

C.O.O.R. ISD Board of Education Meeting

Wednesday, March 12, 2025 6:00 PM

C.O.O.R. ISD Central Office, 11051 N Cut Road, Roscommon, MI 48653

1. Call to order & Roll Call

2. Opening Ceremonies

- Pledge of Allegiance

- Mission Statement

C.O.O.R. ISD provides programs and services with our partners to support the current and emerging teaching and learning needs of our schools and communities.

3. Adopt the Agenda

4. Department Updates

-Career & Technical Education Department

-Early Childhood Department

-Instructional Services Department

-Special Education Department

-R.O.O.C., Inc.

-K12 ETA (Educational Technology Association)

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Educational Technology Association

Technology for Learning

March 2025 ETA Report

Any Questions Please contact Josh Hayes, jhayes@k12eta.org

Tickets (ETA Wide):

- Current Open: 320
- Created this month: 1230

Trainings Provided:

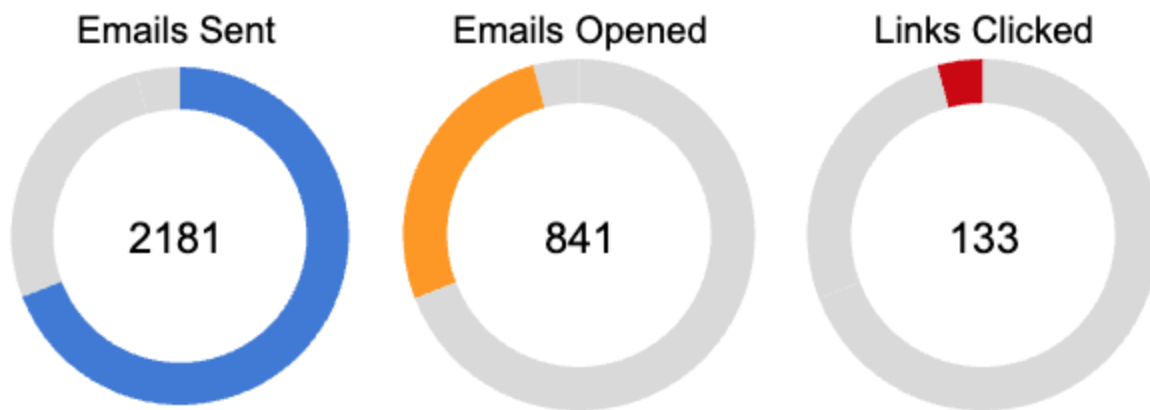
- Illuminate
- Google Classroom
- Artificial Intelligence
- 3D Printing
- Virtual Reality Tours
- PowerSchool
- Pupil Accounting

Updates:

- Erate bids and contracts are nearing completion for all supported districts with expiring Category 1 contracts. Through this process, we have successfully increased speeds at a reduced cost in certain locations and extended contracts in other districts. Furthermore, we are collaborating with districts to upgrade internal equipment and optimize the utilization of this funding source.
- We are continuing to collaborate with Clare Gladwin RESD to determine the most effective strategy to merge our two teams into a single, enhanced team. All staff members involved recognize the necessity and the potential presented by this grant. Additionally, the grant offers the opportunity for two other districts to either join or for the ETA to expand services. We are currently in discussions with two potential districts.
- ETA staff are preparing all devices for testing. This includes the testing servers and student devices.

Proudly Serving the districts within the COOR ISD, Manistee ISD, West Shore ESD, and Wexford-Missaukee ISD

- We continue attending cyber partner meetings (virtually) to stay informed of the newest threats. We then share this information with all the districts within the four ISD support regions of the ETA.
- Our external vulnerability scanner scanned 96 threats in 1053 locations this month. We have no open vulnerabilities at this time.
- All backups have been verified. Google backups were checked at COOR ISD, Manistee ISD, Wexford Missaukee ISD, and West Shore ESD. Veeam (server) backups have been checked for West Shore ESD, Crawford AuSable Schools, Mesick, Mason Country Central, COOR ISD, Manistee ISD, and Wexford Missaukee ISD
- Below are the latest statistics from our latest phishing test.





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Katie Keith,
 Supervisor of Early Childhood

Kurt Loll,
 Finance Director

Somer Quinlan,
 Director of ROOC, Inc.

Jared Socia,
 Director of Operations

To: Shawn Petri, Superintendent

From: Katie Harris

Date: February 2025

Subject: Instructional Services Update

Instructional Services

Director: Katie Harris

COOR Instructional Leadership Team Communication

The Instructional Leadership Team continued their work of developing a regional instructional system to guide teaching and learning by processing the work they have accomplished and determining next steps in the implementation process. Team members then used the 11.1 regional professional learning event feedback to brainstorm possible professional learning offerings for the 2025-2026 school year. The team wrapped up the meeting by revisiting their instructional priority practice and continuing their work with developing resources, tools, and materials for district's to utilize in the development of their instructional systems.

COOR Student Support Network Communication

31n Team

Behavioral Health Coordinator: Michelle Culton-Ekstrom

- Crystal Davis completed the TBRI practitioner training last week! We are excited to have our entire team fully trained.
- 31n team members continue to engage in providing mental health and coaching services in districts. Relationship building remains a priority and is occurring in a variety of ways. Our Mio Whole Child Specialist, Heather Sharpe, has become the sledding expert; building relationships, lifting moods, and teaching social skills through recess sledding events. Mio administration collaborated with their team, including Heather, to provide a field trip to the park for a sledding team building event! Heather and her bullhorn were at the top of the hill to lead the way. Way to go!
- We currently have two Whole Child Trauma Assessment appointments available before the end of the school year. We are utilizing Dr. Sloane and the 31n

team's assessment process for students with severe behavioral deficits and needs.

- 31n team members are in the process of becoming trained in Behavior Threat Assessment Management (BTAM). This will benefit each district by adding another trained mental health professional to their BTAM teams.
- This week is Social Emotional Learning week, here's a link for more information about the [fundamentals of SEL](#).

K-5 Literacy

K-5 Literacy Coach: Michelle Ewald

ISD-Wide Professional Learning

Episodes 1 (classroom lighting) and 2 (teaching with grade level text) of the "Literacy Quick Hitters" podcast have been shared with schools, with the next installment currently in development. The goal is to have the Episode 3 (topic - decodable texts) completed and distributed before spring break. So far there has been direct feedback and follow up requested from four different buildings across the ISD. Previous recordings are posted on the professional learning section of the COOR website to allow continued access as needed.

District-Level Support:

Ongoing support in each of these elementary buildings:

- **Charlton Heston Academy** - recently facilitated a Bookworms (ELA curriculum) Q&A session with the K-5 staff during early release professional development.
- **Fairview Elementary** - continuation of a coaching cycle of planning, modeling, and debriefing with a classroom teacher to analyze data and meet the needs of a small number of students who are struggling with foundational skills.
- **Houghton Lake/Collins Elementary** - planning with the instructional coach and principal for upcoming professional learning in order to facilitate implementation of the Bookworms curriculum in K-5 classrooms beginning in Fall 2025.
- **Mio Elementary** - monthly collaboration with teachers through grade level PLCs and K-5 staff meetings, in addition to ongoing dialogue with district administrators.
- **Roscommon Elementary** - consistent collaboration with the building-level coach to support instructional staff as they implement the Bookworms Enhanced Curriculum.

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Jared Socia,
Director of Operations

To: Shawn Petri, Superintendent

From: Melisa Akers, Director of Special Education

Date: March 6, 2025

Subject: Special Education Update

A Message from our Director, Melisa Akers

I am excited to share a [new video](#) that highlights our center-based program. This video will help the public gain a better understanding of the **C.O.O.R. Educational Center** and the vital support we provide to students with disabilities within our ISD. This video is not yet available for public viewing as we are finalizing media releases for the students. I will let you know when the video can be shared. I hope you enjoy watching it!

We are also looking forward to our upcoming **construction project**. In the next few months, I would love to share more details with you about the improvements we have planned. These much-needed renovations will significantly enhance the quality of services we provide to our students. I look forward to discussing this with you soon!

I would also like to **personally thank Dr. Mangutz** for the kind words he shared with Joe about our staff and their dedication to our students. Their work can sometimes feel unrecognized, and his thoughtful message serves as a meaningful reminder of their purpose and the important role they play in our organization.

A Message from our Special Education Technical Assistance, Nicole Grace

Over the past few weeks, professional learning has been a key focus. Thalma, Amber, and I successfully completed the [Paraeducator Bootcamp Train the Trainer](#) program. This statewide initiative aims to address the shortage of skilled paraeducators in Michigan. Through this program, we gained the tools, confidence, and knowledge needed to effectively train and support paraeducators.

The training includes both asynchronous online modules and in-person group sessions, aligned with the [Council for Exceptional Children \(CEC\)](#) Paraeducator Core Competencies and [START](#) best practices. This program equips paraeducators with the skills to assess their own competencies in relation to the CEC standards.

Typically priced at \$300 per participant, **Thalma, Amber, and I were able to attend at no cost**, thanks to a generous opportunity from the Michigan Association of Administrators of Special Education (MAASE) to enhance trainer capacity across the state. We are now excited to offer this training to paraprofessionals at the COOR Educational Center, as well as to districts within our region, during the 2025-2026 school year.

Additionally, Amber, Ayesha, and I recently led a training session for a diverse group of general education and special education staff on **Functional Behavior Assessments (FBA)** and **Behavior Intervention Plans (BIP)**. These are vital tools for supporting students with complex behavior needs. Participants left the session with valuable resources, enhanced knowledge, and ongoing support to implement these practices within their respective districts.

A Message from our Early On Coordinator, Michele Cochrane

Our **Build Up/Help Me Grow Pilot** is officially underway! Through this pilot, we can now receive Build Up referrals via an online database and share them with our local districts to start the evaluation process. Identifying and supporting children who are not yet in a preschool program can be challenging, increasing the risk of them falling through the cracks. We are excited to **partner with Help Me Grow** to streamline this process and provide families with additional support.

Help Me Grow connects families to valuable resources, including playgroups, home visiting programs, basic needs assistance, childcare support, and parenting guidance. The Help Me Grow navigator assigned to our ISD is working closely with our early childhood department to ensure they understand our birth-to-5 system and the many services available through the ISD and community agencies. Referrals to Help Me Grow can be initiated by anyone!

Help your child from birth through age 5 grow, develop and thrive!

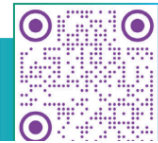
Connect with Help Me Grow today to find free or low-cost services for:

- Parental support
- Quality early learning/Preschool and child care
- Basic needs
- Health care
- Behavior referrals
- Home visiting
- Developmental screening
- Early intervention (Build Up Michigan and Early On Michigan)

We find the right resources, so you don't have to — saving your family time and hassle.



Scan here to get started at helpmegrow-mi.org/counties or call 844-464-0005.



A Message from our Monitor and Transition Coordinator, Brenda Vaughan-Ide

It's a busy time for monitoring and secondary transition!

In February, the state released data on several State Performance Plan (SPP) indicators. We're excited to share that all area districts and the ISD achieved **100% compliance** for **SPP Indicator B-11 (Child Find)** and **SPP Indicator B-12 (Transition from Part C Early Childhood to Part B for ages 3 and above)**! Additionally, most schools performed well on **Timely IEPs**, ensuring that IEP Team meetings are held on schedule and meet state expectations. These successes are a result of the hard work and dedication of staff at both the ISD and our local districts.

