment #1 2021/22	Adopted 2021/22	Amendment #1 2021/22
Total Fund Balance, Beginning of Year, July 1	304,176	437,746	-	-	-	-
<b>REVENUES:</b>						
Local Sources	469,223	369,474	16,000	30,000	1,120,000	1,100,000
State Sources	215,417	435,624	-	-	-	-
Federal Sources	3,001,685	3,856,861	-	-	-	-
Total Revenues and Other Transactions	3,686,325	4,661,959	16,000	30,000	1,120,000	1,100,000
Total Available to Appropriate	3,990,501	5,099,705	16,000	30,000	1,120,000	1,100,000

Be it further resolved that \$3,387,239 of the Food Service total, \$22,000 of the Bookstore total and \$1,000,000 of the School Activities total available to appropriate is hereby appropriated in the amounts and for the purposes set forth as follows:

<b>EXPENDITURES:</b>						
Food Service	3,372,913	3,247,239	-	-	-	-
Bookstore	-	-	16,000	22,000	-	-
Student Activities	-	-	-	-	1,120,000	1,000,000
Outgoing Transfer to General Fund for Indirect Costs	175,000	140,000	-	-	-	-
Total Expenditures and Outgoing Transfers	3,547,912	3,387,239	16,000	22,000	1,120,000	1,000,000
Excess (Deficit) of Revenues over Expenditures	138,413	1,274,720	0	8,000	0	100,000
Total Fund Balance (Assigned and Unassigned), End of Year, June 30 (Estimate)	\$ 442,589	\$ 1,712,466	\$ -	\$ 8,000	\$ -	\$ 100,000

Be it further resolved that no Board of Education member or employee of the School District shall expend any funds or obligate the expenditure of funds except pursuant to the appropriations made by the Board of Education and in keeping with the budgetary policy statement previously adopted. Changes in the amount appropriated shall require approval by the Board of Education.

Be it further resolved that the Superintendent is hereby charged with general supervision of the execution of the budget as adopted by the Board of Education and shall hold the directors and department heads responsible for the performance of their responsibilities within the amounts appropriated.

**PORTAGE PUBLIC SCHOOLS  
BOARD OF EDUCATION – COMMITTEE OF THE WHOLE WORK SESSION  
PORTAGE CENTRAL HIGH SCHOOL, ROOM #1136  
JUNE 13, 2022, 6:30 P.M.**

**Note Page**

**X. Discussion Items**

2. 2022-23 Budget Planning (OP 6220)

**PORTAGE PUBLIC SCHOOLS  
BOARD OF EDUCATION – COMMITTEE OF THE WHOLE WORK SESSION  
PORTAGE CENTRAL HIGH SCHOOL, ROOM #1136  
JUNE 13, 2022, 6:30 P.M.**

**Note Page**

**X. Discussion Items**

4. Revision to BL 0151 – Organizational Meeting (BL 0131.1)

**To:** Board of Education  
**From:** Policy Committee  
**Date:** June 8, 2022  
**Subject:** Revision Bylaw 0151 – Organizational Meeting

Copy To: Mark Bielang

**RECOMMENDATION**

The Policy Committee recommends a revision to Bylaw 0151 – ORGANIZATIONAL MEETING to extend the annual meeting to organize from no later than the second Monday in January to no later than the last Monday in January to provide additional flexibility and to be consistent with current practice.

**BACKGROUND INFORMATION**

The Board has approved January 16, 2023 as the date of the next organizational meeting. The second Monday is January 9, 2023, which is the first day back to school following winter break.

Legal reference in the existing policy, M.C.L. 168.302, only specifies that the term of a school board member begins on January 1 and is silent on when the organizational meeting should occur.