Currently, individual reviews are underway in **West Branch-Rose City** and **Mio AuSable** schools to examine discipline processes and procedures (**SPP Indicator B-4A/B**) for students with IEPs. **Secondary Transition (SPP Indicator B-13)** reviews are also in progress at all area secondary schools. Additionally, we are analyzing state input on assessments and providing training on updated processes for determining alternate state assessments across the ISD and local districts.

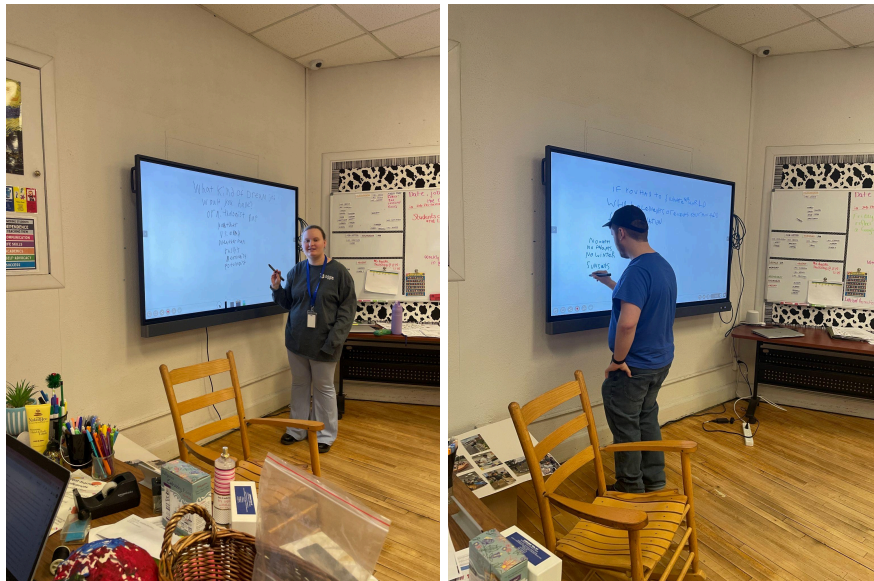
A Message from our Principal, Joe Moore

In February, our classrooms celebrated **Black History Month** by learning about influential African Americans and their contributions to our nation. Ms. Cheri's class created a fantastic bulletin board showcasing many of these remarkable individuals.

Their achievements have helped shape our country for the better, and we are grateful for the opportunity to honor their legacy.



Every day in Ms. Angie's ATC classroom, a student leads the class in a discussion based on a **focus question** of their choice. This activity helps **strengthen social skills and build confidence**. This month, students have sparked some fascinating conversations, including what they would create if they could design their own world and what their dream job would be.



March is **National Reading Month!** Classrooms will be celebrating their favorite books, and I'll be visiting to read some of their top picks. I always look forward to this time of year, as I love sharing stories with students and fostering their enthusiasm for reading.

R.O.O.C. Inc.

11018 North Cut Road, Roscommon, MI 48653

www.rooc.org

MEMORANDUM

To: Shawn Petri
From: Somer Quinlan
Re: ROOC Update
Date: March 6, 2025

February was dedicated to completing the annual review process, updating personnel files, and preparing for professional development. Below is an update on key activities and progress made during the month.

- **Staff Performance Appraisals:** Following the completion of staff performance appraisals in January, we reviewed the feedback received to make adjustments to our professional learning initiatives and make improvements to our daily programming. Staff feedback is essential to our ongoing commitment to employee development and maintaining high organizational standards.
- **Personnel File Review & Annual Professional Development:** In preparation for our CARF Accreditation survey and audit, we updated all personnel files and began planning our professional development agenda for the year. This includes incorporating new training requirements from the 2025 CARF manual updates to ensure compliance with accreditation standards.
- **Legislative and Policy Updates:** In the final week of March, we will attend two service provider meetings hosted by the Community Mental Health Authority and Incompass Michigan, where we will receive updates on relevant legislative and policy changes.
- **Building Construction:** Preparation for the first phase of building construction is underway. We have moved the workshop production area to create space for product storage, marking an important first step in the process.

February was a productive month, focused on staff development, compliance, and laying the groundwork for future growth. After our St. Patrick's Day celebration, we look forward to spring break and the return of warmer weather. We are excited to begin planning with our community partners for the community garden and MSU Extension activities this spring.



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Jared Socia,
Director of Operations

To: Shawn Petri, Superintendent

From: Michael Evans, CTE Director

Date: March 6, 2025

Subject: CATIC Update

Student Tours & Presentations

In an ongoing effort, CATIC staff and students have been actively hosting prospective students from local schools, offering them a firsthand look at the exciting opportunities available in Career and Technical Education (CTE). These tours have been well received and continue to generate significant interest in our programs across the ISD.

CATIC-Kirtland Partnership

CATIC continues to strengthen its partnership with Kirtland Community College to enhance student outcomes. In February, Mr. Evans met with Kirtland staff to discuss key aspects of this collaboration. The meeting focused on improving the efficiency and alignment of our EMC programs. Additionally, to help with the flow of information and local needs, KCC administrative staff has been invited to participate in future counselor and administrative forums.

Summer Camp Development

CATIC and the MISTEM Network are finalizing the details to bring another round of CTE and STEM related summer camps to the region in mid June! At CATIC, local middle school students will have the opportunity to participate in camps related to automotive, welding, forestry, robotics and culinary arts to name a few. To ensure all students have the opportunity to participate, we are working on details to provide transportation for our outlying districts.

Skills USA Cosmetology Competition

We are thrilled to congratulate our talented Cosmetology student for their incredible achievement at the Regionals Skills USA competition! With honor and pride, we celebrate their 3rd place finish in the Esthetics category, where they showcased their skill and creativity by performing three stunning makeup looks. This accomplishment is a testament to their hard work, dedication, and passion for the craft. We are so proud to see their talent recognized, and we can't wait to see where this journey takes them next! Keep shining bright! On to the State competition in April! (photos next page)





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To: Shawn Petri, Superintendent

From: Katie Keith, Early Childhood Supervisor

Date: March 2025

Subject: Early Childhood Update

Great Start to Quality

We partnered with COOR, AMA, and COP Great Start Collaboratives to host our annual virtual Early Childhood Conference on February 22nd. We had 66 participants register and 53 that attended. Susan Macdonald was the keynote speaker and focused on the topic of creating a culture of appreciation in your early childhood program. Other topics for the conference included: Accessing the Early On program, Inquiring minds- Science, Strategies for challenging behaviors, Love and Logic, Preparing for an onsite observation, Fostering a culture of belonging, make it and take it workshop, and MiAEYC- TEACH and CDA programs.

Shout out to our Quality Improvement coaches, Desiree Lipski, Melissa Maeder, Tracey Stein, and Kym Narayana for great feedback within their programs. Desiree, Kym, and Melissa have recruited the most child care providers in the state to sign up and complete nutrition and physical activity modules within the nutrition/physical activity educational training program (NAPSACC). There are 9 other Great Start to Quality Resource Centers in the state and our RC has been doing a great job of getting child care providers signed up for the online modules.

A group home child care provider shared this quote when she was talking about her experience in participating in the Infant Toddler Learning Community (ITLC, Tracey Stein's program), the Strengthening Families cohort (Desiree's program), and the LearnERS program (Kym and Desiree's programs), which is a series of modules and coaching to help child care providers prepare to have an onsite observation done on their program in order to achieve the top two levels of quality:

"Joining ITLC, Strengthening Families, and LearnERS Cohorts have been so helpful to me in learning new strategies to implement in my childcare. Collaborating and learning from the trainers and other providers have proven to be an excellent resource that hasn't taken me much time but has proven to be

beneficial to me and my business. If a busy mom involved in everything with kids of multiple ages can do it, anyone can!" -Carie Paull, Presque Isle County

Great Start Collaborative & Great Start Parent Coalition

Sharing the conference update the GSQ

Great Start Readiness Program

February 1 was the opening day of applications for GSRP enrollment for 2025-26. The amount of intakes are gradually increasing every day! We continue to tweak and update our enrollment protocols as MiLEAP continues to make requirement changes. With PreK for All, there are no longer over income students, but the families with the highest incomes have to be prioritized to be enrolled May 1 which is after we begin enrolling income eligible families April 1. All programs are reserving a percentage of spots for late enrollees until August 1.

We are responsible for maintaining a live dashboard for families to access our current enrollment status. Programs will begin updating the [dashboard](#) every two weeks until they are full or school starts.

5. Public Participation

- Any person attending the meeting may raise his/her hand during this session of the meeting. Individuals may speak for a maximum of 5 minutes. Groups may speak for a maximum of 15 minutes.

6. Consent Agenda

(A single member's request shall cause an item on the Consent Agenda to be relocated as an Action Item, eligible for discussion and vote that evening.)

A. Approve minutes of previous meeting on February 13, 2025

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Regular February Meeting Minutes

1. Call to order & Roll Call --

Dr. Mangutz brought the meeting to order at 6:00 PM. A regular meeting of the Board of Education (the “Board”) was held at 11051 N Cut Rd, Roscommon, MI, on Thursday, February 13, 2025 (rescheduled from Wednesday, February 12, 2025).

Attendance was taken at 6:01 PM. Present: Anthony Bair, Alyssa Faulkner, Ian Faulkner, Jim Gendernalik, James Mangutz, DDS. Absent: Kara Mularz and Nancy Persing. Superintendent Shawn Petri and Jane Petri were also in attendance. Department directors and presenters joined virtually.

2. Opening Ceremonies

- Pledge of Allegiance

- Mission Statement read by Dr. Mangutz

C.O.O.R. ISD provides programs and services with our partners to support the current and emerging teaching and learning needs of our schools and communities.

3. Adopt the Agenda

Adopt the agenda as presented. This motion, made by Ian Faulkner and seconded by Anthony Bair, Carried (5-0, 2 absent).

4. Presentations on Alternative Educational Academy of Ogemaw County –

Cindy Scott, Auditor at Stephenson & Company, P.C. presented the 2023-24 financial audit and Tina Williams presented on student enrollment and performance for 2023-24.

5. Discussion: The board discussed Board Committee membership for 2025.

6. *Approve the resolution authorizing the Issuance and Delegating the Sale of Bonds for the renovation of the COOR Educational Center for \$3,500,000.* This motion, made by Gendernalik, seconded by Faulkner, Carried. (5-0, 2 absent.) Faulkner- Yes, Bair – Yes, Alyssa – Yes, Dr. Mangutz – Yes, Gendernalik – Yes, Mularz - Absent, Persing- Absent.)

7. Department Updates - Board members read these in advance of the meeting.

- Career & Technical Education Department

- Early Childhood Department

- Instructional Services Department

- Special Education Department

- R.O.O.C., Inc.

- K12 ETA (Educational Technology Association)

8. Public Participation

- Any person attending the meeting may raise his/her hand during this session of the meeting. Individuals may speak for a maximum of 5 minutes. Groups may speak for a maximum of 15 minutes.

9. Consent Agenda

(A single member's request shall cause an item on the Consent Agenda to be relocated as an Action Item, eligible for discussion and vote that evening.)

Approve all items on the Consent Agenda. This motion, made by Ian Faulkner and seconded by Jim Gendernalik, Carried (5-0), 2 absent.

9.A. Approve minutes of previous meeting January 8, 2025

9.B. Approval of Bills for January 2025 totaling \$2,255,827.03

9.C. Approve Revenue & Expenditure Reports for January 2025

9.D. Approve a new 60-month lease with Image Makers for a newer Xerox Copier/Printer at the Adult Transition Center.

9.E. Ratify a contract with Charlton Heston Academy for GSRP services for the 2024-25 school year

9.F. Ratify the Subaward Agreement with the Early Childhood Investment Corporation for the fiscal year Oct 1, 2024 through Sept 30, 2025.

10. Action Items

10.A. *Approve the amended Career & Technical Education budget as presented by the Finance Director.* This motion, made by Jim Gendernalik and seconded by Anthony Bair, Carried (5-0), 2 absent.

10.B. *Adopt policy 4113, ESTA and remove Policy 4305, PMLA as presented by Thrun Law Firm and adopt Jan 29th updates from Thrun Law Firm: revisions to Policies 3115-3115H, 3118, 4101, 4102, 4104, 4105A, 5202, and 5206.* This motion, made by Ian Faulkner and seconded by Alyssa Faulkner, Carried (5-0), 2 absent.

10.C. *Approve Committee Member assignments for 2025 as discussed in item #5.* This motion, made by Ian Faulkner and seconded by Alyssa Faulkner, Carried (5-0), 2 absent.

Finance Committee

1. Jim Gendernalik
2. Kara Mularz
3. Nancy Persing

Policy Committee, Administrative Guidelines / Procedures

1. Nancy Persing
2. Dr. Mangutz
3. Alyssa Faulkner

Buildings and Grounds/ Equipment Committee

1. Ian Faulkner
2. Jim Gendernalik
3. Dr. Mangutz
(alternate: Anthony Bair)

Legislative/Strategic Planning Committee - as needed.

1. Kara Mularz
2. Anthony Bair
3. Ian Faulkner

Personnel Committee -

1. Anthony Bair
2. Jim Gendernalik
3. (Ian Faulkner, alternate)

Evaluation of the Superintendent - Committee of the Whole

11. Information Items
 - Social Media Reports: COOR ISD and COOR ATIC
 - Construction information for the Facilities Committee
12. Alternative Educational Academy of Ogemaw County Documents:
 - Jan 27, 2025 meeting agenda
 - Proposed charter contract 2025-2030 (first draft)
 - Jan 27, 2025 meeting minutes
 - Feb 10, 2025 meeting agenda
13. Superintendent's Report
 - There has been a request to make sure local schools observe Martin Luther King, Jr. Day.
 - The Optimist Club Special Communications Contest is underway at COOR Educational Center for the first year.
 - Title IX positions are being re-established according to new policy guidelines.
 - Proposed Mission, Vision, Beliefs, and Goals from the Strategic Planning Retreat were reviewed.
14. Communications
 - The Board received a thank-you letter from past member Lyn Sperry.
15. Public Comment (continued if needed)- None.
16. Adjournment: *Adjourn the meeting.* This motion, made by Jim Gendernalik and seconded by Alyssa Faulkner, carried (5-0). Time: 7:35 P.M.

Respectfully submitted,



Rebecca Socia, Recording Secretary



Ian Faulkner, Board Secretary

**C.O.O.R. INTERMEDIATE SCHOOL DISTRICT
RESOLUTION AUTHORIZING THE ISSUANCE
AND DELEGATING THE SALE OF BONDS
AND OTHER MATTERS RELATING THERETO**

C.O.O.R. Intermediate School District, Michigan (the "Issuer")

A regular meeting of the board of education of the Issuer (the "Board") was held in the COOR ISD Central Office, 11051 N. 47th Rd, within the boundaries of the Issuer, on the 13th day of February, 2025, at six o'clock in the p.m. (the "Meeting").

The Meeting was called to order by Dr. James Margutz, President.

Present: Members James Margutz, Jim Gendernalik,
Jan Faulkner, Anthony Bair, Alyssa Faulkner

Absent: Members
Nancy Persing, Kara Mularz

The following preamble and resolution were offered by Member Jim Gendernalik and supported by Member Jan Faulkner:

WHEREAS:

1. This Board deems it advisable and necessary to issue bonds for the purpose of completing, remodeling, improving, furnishing and refurbishing, and equipping and re-equipping a special education building and special education facilities; and preparing, developing, improving and equipping related playgrounds and sites (the "Project"); and Act 451, Public Acts of Michigan, 1976, as amended, authorizes this Board to issue bonds for the purpose of financing all or a portion of the Project; and

2. The Issuer estimates the necessary cost of the Project to be Three Million Four Hundred Fifty-Five Thousand Four Hundred Seventy-Five Dollars (\$3,455,475), of which it is necessary to borrow the sum of not to exceed Three Million Five Hundred Thousand Dollars (\$3,500,000), and issue bonds of the Issuer therefor to pay all or a portion of said cost including the cost of issuing the bonds; and

3. The Issuer may have the opportunity to directly or privately place the bonds with a sophisticated investor or commercial bank (the "Purchaser"); and

4. The Issuer has received a recommendation from PFM Financial Advisors LLC (the "Financial Advisor") regarding the private placement of the Bonds; and

5. Prior to the issuance of bonds, the Issuer must either achieve qualified status or secure prior approval of the Bonds from the Michigan Department of Treasury (the "Department") pursuant to Act 34, Public Acts of Michigan, 2001, as amended.

NOW, THEREFORE, BE IT RESOLVED THAT:

1. The Bonds of the Issuer aggregating the principal sum of not to exceed Three Million Five Hundred Thousand Dollars (\$3,500,000) be issued for paying the costs of Project

EXHIBIT A

[No.]
**UNITED STATES OF AMERICA
STATE OF MICHIGAN
C.O.O.R. INTERMEDIATE SCHOOL DISTRICT
2025 SCHOOL IMPROVEMENT BOND
(GENERAL OBLIGATION - LIMITED TAX)**

Rate Maturity Date Date of Original Issue CUSIP No.

REGISTERED OWNER:
PRINCIPAL AMOUNT:

C.O.O.R. INTERMEDIATE SCHOOL DISTRICT, STATE OF MICHIGAN (the "Issuer"), promises to pay to the Registered Owner specified above, or registered assigns, the Principal Amount specified above, in lawful money of the United States of America on the Maturity Date specified above, with interest thereon, from the Date of Original Issue until paid at the Rate specified above on the basis of a 360-day year, 30-day month, payable on October 1, 2025, and semiannually thereafter on the first day of April and October of each year (the "Bond" or "Bonds"). Principal on this Bond is payable at the corporate trust office of _____, MICHIGAN (the "Paying Agent"), upon presentation and surrender hereof. Interest is payable by check or draft mailed to the Registered Owner at the registered address shown on the registration books of the Issuer kept by the Paying Agent as of the close of business on the 15th day of the month preceding any interest payment date. The Issuer may hereafter designate a successor paying agent/bond registrar by notice mailed to the Registered Owner not less than sixty (60) days prior to any interest payment date.

This Bond is one of a series of bonds of like date and tenor, except as to denomination, rate of interest and date of maturity, aggregating the principal amount of Three Million Five Hundred Thousand Dollars (\$3,500,000) issued under and in pursuance of the provisions of Act 451, Public Acts of Michigan, 1976, as amended; Act 34, Public Acts of Michigan, 2001, as amended; and by resolutions duly adopted by the Board of Education of the Issuer on _____, 20__ and _____, 20__, for the purpose of authorizing issuance of the Bonds by the Issuer.

The series of Bonds of which this is one is issued for the purpose of completing, remodeling, improving, furnishing and refurbishing, and equipping and re-equipping a special education building and special education facilities; and preparing, developing, improving and equipping related playgrounds and sites.

The limited tax, full faith, credit and resources of the Issuer are hereby pledged for the payment of the principal and interest on the Bonds. The Bonds of this issue are payable primarily from ad valorem taxes, including those taxes levied for special education purposes that may be used for Bond purposes under applicable law, which will be levied within the authorized constitutional, statutory and charter tax rate limitations of the Issuer and an irrevocable appropriation of a sufficient amount of such taxes will be made each year as a first operating budget obligation for the payment of the principal of and interest on the Bonds as due, subordinate only

to any first liens on said funds pledged for the payment of state aid notes, lines of credit or tax anticipation notes heretofore or hereafter issued and, if taxes are insufficient to pay the Bonds when due, the Issuer has pledged to use any and all other resources available for the payment of the Bonds. The Issuer does not have the power to levy taxes for the payment of the Bonds in excess of its constitutional, statutory or charter tax rate limitations. The Issuer reserves the right to issue additional bonds of equal standing.

MANDATORY REDEMPTION

The Bonds maturing on _____, 20__, are term Bonds subject to mandatory redemption, in part, by lot, on the redemption dates and in the principal amounts set forth below and at a redemption price equal to the principal amount thereof, without premium, together with accrued interest thereon to the date fixed for redemption. When term Bonds are purchased by the Issuer and delivered to the Paying Agent for cancellation or are redeemed in a manner other than by mandatory redemption, the principal amount of the term Bonds affected shall be reduced by the principal amount of the Bonds so redeemed or purchased in the order determined by the Issuer.

<u>Redemption Dates</u>	<u>Bonds due</u>	<u>Principal Amounts</u>
_____, 20__		\$
_____, 20__		
_____, 20__		
_____, 20__ (maturity)		

NO OPTIONAL REDEMPTION

Bonds of this issue are not subject to redemption at the option of the Issuer prior to maturity.

Notice of redemption of any Bond shall be given not less than thirty (30) days and not more than sixty (60) days prior to the date fixed for redemption by mail to the Registered Owner at the registered address shown on the registration books kept by the Paying Agent. Bonds shall be called for redemption in multiples of \$5,000, and Bonds of denominations of more than \$5,000 shall be treated as representing the number of Bonds obtained by dividing the denomination of the Bond by \$5,000, and such Bonds may be redeemed in part, provided the unredeemed portion has a par value of not less than \$100,000. The notice of redemption for Bonds redeemed in part shall state that upon surrender of the Bond to be redeemed a new Bond or Bonds in an aggregate principal amount equal to the unredeemed portion of the Bond surrendered shall be issued to the Registered Owner thereof. No further interest payment on the Bonds or portions of Bonds called for redemption shall accrue after the date fixed for redemption, whether presented for redemption, provided funds are on hand with the Paying Agent to redeem the same.

If less than all of the Bonds of any maturity shall be called for redemption prior to maturity, unless otherwise provided, the particular Bonds or portions of Bonds to be redeemed shall be selected by the Paying Agent, in such manner as the Paying Agent in its discretion may deem proper, in the principal amounts designated by the Issuer. Upon presentation and surrender of such Bonds at the corporate trust office of the Paying Agent, such Bonds shall be paid and redeemed.

This Bond is registered as to principal and interest and is transferable, as provided in the resolutions authorizing the Bonds, only upon the books of the Issuer kept for that purpose by the





Paying Agent, by the Registered Owner hereof in person or by an agent of the Registered Owner duly authorized in writing, upon the surrender of this Bond together with a written instrument of transfer satisfactory to the Paying Agent duly executed by the Registered Owner or agent thereof and thereupon a new Bond or Bonds in the same aggregate principal amount and of the same maturity shall be issued to the transferee in exchange therefor as provided in the resolutions authorizing the Bonds, and upon payment of the charges, if any, therein provided. The Bonds are issuable in minimum denominations of \$100,000 and multiples of \$5,000 over \$100,000 not exceeding the aggregate principal amount for each maturity.