Book	Policy Manual
Section	BOARD APPROVED UPDATES 6/27/22
Title	ORGANIZATIONAL MEETING
Code	po0151
Status	
Adopted	September 14, 2015
Last Revised	June 27, 2022

0151 - **ORGANIZATIONAL MEETING**

The Board of Education shall organize annually not earlier than January 1st and not later than the last-second Monday in January at a meeting held for that purpose. The meeting shall be called to order by the ranking officer of the preceding Board or the Superintendent who shall serve as presiding officer until the election of a President.

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Legal	M.C.L. 168.302
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**PORTAGE PUBLIC SCHOOLS  
BOARD OF EDUCATION – COMMITTEE OF THE WHOLE WORK SESSION  
PORTAGE CENTRAL HIGH SCHOOL, ROOM #1136  
JUNE 13, 2022, 6:30 P.M.**

**Note Page**

**X. Discussion Items**

5. Earth Science Core Resource Purchase (OP 6320)



**To:** Mark Bielang, Superintendent  
**From:** Mike Huber, Director of Curriculum  
**CC:** Paula Johnson, Director of Finance  
Colin Killmer, Secondary Science Team Leader  
Lesley Lankerd, Curriculum Admin Assistant  
**Date:** June 7, 2022  
**Re:** Earth Science Core Resource Purchase

### **RECOMMENDATION**

It is recommended that the Board of Education approve the purchase of the Science Dimensions Earth Science Textbook and Digital Resources from Houghton Mifflin Harcourt (HMH) Publishing Company of Boston, MA.

The purchase will provide a core earth science resource in support of our new year-long earth science course at the high school level. The resource will provide a solid foundation for the earth science capstone course.

The \$92,172.74 purchase represents classroom sets of texts for our three high schools, digital licenses for the next 8 years, teacher texts and licenses for the next 8 years, and professional development services to support the first year of implementation. The entirety of the expense is to be provided for from the 2022-2023 General Fund budget.

### **BACKGROUND**

This is the final resource request for Portage Public Schools' move to the updated Michigan science standards. The move of Earth Science to the 11th grade three years ago created a need to establish a year long earth science class for our class of 2024 students. Those students will be juniors this coming year.

To research texts, the earth science team (Daniall Poulsen - NHS, Terri Adriance - CoHS, Jason Badders - CHS, and Chris Prom - NHS) reviewed a number of potential texts over the past 18 months. They utilized alignment to our priority standards, program needs, and activities supported through both the digital and hands-on components of textbooks.

The team requested a pilot for the HMH text for the 2021-2022 school year. Throughout the second semester, the team has piloted units developed using the new materials in our current semester-long earth science course. The units and pilot elements were well received by our students and small teaching team.

This recommendation will support the launch of this course this fall and for the next 8 years.

I am happy to answer any questions that you may have concerning this purchase recommendation.



# Houghton Mifflin Harcourt

Proposal #008399442

Prepared For

## Portage Public School District

Attention:

Mike Huber

mhuber@portageps.org

For the Purchase of:

## HMH Science Dimensions Earth and Space Science ©2018 Subscription 8-Years

Prepared By

Michelle Irwin

michelle.irwin@hnhco.com

**Please submit this proposal with your purchase order.**

Purchase orders or duly executed service agreements for **Professional Services** purchased, must be submitted at least 30 days before the service event date.

For greater detail, the complete Terms of Purchases may be reviewed here:

<http://www.hnhco.com/common/terms-conditions>

Send **Check Payments** to:  
Houghton Mifflin Harcourt Publishing Company  
14046 Collections Center Drive  
Chicago, IL 60693

Attention:  
Mike Huber  
mhuber@portageps.org

HMH Confidential and Proprietary

Send **Orders** to:  
k12orders@hnhco.com  
FAX: 800-269-5232  
HMH Orders  
9400 Southpark Center Loop  
Orlando, FL 32819-8647