It is hereby certified and recited that all acts, conditions and things required to be done, to happen, and to be performed, precedent to and in the issuance of this Bond, have been done, have happened and have been performed in due time, form and manner, as required by law.

This Bond shall not be deemed a valid and binding obligation of the Issuer in the absence of authentication by manual execution hereof by the authorized signatory of the Paying Agent.

IN WITNESS WHEREOF, C.O.O.R. Intermediate School District, State of Michigan, by its Board of Education, has caused this Bond to be signed in the name of the Issuer by the manual or facsimile signature of its President and countersigned by the manual or facsimile signature of its Secretary as of _____, 2025, and to be manually signed by the authorized signatory of the Paying Agent as of the date set forth below.

C.O.O.R. INTERMEDIATE SCHOOL
DISTRICT
STATE OF MICHIGAN

Countersigned

By _____
Secretary

By _____
President

CERTIFICATE OF AUTHENTICATION

Dated:

This Bond is one of the Bonds described herein.

(Name of Bank)

(City, State)

PAYING AGENT

By _____
Authorized Signatory

ASSIGNMENT

FOR VALUE RECEIVED, the undersigned hereby sells, assigns and transfers unto _____
_____ the within Bond and does hereby irrevocably
constitute and appoint _____ attorney to transfer
the Bond on the books kept for registration of the within Bond, with full power of substitution in
the premises.

Dated: _____

NOTICE: The assignor's signature to this assignment
must correspond with the name as it appears upon the
face of the within Bond in every particular without
alteration or any change whatever.

Signature Guaranteed:

Signature(s) must be guaranteed by an eligible guarantor institution participating in a
Securities Transfer Association recognized signature guarantee program.

The Paying Agent will not effect transfer of this Bond unless the information concerning
the transferee requested below is provided.

Name and Address: _____

(Include information for all joint owners if the Bond is held by joint
account.)

**PLEASE INSERT SOCIAL SECURITY NUMBER OR
OTHER IDENTIFYING NUMBER OF ASSIGNEE**

(if held by joint account, insert number
for first named transferee)

purposes and the cost of issuing the bonds. The bonds shall be designated 2025 School Improvement Bonds (General Obligation – Limited Tax) (the “Bonds”).

2. The Bonds shall be dated the date of delivery, or such other date as established at the time of sale; shall be fully registered bonds as to principal and interest; shall be numbered consecutively in the direct order of maturity from 1 upwards; and shall bear interest at a rate or rates to be hereafter determined not exceeding the maximum rate of five and five tenths percent (5.5%) per annum.

3. The Bonds may consist of serial or term Bonds or any combination thereof which shall be determined upon sale of the Bonds. The Bonds are issuable in minimum denominations of \$100,000 and multiples of \$5,000 over \$100,000, not exceeding the aggregate principal amount for each maturity, and shall mature on April 1 in each year, in the final principal amounts determined upon sale, with interest thereon payable on October 1, 2025, or such other date as may be established at the time of sale, and semiannually thereafter on April 1 and October 1 in each year.

4. The Bonds shall otherwise be subject to redemption at the times, in the amounts, manner and at the prices as determined upon sale of the Bonds.

5. The Bonds and the interest thereon shall be payable in lawful money of the United States of America at or by a bank or trust company to be designated by the Superintendent or the Director of Finance of the Issuer (each an “Authorized Officer”) at the time of sale (herein called the “Paying Agent”), which shall act as the paying agent and bond registrar or such successor paying agent-bond registrar as may be approved by the Issuer, on each semiannual interest payment date and the date of each principal maturity.

6. Book Entry. At the request of the Purchaser, the ownership of one fully registered bond for each maturity in the aggregate principal amount of such maturity shall be registered in the name of Cede & Co., as nominee of The Depository Trust Company (“DTC”). So long as the Bonds are in the book entry form only, the Paying Agent shall comply with the terms of the Blanket Issuer Letter of Representations to be entered into between the Issuer and DTC, which provisions shall govern registration, notices and payment, among other things, and which provisions are incorporated herein with the same effect as if fully set forth herein. An Authorized Officer is authorized and directed to enter into the Blanket Issuer Letter of Representations with DTC in such form as determined by an Authorized Officer, in consultation with bond counsel, to be necessary and appropriate. In the event the Issuer determines that the continuation of the system of book entry only transfer through DTC (or a successor securities depository) is not in the best interest of the DTC participants, beneficial owners of the Bonds, or the Issuer, the Issuer will notify the Paying Agent, whereupon the Paying Agent will notify DTC of the availability through DTC of the bond certificates. In such event, the Issuer shall issue and the Paying Agent shall transfer and exchange Bonds as requested by DTC of like principal amount, series and maturity, in authorized denominations to the identifiable beneficial owners in replacement of the beneficial interest of such beneficial owners in the Bonds, as provided herein.

So long as the book-entry-only system remains in effect, in the event of a partial redemption the Paying Agent will give notice to Cede & Co., as nominee of DTC, only, and only Cede & Co. will be deemed to be a holder of the Bonds. DTC is expected to reduce the credit balances of the

applicable DTC Participants in respect of the Bonds and in turn the DTC Participants are expected to select those Beneficial Owners whose ownership interests are to be extinguished or reduced by such partial redemptions, each by such method as DTC or such DTC Participants, as the case may be, deems fair and appropriate in its sole discretion.

7. In the event the Bonds are not or are no longer in book entry form only, the following provisions would apply to the Bonds:

The Paying Agent shall keep or cause to be kept, at its principal office, sufficient books for the registration and transfer of the Bonds, which shall at all times during normal business hours be open to inspection by the Issuer; and, upon presentation and surrender for such purpose, the Paying Agent shall, under such reasonable regulations as it may prescribe, transfer or cause to be transferred on said books, Bonds as herein provided.

Any Bond may be transferred upon the books required to be kept pursuant to this section by the person in whose name it is registered, in person or by a duly authorized agent, upon surrender of the Bond for cancellation, accompanied by delivery of a duly executed written instrument of transfer in a form approved by the Paying Agent. Whenever any Bond or Bonds shall be surrendered for transfer, the Issuer shall furnish or cause to be furnished a sufficient number of manual or facsimile executed Bonds and the Paying Agent shall authenticate and deliver a new Bond or Bonds for like aggregate principal amount. The Paying Agent shall require the payment of any tax or other governmental charge required to be paid with respect to the transfer to be made by the bondholder requesting the transfer.

8. If any Bond shall become mutilated, the Issuer, at the expense of the holder of the Bonds, shall furnish or cause to be furnished, and the Paying Agent shall authenticate and deliver, a new Bond of like tenor in exchange and substitution of the mutilated Bond, upon surrender to the Paying Agent of the mutilated Bond. If any Bond issued under this resolution shall be lost, destroyed or stolen, evidence of the loss, destruction or theft and indemnity may be submitted to the Paying Agent, and if satisfactory to the Paying Agent and the Issuer, the Issuer at the expense of the owner, shall furnish or cause to be furnished, and the Paying Agent shall authenticate and deliver a new Bond of like tenor and bearing the statement required by Act 354, Public Acts of Michigan, 1972, as amended, being sections 129.131 to 129.134, inclusive, of the Michigan Compiled Laws, or any applicable law hereafter enacted, in lieu of and in substitution of the Bond so lost, destroyed or stolen. If any such Bond shall have matured or shall be about to mature, instead of issuing a substitute Bond, the Paying Agent may pay the same without surrender thereof.

9. The President and Secretary are authorized to provide the Bonds in conformity with the specifications of this resolution by causing their manual or facsimile signatures to be affixed thereto, and upon the manual execution by the authorized signatory of the Paying Agent, the Treasurer is authorized and directed to cause said Bonds to be delivered to the Purchaser upon receipt of the purchase price and accrued interest, if any.

Blank Bonds with the manual or facsimile signatures of the President and Secretary affixed thereto, shall, at the direction of bond counsel and as necessary, be delivered to the Paying Agent for safekeeping to be used for registration and transfer of ownership.

10. There is hereby created a separate depository account to be kept with a bank located in the State of Michigan and insured by the Federal Deposit Insurance Corporation, previously approved as an authorized depository of funds of the Issuer, to be designated 2025 SCHOOL BOND DEBT RETIREMENT FUND (the "DEBT RETIREMENT FUND"), all proceeds from taxes levied for the DEBT RETIREMENT FUND shall be deposited as collected into said fund to be used for the purpose of paying the principal and interest on the Bonds as they mature or are redeemed. Upon receipt of the Bond proceeds from the sale of the Bonds, the accrued interest, if any, shall be deposited in the DEBT RETIREMENT FUND. DEBT RETIREMENT FUND monies may be invested as authorized by law.

11. The Issuer irrevocably pledges to make the annual principal and interest payments on the Bonds beginning with the fiscal year 2025-2026 and during each fiscal year for which a budget is adopted, the first budget obligation within its authorized millage and other available funds until such time as the principal and interest on the Bonds have been paid in full.

12. Commencing with the 2025 tax levy, there shall be levied upon the tax rolls of the Issuer in each year for the purpose of the DEBT RETIREMENT FUND a sum not less than the amount estimated to be sufficient to pay the principal and interest on the Bonds as such principal and interest fall due, the probable delinquency in collections and funds on hand being taken into consideration in arriving at the estimate. The Issuer pledges its limited tax full faith and credit for the payment of the principal and interest on the Bonds, payable from ad valorem taxes including those taxes levied for special education purposes that may be used for Bond purposes under applicable law, which will be levied within the authorized constitutional, statutory, and charter tax rate limitations of the Issuer for such purposes and an irrevocable appropriation of a sufficient amount of taxes will be made each year from said millage rate for the payment of principal and interest on the Bonds as due, subordinate only to any first liens on said funds pledged for the payment of state aid notes, lines of credit or tax anticipation notes heretofore or hereafter issued. The Issuer reserves the right to issue additional bonds of equal standing.

Because the Issuer does not have the power to levy taxes for the payment of the Bonds in excess of its constitutional, statutory or charter tax rate limitations, the Bonds will be limited tax general obligations of the Issuer, and, if tax collections are insufficient to pay the principal of or interest on the Bonds when due, the Issuer pledges to use any and all other resources available for the payment of the Bonds.

13. There is hereby created a separate account to be designated 2025 CAPITAL PROJECTS FUND, to which the proceeds of the Bond issue are to be credited.

14. The Bonds shall be in substantially the form attached hereto as Exhibit A.

15. An Authorized Officer is authorized to pursue, negotiate and select a sophisticated investor or commercial bank for a private placement of the Bonds, subject to the requirements of paragraph 18 below. An Authorized Officer is authorized to execute any documents or agreements necessary to evidence or consummate the private placement in accordance with the provisions of this resolution. Based upon information provided by the Issuer's Financial Advisor, a negotiated sale allows flexibility in the timing, sale and structure of the Bonds in response to changing market conditions.

16. An Authorized Officer is authorized to approve circulation of a Preliminary Official Statement or Marketing Bulletin, as necessary, describing the Bonds.

17. An Authorized Officer, or designee if permitted by law, is authorized to:

- A. File with the Department an application for approval to issue the Bonds, if required, and to pay any applicable fee therefor and, further, within fifteen (15) business days after issuance of the Bonds, file any and all documentation required subsequent to the issuance of the Bonds, together with any statutorily required fee.
- B. Make application for municipal bond insurance if, upon advice of the Issuer's Financial Advisor, the purchase of municipal bond insurance will be cost effective. The premium for such bond insurance shall be paid by the Issuer from Bond proceeds.

18. The authorization to make a direct placement of the Bonds is subject to the following parameters:

- A. the true interest cost rate on the Bonds shall not exceed five and five tenths percent (5.5%) per annum;
- B. the term of the Bonds shall not exceed ten (10) years; and
- C. the receipt of express written recommendation of the Issuer's Financial Advisor identified herein to accept the terms of the bond purchase and/or placement agreement.

19. An Authorized Officer is further authorized and directed to (i) appoint a paying agent for the Bonds; (ii) select a bond insurer, accept a commitment therefor and authorize payment of a bond insurance premium to insure any or all of the Bonds if recommended in writing by the Issuer's Financial Advisor; (iii) if required, deem a Preliminary Official Statement for the Bonds final for purposes of SEC Rule 15c2-12(b)(1); and (iv) if required, execute and deliver a final Official Statement on behalf of the Issuer.

20. The President or Vice President, the Secretary, the Treasurer, the Superintendent, the Director of Finance, and/or all other officers, agents and representatives of the Issuer and each of them shall execute, issue and deliver any certificates, statements, warranties, representations, or documents necessary to effect the purposes of this resolution, the Bonds, or the bond purchase and/or placement agreement.

21. The officers, agents and employees of the Issuer are authorized to take all other actions necessary and convenient to facilitate the sale and delivery of the Bonds.

22. Thrun Law Firm, P.C., is appointed as bond counsel for the Issuer with reference to the issuance of the Bonds authorized by this resolution. Further, Thrun Law Firm, P.C., has informed this Board that it represents no other party in the issuance of the Bonds.

23. The financial consulting firm of PFM Financial Advisors LLC, is appointed as financial advisor to the Issuer with reference to the issuance of the Bonds herein authorized.

24. The Board covenants to comply with existing provisions of the Internal Revenue Code of 1986, as amended (the "Code"), necessary to maintain the exclusion of interest on the Bonds from gross income.

25. The Bonds of this issue are hereby designated as "qualified tax-exempt obligations" for purposes of deduction of interest expense by financial institutions under the provisions of the Code. In making said designation, the Board determines that the reasonably anticipated amount of tax-exempt obligations which will be issued by the Issuer or entities which issue obligations on behalf of the Issuer during calendar year 2025 will not exceed \$10,000,000, excluding only those tax-exempt obligations as permitted by Section 265(b)(3)(C)(ii) of the Code.

26. All resolutions and parts of resolutions insofar as they conflict with the provisions of this resolution are hereby rescinded.

Ayes: Members *Ian Faulkner, Anthony Bair, Alyssa Faulkner, Dr. James Mangutz, Jim Gendernalik.*

Nays: Members

Resolution declared adopted.



Secretary, Board of Education

The undersigned duly qualified and acting Secretary of the Board of Education of C.O.O.R. Intermediate School District, Michigan, hereby certifies that the foregoing constitutes a true and complete copy of a resolution adopted by the Board at the Meeting, the original of which is part of the Board's minutes. The undersigned further certifies that notice of the Meeting was given to the public pursuant to the provisions of the Open Meetings Act (Act 267, Public Acts of Michigan, 1976, as amended).



Secretary, Board of Education

CJI/keh

B. Approval of Bills for February
2025 totaling \$1,822,015.24

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A/P Check Register

Printed: 03/05/2025 8:52:44AM

COOR ISD

Check Date: 02/01/2025 to 2/28/2025

Vendor #	Vendor Name	Batch #	Check Date	Check #	Checks	Direct Deposit	Total
142228	ALICIA SMITH	9035	02/04/2025	105136	(21.44)	0.00	(21.44)
Void by KLM on 2/4/2025							
142216	ACD.NET	596	02/07/2025	105525	689.71	0.00	689.71
141879	ALEXIS WILSON	596	02/07/2025	105526	289.80	0.00	289.80
142228	ALICIA SMITH	596	02/07/2025	105527	21.44	0.00	21.44
141200	AMAZON CAPITAL SERVICES INC	596	02/07/2025	105528	3,401.83	0.00	3,401.83
141731	AMBER AKIN	596	02/07/2025	105530	457.10	0.00	457.10
141720	AMERICAN UNITED LIFE INSURANCE COMPANY	596	02/07/2025	105531	1,876.16	0.00	1,876.16
142241	ANCORA PUBLISHING	596	02/07/2025	105532	287.83	0.00	287.83
141145	AUSABLE MEDIA GROUP LLC	596	02/07/2025	105533	246.00	0.00	246.00
141990	AYESHA WEBER	596	02/07/2025	105534	189.00	0.00	189.00
142005	CENTRAL MICHIGAN UNIVERSITY	596	02/07/2025	105535	5,033.00	0.00	5,033.00
8392	CHARLTON HESTON ACADEMY	596	02/07/2025	105536	115,188.65	0.00	115,188.65
141891	CHILD & FAMILY SERVICES OF NORTHEAST MICHIGAN INC	596	02/07/2025	105537	328.00	0.00	328.00
19631	CHRISTINA TAPPAN	596	02/07/2025	105538	416.33	0.00	416.33
141698	COMPHEALTH MEDICAL STAFFING	596	02/07/2025	105539	10,070.37	0.00	10,070.37
4100	CONSUMERS ENERGY PAYMENT CENTER	596	02/07/2025	105540	3,241.91	0.00	3,241.91
4440	CRAWFORD AUSABLE SD	596	02/07/2025	105541	55.75	0.00	55.75
141894	CULLIGAN WATER CONDITIONING	596	02/07/2025	105542	58.00	0.00	58.00
4900	DEAN TRANSPORTATION INC	596	02/07/2025	105543	242.97	0.00	242.97
11056	DESIREE LIPSKI	596	02/07/2025	105544	30.00	0.00	30.00
5096	DEWEY'S AUTO REPAIR	596	02/07/2025	105545	243.56	0.00	243.56
142218	ELEVATE THERAPY COMPANY	596	02/07/2025	105546	6,760.00	0.00	6,760.00
141308	EMS EDUCATION	596	02/07/2025	105547	25.00	0.00	25.00
6115	FAIRVIEW EAGLE'S NEST PRESCHOOL	596	02/07/2025	105548	5,075.00	0.00	5,075.00
141697	FUN FIRST THERAPY PLLC	596	02/07/2025	105550	23,986.87	0.00	23,986.87
141738	GILL-ROY'S HARDWARE	596	02/07/2025	105551	58.24	0.00	58.24
142113	GOOGLE VOICE INC	596	02/07/2025	105552	118.90	0.00	118.90
7552	GRAYLING COOPERATIVE PRESCHOOL, INC.	596	02/07/2025	105553	61,427.89	0.00	61,427.89
7600	GRAYLING RECREATION AUTHORITY	596	02/07/2025	105554	945.00	0.00	945.00
141883	HANNAH VANCURA	596	02/07/2025	105555	23.66	0.00	23.66
141941	HELEN SHASTAL	596	02/07/2025	105556	310.00	0.00	310.00
8520	HOEKSTRA TRANSPORTATION INC	596	02/07/2025	105557	157,920.00	0.00	157,920.00
142025	HOUGHTON LAKE COOPERATIVE PRESCHOOL INC	596	02/07/2025	105558	71,219.55	0.00	71,219.55
142142	ILENE SMITH	596	02/07/2025	105559	76.58	0.00	76.58
9160	IMPACT OFFICE PRODUCTS	596	02/07/2025	105560	363.93	0.00	363.93
141911	INTEGRITY CONSTRUCTION SERVICES	596	02/07/2025	105561	5,000.00	0.00	5,000.00
142086	JENNIFER HART	596	02/07/2025	105562	119.00	0.00	119.00
71225	JOSEPH MOORE	596	02/07/2025	105563	42.61	0.00	42.61
141506	JOSH MEYER	596	02/07/2025	105564	18.88	0.00	18.88
141667	KAREN WALTON EBNIT	596	02/07/2025	105565	1,295.00	0.00	1,295.00
20457	KATHRYN VANWORMER WALDIE	596	02/07/2025	105566	65.40	0.00	65.40
10030	KATIE KEITH	596	02/07/2025	105567	393.33	0.00	393.33
10020	KEENAN THERAPEUTICS PC	596	02/07/2025	105568	16,692.02	0.00	16,692.02
141492	KERRI SMITZ	596	02/07/2025	105569	95.90	0.00	95.90
10250	KIRTLAND COMMUNITY COLLEGE	596	02/07/2025	105570	240.00	0.00	240.00
142036	KYM NARAYANA	596	02/07/2025	105571	44.00	0.00	44.00
5155	LI'L WILLIES	596	02/07/2025	105572	115.00	0.00	115.00
141972	LILLIE MEADOWS	596	02/07/2025	105573	279.86	0.00	279.86
9157	LOUIKO SUNDAY	596	02/07/2025	105574	64.40	0.00	64.40
12280	MAASE	596	02/07/2025	105575	270.00	0.00	270.00