# Proposal for Portage Public School District

ISBN	Title	Price	Quantity	Value of All Material	Free Materials Quantity
<b><u>Earth Science</u></b>					
<b>Student Digital Licenses</b>					
1792642	9780358427315 Science Dimensions Earth Student License Digital 8 Year Includes: Digital Student Resources 8 Year Digital Grades 9-12 Implementation Success	\$128.00	590	\$75,520.00	
<b>Total for Student Digital Licenses</b>		<b>\$75,520.00</b>			
<b>Teacher Digital Licenses</b>					
1808456	9780358554547 2018 Science Dimensions Earth Teacher License Digital 8 Year Includes: Science Dimensions Earth Teacher Resources 8 Year Digital Access to Teacher's Corner	\$600.00			12
<b>Total for Teacher Digital Licenses</b>		<b>\$0.00</b>			
<b>Print Materials</b>					
<b>Student Materials</b>					
1648268	9780544861817 Science Dimensions Earth Student Edition With the purchase of the Student Digital Subscription, the Print Student Edition price has been reduced. Full Price \$103.35.	\$67.20	170	\$11,424.00	
<b>Teacher Materials</b>					
1649597	9780544873353 Science Dimensions Earth Teacher Edition	\$172.50	9	\$1,552.50	
<b>Total for Print Materials</b>		<b>\$12,976.50</b>			
<b>Total for Earth Science</b>		<b>\$88,496.50</b>			

### **Professional Services - Science Dimensions Earth Implementation Success Plan**

1693437	9781328852007 Getting Started: Introduction to Science Dimensions 2018 9-12 Live Online 2-Hour This session guides teachers through their program structure, essential resources, and implementation recommendations. Teachers will also explore Ed, HMH's teaching and learning platform, and our professional learning pathway in Teacher's Corner.  This initial session is the first step on the way to a successful first 30 days. Additional training and support will be provided via Teacher's Corner on Ed. There, teachers will access a guided learning pathway based on their grade level and implementation timeline. A recommended sequence of live sessions and on-demand interactive media and videos will help teachers plan, teach, and assess learning using their new HMH program.		1		
<b>Getting Started and/or Follow-Up Live Online</b>					
1770127	9780358265375 Science Dimensions Follow-Up Live Online 1-Hour Grades 9-12	\$400.00	4	\$1,600.00	
<b>Total for Getting Started and/or Follow-Up Live Online</b>		<b>\$1,600.00</b>			

Send **Check Payments** to:  
Houghton Mifflin Harcourt Publishing Company  
14046 Collections Center Drive  
Chicago, IL 60693

Attention:  
Mike Huber  
mhuber@portageps.org

HMH Confidential and Proprietary

Send **Orders** to:  
k12orders@hnhco.com  
FAX: 800-269-5232  
HMH Orders  
9400 Southpark Center Loop  
Orlando, FL 32819-8647

**Proposal for  
Portage Public School District**

ISBN	Title	Price	Quantity	Value of All Material	Free Materials Quantity
<b>Total for Professional Services - Science Dimensions Earth</b>		<b>\$1,600.00</b>			

<i>Total Savings:</i>	<b>\$7,200.00</b>
<i>Subtotal Purchase Amount:</i>	<b>\$90,096.50</b>
<i>Shipping &amp; Handling:</i>	<b>\$2,076.24</b>
<b>Total Cost of Proposal (PO Amount):</b>	<b>\$92,172.74</b>

**\*\*Please add proper sales tax to your order\*\***

Send **Check Payments** to:  
Houghton Mifflin Harcourt Publishing Company  
14046 Collections Center Drive  
Chicago, IL 60693

Attention:  
Mike Huber  
mhuber@portageps.org

**HMH Confidential and Proprietary**

Send **Orders** to:  
k12orders@hnhco.com  
FAX: 800-269-5232  
HMH Orders  
9400 Southpark Center Loop  
Orlando, FL 32819-8647

**Total Cost of Proposal (PO Amount): \$92,172.74**

Thank you for considering HMH as your partner. We are committed to providing an excellent experience and delivering ongoing, high-quality service to our customers. To meet these goals, we want to ensure you are aware of the below Terms of Purchase. These terms help us process your order quickly, efficiently, and accurately, ensuring successful delivery and implementation of our solutions.

- Please return this cost proposal with your signed purchase order that matches product, prices and shipping charges.
- Provide the exact address for *delivery* of print materials. The shipping address may be your district warehouse or individual school sites, but it is essential that this is accurate.
- Please supply the name of each important district point of contact for all aspects of the solution including their direct contact information (email/phone):
  - o Point of Contact for Print materials
  - o Point of Contact for Digital materials
  - o Point of Contact for Scheduling Professional Development
- Please confirm that we have the correct 'Ship to' and 'Sold to' information on the cost proposal.
 

<b>Ship to:</b> Portage Public School District 8107 Mustang Dr Portage, MI 49002-5577	<b>Sold to:</b> Portage Public School District 8107 Mustang Dr Portage, MI 49002-5577
--	--
- Please provide funding start and end dates.
- Please note that all products and services will be billed upon the processing of your purchase order.
- Our payment terms are 30 days from the invoice date.
- Print subscription material quantities may be adjusted across grades for like products, to accommodate enrollment fluctuations, quantities cannot be adjusted between different programs or copyrights.
- Our shipping terms are FOB shipping point. The shipping term for your proposal is Shipping Point.
- Should any of these Terms of Sale conflict with any preprinted terms on your purchase order, the HMH terms of service shall apply.

Thank you in advance for supplying us with the necessary information at time of purchase.

Our goal is to ensure your success throughout the duration of this agreement, which starts with a highly successful delivery of our solution.

For greater detail, the complete Terms of Purchase may be reviewed here: <http://www.hmhco.com/common/terms-conditions>

**Date of Proposal: 5/24/2022**
**Proposal Expiration Date: 7/8/2022**


# Houghton Mifflin Harcourt

Send **Check Payments** to:  
 Houghton Mifflin Harcourt Publishing Company  
 14046 Collections Center Drive  
 Chicago, IL 60693

Attention:  
 Mike Huber  
 mhuber@portageps.org

**HMH Confidential and Proprietary**

Send **Orders** to:  
 k12orders@hnhco.com  
 FAX: 800-269-5232  
 HMH Orders  
 9400 Southpark Center Loop  
 Orlando, FL 32819-8647

**PORTAGE PUBLIC SCHOOLS  
BOARD OF EDUCATION – COMMITTEE OF THE WHOLE WORK SESSION  
PORTAGE CENTRAL HIGH SCHOOL, ROOM #1136  
JUNE 13, 2022, 6:30 P.M.**

**Note Page**

**X. Discussion Items**

6. Capital Outlay Furniture Purchase (OP 6320)



To: Mark Bielang, Superintendent  
From: Johnny Edwards, Assistant Superintendent of Operations  
CC: Paula Johnson, Director of Finance  
Date: June 13, 2022  
Re: Recommendation for Annual Student Furniture Purchase

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**RECOMMENDATION**

I am recommending the Board of Education approve the purchase of furniture from the distributors below. A total purchase cost of \$73,772.21 will come from the 2022/23 General Fund Budget.

<b>Vendor</b>	<b>Item</b>	<b>Count</b>	<b>Total Cost</b>
Interior Environments	Student/Teacher Chairs and Desks	56 Desks 54 Chairs Flexible Seating	\$32,472.21
Custer Furniture	Administration Building Chairs	150 Chairs	\$39,300.00
<b>Totals</b>			<b>\$73,772.21</b>

**BACKGROUND INFORMATION**

As part of our annual capital outlay budget process, the schools prioritized their furniture needs. Two elementary schools requested desk and chair replacements as one of their priority needs.

The Administration Building chairs were also identified as a priority need. The existing chairs were purchased in 2011 and there is wear and tear outside of the manufacturer warranty. We are unable to adequately repair the existing chairs. The new chairs include a 12-year warranty.

For your reference, we have also included the bid tab. In bold, you will find additional items that are to be purchased that are below the Board threshold.