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A/P Check Register

Printed: 03/05/2025 8:52:45AM

COOR ISD

Check Date: 02/01/2025 to 2/28/2025

Vendor #	Vendor Name	Batch #	Check Date	Check #	Checks	Direct Deposit	Total
8099	MARIE HARRIS	596	02/07/2025	105576	11.48	0.00	11.48
141656	MARK A SLOANE DO PC	596	02/07/2025	105577	5,000.00	0.00	5,000.00
141422	MELISA AKERS	596	02/07/2025	105578	70.00	0.00	70.00
11598	MELISSA MAEDER	596	02/07/2025	105579	315.60	0.00	315.60
142232	MFI MEDICAL	596	02/07/2025	105580	1,914.52	0.00	1,914.52
142179	MICHAEL EVANS	596	02/07/2025	105581	313.60	0.00	313.60
3753	MICHELE COCHRANE	596	02/07/2025	105582	165.49	0.00	165.49
15351	MICHELLE PATTERSON	596	02/07/2025	105583	213.50	0.00	213.50
13651	MIO AUSABLE SCHOOL DISTRICT	596	02/07/2025	105584	7,226.33	0.00	7,226.33
14205	NCS PEARSON, INC.	596	02/07/2025	105585	98.25	0.00	98.25
14545	NEMCSA	596	02/07/2025	105586	16,158.21	0.00	16,158.21
21278	NICOLE GRACE	596	02/07/2025	105587	61.50	0.00	61.50
14890	OGEMAW COUNTY PUBLIC TRANSIT	596	02/07/2025	105588	96.00	0.00	96.00
2445	PAUL H BROOKES PUBLISHING CO INC	596	02/07/2025	105589	502.40	0.00	502.40
15880	PITNEY BOWES INC	596	02/07/2025	105590	215.78	0.00	215.78
142245	PLAY THERAPY SUPPLY LLC	596	02/07/2025	105591	516.11	0.00	516.11
16390	RAY'S PARTS CENTER	596	02/07/2025	105592	310.62	0.00	310.62
141124	REBEKAH SEELOW	596	02/07/2025	105593	511.57	0.00	511.57
7160	ROSCOMMON AREA PUBLIC SCHOOLS	596	02/07/2025	105594	43,616.73	0.00	43,616.73
7161	ROSCOMMON FOOD SERVICE	596	02/07/2025	105595	160.00	0.00	160.00
17240	S & J EXCAVATING	596	02/07/2025	105596	4,800.00	0.00	4,800.00
141992	SHARON MCMILLAN	596	02/07/2025	105597	29.68	0.00	29.68
15685	SHAWN PETRI	596	02/07/2025	105598	188.90	0.00	188.90
142089	SKILLSUSA MICHIGAN	596	02/07/2025	105599	130.00	0.00	130.00
18555	SPARTAN STORES LLC	596	02/07/2025	105600	154.00	0.00	154.00
142249	SPICER GROUP	596	02/07/2025	105601	11,500.00	0.00	11,500.00
141649	STAPLES	596	02/07/2025	105602	284.38	0.00	284.38
18831	STATE OF MICHIGAN	596	02/07/2025	105603	21,037.00	0.00	21,037.00
18830	STATE OF MICHIGAN - LARA	596	02/07/2025	105604	3,477.50	0.00	3,477.50
18830	STATE OF MICHIGAN - LARA	596	02/07/2025	105605	875.00	0.00	875.00
141814	SUPERIOR AUTOMOTIVE EQUIPMENT	596	02/07/2025	105606	61.37	0.00	61.37
20152	TAMMY TYLER	596	02/07/2025	105607	333.80	0.00	333.80
7180	TERESA GERTISER	596	02/07/2025	105608	33.60	0.00	33.60
141511	THALMA HIBBARD	596	02/07/2025	105609	121.80	0.00	121.80
141839	THINK SOCIAL PUBLISHING INC	596	02/07/2025	105610	93.26	0.00	93.26
19800	THRUN LAW FIRM P.C.	596	02/07/2025	105611	5,140.50	0.00	5,140.50
141663	TOWN & COUNTRY STORAGE	596	02/07/2025	105612	660.00	0.00	660.00
141944	TRACEY STEIN	596	02/07/2025	105613	465.30	0.00	465.30
141582	VISION CONSULTING LLC	596	02/07/2025	105614	1,103.00	0.00	1,103.00
21181	WEST BRANCH ROSE CITY SCHOOL DISTRICT	596	02/07/2025	105615	194,027.32	0.00	194,027.32
21235	WEXFORD-MISSAUKEE ISD	596	02/07/2025	105616	120.00	0.00	120.00
2651	XELLO INC	596	02/07/2025	105617	285.71	0.00	285.71
142246	ROOSEN, VARCHETTI, & OLIVER PLLC	93	02/14/2025	105618	160.09	0.00	160.09
142226	STRATEGIC SOLUTION SERVICES	93	02/14/2025	105619	156.12	0.00	156.12
20310	UNITED WAY OF ROSCOMMON COUNTY	93	02/14/2025	105620	2.00	0.00	2.00
16128	FRED'S OF ROSCOMMON	596	02/14/2025	105621	126.00	0.00	126.00
12880	MESSA	99	02/17/2025	105622	7,886.59	0.00	7,886.59
225	AFLAC	99	02/21/2025	105623	1,155.14	0.00	1,155.14
141873	ALBANESE CONFECTIONERY GROUP INC	598	02/21/2025	105624	91.56	0.00	91.56
142254	ALYSSA FAULKNER	598	02/21/2025	105625	30.00	0.00	30.00
141200	AMAZON CAPITAL SERVICES INC	598	02/21/2025	105626	3,224.91	0.00	3,224.91
142241	ANCORA PUBLISHING	598	02/21/2025	105628	70.00	0.00	70.00

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A/P Check Register

Printed: 03/05/2025 8:52:45AM

COOR ISD

Check Date: 02/01/2025 to 2/28/2025

Vendor #	Vendor Name	Batch #	Check Date	Check #	Checks	Direct Deposit	Total
142253	ANTHONY BAIR	598	02/21/2025	105629	62.20	0.00	62.20
142247	AVI SYSTEMS INC	598	02/21/2025	105630	40.37	0.00	40.37
142157	BLUUM OF MINNESOTA	598	02/21/2025	105631	1,599.00	0.00	1,599.00
20535	BRENDA VAUGHAN-IDE	598	02/21/2025	105632	218.90	0.00	218.90
2575	BURMAX COMPANY, INC	598	02/21/2025	105633	1,706.97	0.00	1,706.97
142041	CHARLES BISSELL	598	02/21/2025	105634	230.30	0.00	230.30
141931	CHRISTINA PUDVAN	598	02/21/2025	105635	441.00	0.00	441.00
141698	COMPHEALTH MEDICAL STAFFING	598	02/21/2025	105636	12,438.23	0.00	12,438.23
16940	COUNTY OF ROSCOMMON COUNTY TREASURER	598	02/21/2025	105637	2,970.72	0.00	2,970.72
4400	CRAF CENTER	598	02/21/2025	105638	2,400.00	0.00	2,400.00
11005	CROWNE PLAZA LANSING WEST	598	02/21/2025	105639	136.26	0.00	136.26
4470	CRWFD CNTY TRANSP AUTH	598	02/21/2025	105640	1,204.00	0.00	1,204.00
142124	CRYSTAL DAVIS	598	02/21/2025	105641	60.20	0.00	60.20
141894	CULLIGAN WATER CONDITIONING	598	02/21/2025	105642	60.00	0.00	60.00
5096	DEWEY'S AUTO REPAIR	598	02/21/2025	105643	21.45	0.00	21.45
142101	DOUBLE TREE BY HILTON LANSING	598	02/21/2025	105644	401.25	0.00	401.25
5385	DTE ENERGY	598	02/21/2025	105645	4,293.56	0.00	4,293.56
8420	EAST HIGGINS LAKE TRUE VALUE	598	02/21/2025	105646	93.45	0.00	93.45
141691	EMILY GUBANCSIK	598	02/21/2025	105647	39.94	0.00	39.94
6781	FRONTIER	598	02/21/2025	105648	110.56	0.00	110.56
141697	FUN FIRST THERAPY PLLC	598	02/21/2025	105649	20,612.71	0.00	20,612.71
141738	GILL-ROY'S HARDWARE	598	02/21/2025	105650	2.99	0.00	2.99
141981	HEATHER SHARPE	598	02/21/2025	105651	23.80	0.00	23.80
142191	HIGGINS LAKE STORAGE	598	02/21/2025	105652	100.00	0.00	100.00
8520	HOEKSTRA TRANSPORTATION INC	598	02/21/2025	105653	2,168.90	0.00	2,168.90
141599	HOLIDAY INN & SUITES MOUNT PLEASANT	598	02/21/2025	105654	166.95	0.00	166.95
6195	IAN FAULKNER	598	02/21/2025	105655	30.00	0.00	30.00
9385	IOSCO RESA	598	02/21/2025	105656	136,118.98	0.00	136,118.98
142016	JAMIE MEAD	598	02/21/2025	105657	525.00	0.00	525.00
19892	KATHRYN TOONSTRA	598	02/21/2025	105658	111.82	0.00	111.82
141488	KATIE HARRIS	598	02/21/2025	105659	442.40	0.00	442.40
10020	KEENAN THERAPEUTICS PC	598	02/21/2025	105660	7,316.30	0.00	7,316.30
142251	MARZANO RESOURCES	598	02/21/2025	105661	196.00	0.00	196.00
141422	MELISA AKERS	598	02/21/2025	105662	237.90	0.00	237.90
12880	MESSA	598	02/21/2025	105663	96,053.33	0.00	96,053.33
142179	MICHAEL EVANS	598	02/21/2025	105667	210.00	0.00	210.00
142077	MICHELLE CULTON EKSTROM	598	02/21/2025	105668	520.00	0.00	520.00
141775	MICHELLE EWALD	598	02/21/2025	105669	384.20	0.00	384.20
15351	MICHELLE PATTERSON	598	02/21/2025	105670	105.00	0.00	105.00
13160	MSBO	598	02/21/2025	105671	2,190.00	0.00	2,190.00
21278	NICOLE GRACE	598	02/21/2025	105672	196.00	0.00	196.00
142255	NORTHERN INTENTION LLC	598	02/21/2025	105673	1,950.00	0.00	1,950.00
141494	POSITIVE PROMOTIONS INC	598	02/21/2025	105674	1,047.58	0.00	1,047.58
141263	PRESENCE LEARNING, INC.	598	02/21/2025	105675	3,449.00	0.00	3,449.00
16155	PUBLIC CONSULTING GROUP, INC	598	02/21/2025	105676	16,056.23	0.00	16,056.23
16250	QUILL CORP	598	02/21/2025	105677	244.22	0.00	244.22
16380	RAVEN ANALYTICAL LAB	598	02/21/2025	105678	60.00	0.00	60.00
16390	RAY'S PARTS CENTER	598	02/21/2025	105679	100.41	0.00	100.41
18430	REBECCA SOCIA	598	02/21/2025	105680	17.23	0.00	17.23
19081	ROBERT J GORDON DOFAA-INS PLLC	598	02/21/2025	105681	36.00	0.00	36.00
7160	ROSCCOMMON AREA PUBLIC SCHOOLS	598	02/21/2025	105682	136.03	0.00	136.03
17030	ROSCCOMMON COUNTY TRANSPORTATION AU	598	02/21/2025	105683	2,064.00	0.00	2,064.00
7161	ROSCCOMMON FOOD SERVICE	598	02/21/2025	105684	5,668.60	0.00	5,668.60