### **BIDDING PROCESS**

These items were competitively bid with six responses received. Interior Environments was not the lowest bidder for the student furniture; however, the bid response received was closest to the requested specifications. Awarding Interior Environments this bid would allow us to replace existing furniture in poor condition as well as utilize this furniture as pilot furniture for the 2021 Elementary Bond Project. Custer was the lowest bidder for the Administration Building chairs. By selecting Custer, we will be able to replace many broken chairs in the Administration building.

I would be happy to answer any questions you may have about this recommendation.

Portage Public Schools  
RFP #10704  
5/23/2022 @ 10:00:00 am

Vendor Name	Qty	BSN Sports LLC		Interior Environments LLC		Holland Desk & Chair		Lakeshore Learning		Zemlick		Custer	
<b>Address</b>		Farmers Branch, TX		Novi, MI		Grand Rapids, MI		Carson, CA		Kalamazoo, MI		Grand Rapids, MI	
<b>Contact Name</b>		Jonathan Anderson		Amy Murray		Tim Mears		Sung Kim		Luke Zemlick		Emily Heilig	
<b>Contact E Mail</b>		bsnbid@bsnsports.com		amurray@ieoffices.com		tim@hollanddesk.com		biddept@lakeshorelearning.com		Luke@zemlick.com		eheilig@custerinc.com	
<b>Familial</b>		Yes		Yes		Yes		Yes		Yes		Yes	
<b>Iran Econ Act</b>		Yes		Yes		Yes		Yes		Yes		Yes	
<b>Legal Status</b>		Yes		Yes		Yes		Yes		Yes		Yes	
<b>Bid Categories</b>		<b>Unit Cost</b>	<b>Total Cost</b>	<b>Unit Cost</b>	<b>Total Cost</b>	<b>Unit Cost</b>	<b>Total Cost</b>	<b>Unit Cost</b>	<b>Total Cost</b>	<b>Unit Cost</b>	<b>Total Cost</b>	<b>Unit Cost</b>	<b>Total Cost</b>
<b>Category A - Bookcases</b>	3.00	NB	NB	\$219.36	\$658.08	NB	NB	\$746.90	\$2,240.70	\$249.99	\$749.97	NB	NB
<b>Category B - Cafeteria Table</b>	1.00	NB	NB	\$3,941.01	\$3,941.01	NB	NB	NB	NB	NB	NB	\$2,980.00	2,980.00
<b>Category C - Flexible Seating</b>	10.00	NB	NB	NB	NB	NB	NB	\$109.89	\$1,098.90	NB	NB	NB	NB
<b>C1 - Student Chairs w/bookrack</b>	26.00	NB	NB	\$210.65	\$5,476.90	\$120.11	\$3,122.86	NB	NB	NB	NB	NB	NB
<b>C2 - Student Chairs w/caster</b>	26.00	NB	NB	\$133.75	\$3,477.50	\$107.64	\$2,798.64	\$207.90	\$5,405.40	NB	NB	NB	NB
<b>C3 - Teacher Chairs w/caster</b>	2.00	NB	NB	\$171.76	\$343.52	\$163.25	\$326.50	NB	NB	NB	NB	NB	NB
<b>C4 - Seating General ADM Chairs</b>	150.00	NB	NB	\$293.46	\$44,019.00	NB	NB	NB	NB	NB	NB	\$262.00	\$39,300.00
<b>Category D - Student Desks</b>	12.00	NB	NB	\$283.60	\$3,403.20	\$303.75	\$3,645.00	\$482.90	\$5,794.80	NB	NB	NB	NB
<i>D - Adjustable pins (Holland Desk &amp; Chair)</i>	12.00	N/A	N/A	N/A	N/A	\$37.15	\$445.80	N/A	N/A	N/A	N/A	N/A	N/A
<b>D1 - Student Desks w/caster</b>	12.00	NB	NB	\$310.08	\$3,720.96	\$315.30	\$3,783.60	\$482.90	\$5,794.80	NB	NB	NB	NB
<b>D1- Adjustable pins (Holland Desk &amp; Chair)</b>	12.00	N/A	N/A	N/A	N/A	\$37.15	\$445.80	N/A	N/A	N/A	N/A	N/A	N/A
<b>D2 - Student Desks w/book box</b>	7.00	NB	NB	\$383.72	\$2,686.04	\$331.48	\$2,320.36	\$482.90	\$3,380.30	NB	NB	NB	NB
<i>D2- Adjustable pins (Holland Desk &amp; Chair)</i>	7.00	N/A	N/A	N/A	N/A	\$37.15	\$260.05	N/A	N/A	N/A	N/A	N/A	N/A
<b>D3 - Student Desks w/book box &amp; casters</b>	7.00	NB	NB	\$383.72	\$2,686.04	\$331.48	\$2,320.36	\$482.90	\$3,380.30	NB	NB	NB	NB
<i>D3- Adjustable pins (Holland Desk &amp; Chair)</i>	7.00	N/A	N/A	N/A	N/A	\$37.15	\$260.05	N/A	N/A	N/A	N/A	N/A	N/A
<b>D4 - Student Desks w/tote tray &amp; rail</b>	7.00	NB	NB	\$342.18	\$2,395.26	\$350.55	\$2,453.85	\$482.90	\$3,380.30	NB	NB	NB	NB
<i>D4- Adjustable pins (Holland Desk &amp; Chair)</i>	7.00	N/A	N/A	N/A	N/A	\$37.15	\$260.05	N/A	N/A	N/A	N/A	N/A	N/A
<b>D5 - Student Desks w/tote tray &amp; rail &amp; casters</b>	7.00	NB	NB	\$347.02	\$2,429.14	\$362.10	\$2,534.70	\$482.90	\$3,380.30	NB	NB	NB	NB
<i>D5- Adjustable pins (Holland Desk &amp; Chair)</i>	7.00	N/A	N/A	N/A	N/A	\$37.15	\$260.05	N/A	N/A	N/A	N/A	N/A	N/A
<b>D6 - Student Desks Standing</b>	4.00	NB	NB	\$297.82	\$1,191.28	\$329.17	\$1,316.68	NB	NB	NB	NB	NB	NB
<i>D6- Adjustable pins (Holland Desk &amp; Chair)</i>	4.00	N/A	N/A	N/A	N/A	\$46.65	\$186.60	N/A	N/A	N/A	N/A	N/A	N/A
<b>Category E - Activity Table Kidney</b>	1.00	NB	NB	\$541.11	\$541.11	\$747.33	\$747.33	\$757.90	\$757.90	NB	NB	NB	NB
<b>E - Adjustable Pins (Holland Desk &amp; Chair)</b>	1.00	N/A	N/A	N/A	N/A	\$58.30	\$58.30	N/A	N/A	N/A	N/A	N/A	N/A
<b>E1 - Activity Table</b>	2.00	NB	NB	\$475.61	\$951.22	\$687.24	\$1,374.48	\$757.90	\$1,515.80	NB	NB	NB	NB
<b>E1- Adjustable pins (Holland Desk &amp; Chair)</b>	2.00	N/A	N/A	N/A	N/A	\$51.35	\$102.70	N/A	N/A	N/A	N/A	N/A	N/A
<b>Category F - Stools</b>	16.00	NB	NB	\$120.45	\$1,927.20	NB	NB	\$218.90	\$3,502.40	NB	NB	NB	NB
<b>Category G - Athletic Equipment</b>	8.00	\$512.09	\$4,096.72	NB	NB	NB	NB	NB	NB	NB	NB	NB	NB
<b>Category H - Display Case</b>	2.00	\$1,795.42	\$3,590.84	NB	NB	NB	NB	NB	NB	NB	NB	\$3,595.00	7,190.00
<b>Alternates Bid?</b>		YES		YES		YES		YES		NO		NO	
<b>SHIPPING/INSTALL CHARGES</b>			\$0.00		2584.76								
<b>TOTAL BID</b>			\$7,687.56		\$79,847.46		\$29,023.76		\$39,631.90		\$749.97		\$49,470.00
<b>DELIVERY TIME</b>													
<b>PROPOSED TOTAL SPEND</b>			\$4,096.72		\$34,472.21		\$0.00		\$1,098.90		\$0.00		\$45,875.00