A/P Check Register

Printed: 03/05/2025 8:52:45AM

COOR ISD

Check Date: 02/01/2025 to 2/28/2025

Vendor #	Vendor Name	Batch #	Check Date	Check #	Checks	Direct Deposit	Total
17880	SEHI COMPUTER PRODUCTS INC	598	02/21/2025	105685	1,947.00	0.00	1,947.00
141133	SHANNON REA	598	02/21/2025	105686	447.94	0.00	447.94
19144	SUMMIT FIRE PROTECTION	598	02/21/2025	105687	852.90	0.00	852.90
141425	SUNNY SPOT	598	02/21/2025	105688	1,000.00	0.00	1,000.00
141582	VISION CONSULTING LLC	598	02/21/2025	105689	840.00	0.00	840.00
20900	WALMART BUSINESS CARD	598	02/21/2025	105690	142.84	0.00	142.84
21181	WEST BRANCH ROSE CITY SCHOOL DISTRICT	598	02/21/2025	105691	230,735.47	0.00	230,735.47
20970	WM CORPORATE SERVICES INC	598	02/21/2025	105692	564.55	0.00	564.55
21770	XEROX CORP	598	02/21/2025	105693	1,183.87	0.00	1,183.87
142246	ROOSEN, VARCHETTI, & OLIVER PLLC	93	02/28/2025	105694	125.83	0.00	125.83
142226	STRATEGIC SOLUTION SERVICES	93	02/28/2025	105695	132.30	0.00	132.30
19978	TSA CONSULTING GROUP INC	93	02/28/2025	105696	2,170.00	0.00	2,170.00
20310	UNITED WAY OF ROSCOMMON COUNTY	93	02/28/2025	105697	2.00	0.00	2.00
142190	CHEF KAYTIE LLC	600	02/25/2025	105705	289.00	0.00	289.00
4900	DEAN TRANSPORTATION INC	600	02/25/2025	105706	66,717.01	0.00	66,717.01
7410	GOODHEART-WILCOX PUBLISHER	600	02/25/2025	105707	3,234.24	0.00	3,234.24
9385	IOSCO RESA	600	02/25/2025	105708	20,218.42	0.00	20,218.42
142215	NATIONAL FATHERHOOD INITIATIVE	600	02/25/2025	105709	551.77	0.00	551.77
141676	SCHOLASTIC BOOK CLUBS	600	02/25/2025	105710	2,250.00	0.00	2,250.00
141649	STAPLES	600	02/25/2025	105711	248.37	0.00	248.37
141720	AMERICAN UNITED LIFE INSURANCE COMPANY	99	02/26/2025	105712	416.18	0.00	416.18
141103	ORS	94	02/07/2025	201705418	0.00	82,150.16	82,150.16
141105	HEALTH EQUITY	94	02/14/2025	201705419	0.00	2,573.51	2,573.51
20245	US TREASURY	94	02/14/2025	201705420	0.00	45,878.80	45,878.80
142167	BMO	597	02/05/2025	201705421	0.00	5,286.31	5,286.31
141103	ORS	94	02/21/2025	201705422	0.00	83,917.82	83,917.82
141785	ORS UAAL	94	02/21/2025	201705423	0.00	44,119.44	44,119.44
20245	US TREASURY	96	02/21/2025	201705424	0.00	176.88	176.88
141105	HEALTH EQUITY	94	02/28/2025	201705425	0.00	2,423.51	2,423.51
141106	MICHIGAN DEPT OF TREASURY	94	02/28/2025	201705426	0.00	15,711.62	15,711.62
20245	US TREASURY	94	02/28/2025	201705427	0.00	43,804.25	43,804.25
142166	JPMORGAN CHASE BANK NA	599	02/03/2025	201705428	0.00	4,139.10	4,139.10
Report Totals					\$1,491,833.84	\$330,181.40	\$1,822,015.24

C. Approve MILAF statement, Revenue
& Expenditure Reports for February
2025

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Account Statement - Transaction Summary

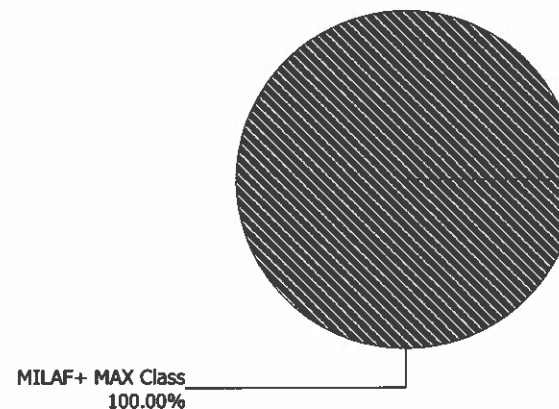
For the Month Ending February 28, 2025

C.O.O.R. INTERMEDIATE SCHOOL DISTRICT - General Fund - 203740

MILAF+ MAX Class	
Opening Market Value	4,054,618.29
Purchases	13,719.07
Redemptions	0.00
Unsettled Trades	0.00
Change in Value	0.00
Closing Market Value	\$4,068,337.36
Cash Dividends and Income	13,719.07

Asset Summary		
	February 28, 2025	January 31, 2025
MILAF+ MAX Class	4,068,337.36	4,054,618.29
Total	\$4,068,337.36	\$4,054,618.29

Asset Allocation	
MILAF+ MAX Class	100.00%





Account Statement

For the Month Ending **February 28, 2025**

C.O.O.R. INTERMEDIATE SCHOOL DISTRICT - General Fund - 203740

Trade Date	Settlement Date	Transaction Description	Share or Unit Price	Dollar Amount of Transaction	Total Shares Owned
MILAF+ MAX Class					
Opening Balance					4,054,618.29
02/28/25	03/03/25	Accrual Income Div Reinvestment - Distributions	1.00	13,719.07	4,068,337.36
Closing Balance					4,068,337.36

	Month of February	Fiscal YTD July-February		
Opening Balance	4,054,618.29	0.00	Closing Balance	4,068,337.36
Purchases	13,719.07	4,068,337.36	Average Monthly Balance	4,055,108.26
Redemptions (Excl. Checks)	0.00	0.00	Monthly Distribution Yield	4.41%
Check Disbursements	0.00	0.00		
Closing Balance	4,068,337.36	4,068,337.36		
Cash Dividends and Income	13,719.07	68,287.78		

**Revenue and Expenditure Report
GENERAL FUND
2/28/2025**

Revenue		February Activity	Open Encumbrance	Year to Date	Adopted Budget
100	Revenue from Local Sources	405,323	-	1,094,201	1,052,060
300	Revenue from State Sources	662,256	-	6,295,696	6,372,568
400	Revenues from Federal Sources	-	-	381,872	1,178,856
500	LEAs	-	-	156,909	361,761
600	Fund Modifications (Transfers In)	-	-	-	-
Total Revenue		1,067,579	-	7,928,679	8,965,245

Expense		February Activity	Open Encumbrance	Year to Date	Adopted Budget
125	Compensatory Education	-	-	3,641	3,641
211	Truancy	-	-	-	5,000
213	Behavioral Services	24,479	-	226,038	227,882
216	Social Work Services	26,192	33	424,062	898,519
221	Improvement of Instruction	44,091	271	466,897	844,369
226	Supervision of Instructional Staff	21,882	244	192,235	440,870
229	Other Instructional Staff Services	-	-	-	-
231	Board of Education	400	201	25,622	99,306
232	Executive Administration	38,156	1,555	374,940	496,277
252	Fiscal Services	22,473	595	211,585	279,184
259	Other Business Services	849	-	3,463	3,931
261	Operations Buildings Services	5,387	346	56,104	89,516
283	Staff/Personnel Services	-	-	1,209	2,000
284	Information Management Services	2,276	1,319	179,881	5,000
285	Pupil Accounting	7,338	-	65,687	311,210
299	Other Support Services	120	-	3,397	94,060
311	Community Services Direction	15,624	1,023	148,902	2,500
331	Community Activities	11,045	30,445	74,679	248,446
351	Custody and Care of Children	45,429	253	413,809	530,041
411	Payments to LEAs GSRP	275,342	-	1,661,379	2,993,102
445	TRAILS GRANT SEC 31 P	-	-	178,571	625,000
456	Building Improvements Services	-	-	-	15,000
626	Fund Modifications (Transfers Out)	-	-	-	530,000
Total Expense		541,082	36,285	4,712,101	8,744,854

Revenues over Expenses

3,216,578

3/3/2025
11:45 AM

**Revenue and Expenditure Report
SPECIAL EDUCATION FUND
2/28/2025**

Revenue		February Activity	Open Encumbrance	Year to Date	Adopted Budget
100	Revenue from Local Sources	1,065,903	-	2,989,929	3,828,604
300	Revenue from State Sources	547,329	-	1,837,884	3,252,273
400	Revenues from Federal Sources	31,784	-	1,106,800	3,060,437
500	Incoming Transfers and Other Transactions	-	-	343,836	722,284
600	Fund Modifications (Other Operating Transfers In)	-	-	-	-
Total Revenue		1,645,016	-	6,278,449	10,863,598

Expense		February Activity	Open Encumbrance	Year to Date	Adopted Budget
122	Instruction	208,094	9,415	1,601,534	2,504,629
212	Early On	11,563	21	84,155	323,543
213	Health Services	76,538	257	453,984	789,017
214	Psychological Services	23,040	109	184,519	324,700
215	Speech Pathology and Audiology Services	106,091	20	730,579	1,032,942
216	Social Work Services	25,509	-	149,985	335,086
217	Visual Aid Services	1,943	-	12,351	15,000
218	Teacher Consultant-Special Education Programs	-	-	6,212	-
221	Improvement of Instruction	75	-	4,100	9,907
226	Supervision and Direction of Instructional Staff	47,210	459	447,826	530,981
231, 232, 252	Board of Education, Fiscal, Executive	9,867	-	117,381	146,570
241	Office of the Principal	15,955	41	152,558	210,088
249	Graduation Supplies and Materials	-	-	-	1,000
259	Other Business Services	2,122	-	10,329	13,058
261	Operations Buildings Services	15,798	2,073	193,422	293,746
271	Pupil Transportation Services	234,276	-	638,854	1,162,719
281	Planning, Research, Development, and Evaluation	12,551	-	110,679	160,803
284	Information Management Services	510	144	17,474	14,933
299	Staff Appreciation	945	-	1,315	500
371	Non-Public School Pupils	1,640	-	12,846	30,000
411	Payments to LEAs	230,735	-	1,025,361	2,667,060
441	Payments to Other Govern. Entities	21,037	-	42,963	48,600
456	Building Improvements Services	20,853	-	66,978	52,500
Total Expense		1,066,352	12,539	6,065,406	10,667,381

Revenues over Expenses

213,044

3/3/2025
11:18 AM

**Revenue and Expenditure Report
ROOC FUND
2/28/2025**

Revenue

	February Activity	Open Encumbrance	Year to Date	Adopted Budget
INTEREST	-		63	200
PRODUCTION	2,995	-	13,922	40,700
DONATIONS	-		13,308	10,600
GRANTS	-		-	-
SERVICES	-	-	506,397	950,000
STATE	12,480		45,607	70,923
Total Revenue	15,474	-	579,297	1,072,423

Expense

232	Program Administration	12,194	624	129,610	182,747
252	Fiscal Services	1,482	-	13,812	19,597
259	Other Business Services	-	-	2,972	2,972
261	Operations Buildings Services	4,754	782	62,257	94,202
271	Transportation	3,629	-	33,572	54,057
284	Technology	-	-	320	1,000
289	Consumers	3,566	-	32,196	70,063
290	Staff Retention	-	-	-	500
321	Summer Work Program	348	-	35,574	45,649
391	Direct Care Workers and Supervision	37,881	11	333,397	484,999
	Total Expense	63,855	1,417	643,710	955,786

Revenues over Expenses

(64,412)

3/3/2025
10:53 AM

**Revenue and Expenditure Report
CAREER TECH FUND
2/28/2025**

Revenue		February Activity	Open Encumbrance	Year to Date	Adopted Budget
4000	PERKINS	-		108,286	154,477
3440	61 A	32,782		163,911	360,640
3550	61 B	40,704		203,521	447,792
3790	61 C	-		150,578	150,578
2530	61 I	-		91,550	91,550
0000	CTE	18,712		308,705	879,490
	Total Revenue	92,198	-	1,026,550	2,084,525

Expense		February Activity	Open Encumbrance	Year to Date	Adopted Budget
4000	PERKINS	16,291	6,938	148,243	154,477
3440	61 A	47,473	4,576	134,899	320,217
3550	61 B	177,271	-	221,941	447,792
3790	61 C	3,514	-	140,651	150,578
2530	61 I	-	-	91,484	91,484
0000	CTE	66,408	-	549,477	859,465
	Total Expense	310,957	11,514	1,286,695	2,024,012

Revenues over Expenses (260,145)

3/3/2025
10:00 AM

D. Approve 2025-26 ROOC calendar

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ROOC, INC. 2025-2026

JULY 2025						
S	M	T	W	TH	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

AUGUST 2025						
S	M	T	W	TH	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
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ROOC Closed

Professional Development

Holiday

7. Action Items

A. Update Policy 4113, ESTA and the related form, 4113-F

44

Series 4000: District Employment

4100 Employee Rights and Responsibilities

4113-F Michigan Earned Sick Time Act (ESTA) Form

ESTA Hire Notice

Pursuant to the Michigan Earned Sick Time Act (ESTA), an eligible employee generally (1) earns 1 hour of earned sick time for every 30 hours worked, but the District may cap use of earned sick time to 72 hours per ESTA benefit year, or (2) receives at least 72 hours of earned sick time at the beginning of the District's ESTA benefit year (prorated for a part-time employee under certain circumstances). The District's ESTA benefit year is the 12-month period from July 1 to June 30.