NB = No Bid

Only 1 Display Case  
needed from this  
vendor due to width

**PORTAGE PUBLIC SCHOOLS  
BOARD OF EDUCATION – COMMITTEE OF THE WHOLE WORK SESSION  
PORTAGE CENTRAL HIGH SCHOOL, ROOM #1136  
JUNE 13, 2022, 6:30 P.M.**

**Note Page**

**X. Discussion Items**

7. Construction Manager Contract Approval (OP 6320)



To: Mark Bielang, Superintendent  
From: Johnny Edwards, Assistant Superintendent of Operations  
CC: Paula Johnson, Director of Finance  
Date: June 13, 2022  
Re: Construction Manager Contract Approval

---

### **RECOMMENDATION**

I recommended that the Board of Education approve the contract documents between Portage Public Schools, the Owner, and Owen-Ames-Kimball Co., the Construction Manager, on the 2021 Elementary Schools Bond Project, in an amount equivalent to 2.9% of the construction cost, the funds for which will come from the 2021 Bond Fund.

### **BACKGROUND INFORMATION**

At the December 13, 2021 board meeting, the Board approved the award of Construction Manager (CM) services to Owen-Ames-Kimball (O-A-K), and authorized the administration to negotiate contract terms and conditions under the guidance of the District's legal counsel. Since that time, we have worked with Thrun Law (legal counsel), Plante Moran (Owner's rep) and O-A-K to negotiate the terms and conditions of the Construction Manager as Agent agreement for the 2021 Elementary Schools bond program. Preliminary terms were solicited as part of the CM RFP process in November and December of 2021. A draft contract was included as part of the RFP process and proposing firms were required to identify any exceptions they wanted to discuss. We subsequently worked with legal counsel to agree to contract language and terms acceptable to all parties.

Some key aspects of the final agreement we are pleased to highlight:

1. All project management staff and preconstruction services will be covered under the CM overhead portion of the project fee, while securing a fixed monthly rate for field supervision staffing. Field supervision staffing rate escalation will be capped at 3% per year beginning in 2024.
2. We agreed to an overhead and profit fee of 2.90% of the cost of the work (inclusive of services noted in item #1 above), a reduction of 0.1% from the proposed fee, saving more than \$100,000 in program costs.

3. We agreed to General Liability Insurance costs of approximately \$150,000 less than proposed through clarification of coverages required. GLI insurance charges will be level across all bond projects.
4. The agreement is structured to cover the entire bond program; however, PPS retains the ability to exit the agreement at any point, should circumstances change or the needs of the District evolve.

As a reminder, several factors led to the committee's recommendation to select Owen-Ames-Kimball as Construction Manager, including:

- O-A-K is a firm that is principally focused on K-12 school construction, with the vast majority of their work in this market sector.
- O-A-K delivered the projects from the 2015 bond program in a highly collaborative way with PPS, and they return the majority of that team for this program, including all the principal leadership. Their knowledge of PPS culture, expectations, and standards has allowed them to hit the ground running on this program.
- O-A-K has worked extensively with the selected AE firm, TowerPinkster, for many years. Nearly half of their K-12 projects in the past decade have been performed with TowerPinkster.
- O-A-K has a strong understanding of working safely on district sites, with detailed site access control and logistics plans demonstrating their commitment to this important focus. Further, they bring several ideas and programs to engage PPS students in the projects to spur interest in the work and potential career pathways.
- O-A-K is headquartered in West Michigan, with a branch office in Kalamazoo, and has significant resources to support this program.

I would be happy to answer any questions you may have.