As a part-time employee, the District estimates that you will work approximately [REDACTED] hours during the District's ESTA benefit year, subject to the District's discretion and Board Policy.

Retaliatory personnel action by the employer against an employee for requesting or using earned sick time for which the employee is eligible is prohibited. An eligible employee may file a complaint with the Michigan Department of Labor and Economic Opportunity (LEO) for any ESTA violation.

Terms under which earned sick time may be used are identified in the ESTA and in District Policy 4113, which terms are incorporated by reference into this Notice. An eligible employee may use earned sick time for the following reasons:

1. the employee's mental or physical illness, injury, or health condition; medical diagnosis, care, or treatment of the employee's mental or physical illness, injury, or health condition; or preventative medical care for the employee;
2. for the employee's family member's mental or physical illness, injury, or health condition, medical diagnosis, care, or treatment of the employee's family member's mental or physical illness, injury, or health condition or preventative medical care for a family member of the employee;
3. if the employee or the employee's family member is a victim of domestic violence or sexual assault, for medical care or psychological or other counseling for physical or psychological injury or disability, to obtain services from a victim services organization, to relocate due to domestic violence or sexual assault, to obtain legal services, or to participate in any civil or criminal proceedings related to or resulting from the domestic violence or sexual assault;
4. for meetings at a child's school or place of care related to the child's health or disability, or the effects of domestic violence or sexual assault on the child; or
5. for closure of the employee's place of business by order of a public official due to a public health emergency, for an employee's need to care for a child whose school or

place of care has been closed by order of a public official due to a public health emergency, or when it has been determined by the health authorities having jurisdiction or by a health care provider that the employee's or employee's family member's presence in the community would jeopardize the health of others because of the employee's or family member's exposure to a communicable disease, whether or not the employee or family member has actually contracted the communicable disease.

A LEO ESTA brochure is attached to this notice, along with a copy of the ESTA.

EARNED SICK TIME ACT
Act 338 of 2018

AN ACT to require certain employers to provide certain employees with earned sick time that may be used for certain purposes; to specify the conditions for accruing and using earned sick time; to prohibit an employer from taking retaliatory personnel action against certain employees for certain acts; to provide for the powers and duties of certain state officers and entities; to provide for promulgation of rules; and to provide remedies and sanctions.

History: 2018, Act 338, Eff. Mar. 29, 2019;—Am. 2018, Act 369, Eff. Mar. 29, 2019;—2018, Act 338, Eff. Feb. 21, 2025;—Am. 2025, Act 2, Imd. Eff. Feb. 21, 2025.

Compiler's note: See *Mothering Justice v Attorney General*, case no. 165325, July 31, 2024. The Michigan Supreme Court held that 2018 PA 369 was unconstitutional and, therefore void and revived the original initiative as enacted by the Legislature on September 5, 2018, effective February 21, 2025.

The People of the State of Michigan enact:

408.961 Short title.

Sec. 1. This act shall be known and may be cited as the "earned sick time act".

History: 2018, Act 338, Eff. Mar. 29, 2019;—Am. 2018, Act 369, Eff. Mar. 29, 2019;—2018, Act 338, Eff. Feb. 21, 2025.

Compiler's note: Public Act 338 was proposed by initiative petition pursuant to Const. 1963, art 2, section 9. On September 5, 2018, the initiative petition was approved by an affirmative vote of the majority of the members of the Senate and an affirmative vote of the majority of the members of the House of Representatives, and filed with the Secretary of State on September 5, 2018.

For the transfer of powers and duties of the department of licensing and regulatory affairs to the department of labor and economic opportunity, see E.R.O. No. 2019-3, compiled at MCL 125.1998.

See *Mothering Justice v Attorney General*, case no. 165325, July 31, 2024. The Michigan Supreme Court held that 2018 PA 369 was unconstitutional and, therefore void and revived the original initiative as enacted by the Legislature on September 5, 2018, effective February 21, 2025. Therefore, the section above is as it was enacted before being amended by 2018 PA 369.

408.962 Definitions.

Sec. 2. As used in this act:

(a) "Department" means the department of labor and economic opportunity.

(b) "Director" means the director of the department or the director's designee.

(c) "Domestic partner" means an adult in a committed relationship with another adult, including both same-sex and different-sex relationships. As used in this subdivision, "committed relationship" means a relationship in which the employee and another individual share responsibility for a significant measure of each other's common welfare, such as any relationship between individuals of the same or different sex that is granted legal recognition by a state, political subdivision, or the District of Columbia as a marriage or analogous relationship, including, but not limited to, a civil union.

(d) "Domestic violence" means that term as defined in section 1 of 1978 PA 389, MCL 400.1501.

(e) "Earned sick time" means time off from work that is provided by an employer to an employee, whether paid or unpaid, that can be used for the purposes described in section 4.

(f) "Employee" means an individual engaged in service to an employer in the business of the employer. Employee does not include any of the following:

(i) An individual employed by the United States government.

(ii) An individual who works in accordance with a policy of an employer if both of the following conditions are met:

(A) The policy allows the individual to schedule the individual's own working hours.

(B) The policy prohibits the employer from taking adverse personnel action against the individual if the individual does not schedule a minimum number of working hours.

(iii) An unpaid trainee or unpaid intern.

(iv) An individual who is employed in accordance with the youth employment standards act, 1978 PA 90, MCL 409.101 to 409.124.

(g) "Employer" means any person, firm, business, educational institution, corporation, limited liability company, government entity, or other entity that employs 1 or more individuals. Employer does not include the United States government.

(h) "Family member" includes all of the following:

(i) A biological, adopted or foster child, stepchild or legal ward, a child of a domestic partner, or a child to whom the employee stands in loco parentis.

(ii) A biological parent, foster parent, stepparent, or adoptive parent or a legal guardian of an employee or

an employee's spouse or domestic partner or an individual who stood in loco parentis when the employee was a minor child.

(iii) An individual to whom the employee is legally married under the laws of any state or a domestic partner.

(iv) A grandparent.

(v) A grandchild.

(vi) A biological, foster, or adopted sibling.

(vii) An individual related by blood to the employee.

(viii) An individual whose close association with the employee is the equivalent of a family relationship.

(i) "Health care professional" means any of the following:

(i) A person licensed under federal law or the law of this state to provide health care services, including, but not limited to, nurses, doctors, and emergency room personnel.

(ii) A certified midwife.

(j) "Retaliatory personnel action" means any of the following:

(i) Denial of any right guaranteed under this act.

(ii) A threat, discharge, suspension, demotion, reduction of hours, or other adverse personnel action against an employee or former employee for exercise of a right guaranteed under this act.

(iii) Sanctions against an employee who is a recipient of public benefits for exercise of a right guaranteed under this act.

(iv) Interference with, or punishment for, an individual's participation in any manner in an investigation, proceeding, or hearing under this act.

(k) "Sexual assault" means any act that constitutes a violation of section 520b, 520c, 520d, 520e, or 520g of the Michigan penal code, 1931 PA 328, MCL 750.520b, 750.520c, 750.520d, 750.520e, and 750.520g.

(l) "Small business" means an employer for which 10 or fewer individuals work for compensation during a given week. In determining the number of individuals performing work for compensation during a given week, all individuals performing work for compensation on a full-time, part-time, or temporary basis must be counted, including individuals made available to work through the services of a temporary services or staffing agency or similar entity. An employer is not a small business if it maintained more than 10 employees on its payroll during any 20 or more calendar workweeks in either the current or immediately preceding calendar year.

(m) "Unpaid trainee or unpaid intern" means an individual who receives training from an employer in accordance with all of the following:

(i) The training the individual receives is similar to the experience provided in a vocational school.

(ii) The training is for the benefit of the individual.

(iii) The individual does not displace the employer's employees, but works under close supervision.

(iv) The employer receives no immediate advantage from the activities of the individual and, on occasion, the employer's operations may be impeded by the individual.

(v) The individual is not entitled to a job at the conclusion of the training.

(vi) The employer and the individual understand that the individual is not entitled to wages for time spent in training.

History: 2018, Act 338, Eff. Mar. 29, 2019;—Am. 2018, Act 369, Eff. Mar. 29, 2019;—2018, Act 338, Eff. Feb. 21, 2025;—Am. 2025, Act 2, Imd. Eff. Feb. 21, 2025.

Compiler's note: Public Act 338 was proposed by initiative petition pursuant to Const. 1963, art 2, section 9. On September 5, 2018, the initiative petition was approved by an affirmative vote of the majority of the members of the Senate and an affirmative vote of the majority of the members of the House of Representatives, and filed with the Secretary of State on September 5, 2018.

For the transfer of powers and duties of the department of licensing and regulatory affairs to the department of labor and economic opportunity, see E.R.O. No. 2019-3, compiled at MCL 125.1998.

See *Mothering Justice v Attorney General*, case no. 165325, July 31, 2024. The Michigan Supreme Court held that 2018 PA 369 was unconstitutional and, therefore void and revived the original initiative as enacted by the Legislature on September 5, 2018, effective February 21, 2025. Therefore, the section above is as it was enacted before being amended by 2018 PA 369.

408.963 Earned sick time to be provided by employer; alternatives; accrual; use; carry over; "year" defined; workweek; compliance; pay rate; replacement worker not required.

Sec. 3. (1) An employer shall provide earned sick time to each of the employer's employees in this state.

(2) Except as otherwise provided in section 12, this subsection, and subsection (4), an employee of a small business must accrue a minimum of 1 hour of paid earned sick time for every 30 hours worked, not including hours used as paid time off, but may not use more than 40 hours of paid earned sick time in a year unless the employer selects a higher limit. As an alternative to the accrual of paid earned sick time, a small business may provide an employee not less than 40 hours of paid earned sick time at the beginning of a year for immediate

use. Notwithstanding the requirements of subsection (6), this act does not require a small business to do any of the following until October 1, 2025:

- (a) Allow an employee to accrue paid earned sick time in accordance with this subsection.
- (b) Provide paid earned sick time to an employee as an alternative to the accrual of paid earned sick time.
- (c) Calculate and track an employee's accrual of paid earned sick time.

(3) Except as otherwise provided in this subsection and subsection (4), all other employees must accrue a minimum of 1 hour of paid earned sick time for every 30 hours worked, not including hours used as paid time off, but may not use more than 72 hours of paid earned sick time in a year, unless the employer selects a higher limit. As an alternative to the accrual of paid earned sick time, an employer may provide an employee not less than 72 hours of paid earned sick time at the beginning of a year for immediate use.

(4) As an alternative to the accrual of paid earned sick time, an employer that employs a part-time employee may provide paid earned sick time to the part-time employee at the beginning of a year for immediate use in accordance with all of the following requirements:

(a) The employer provides the part-time employee with a written notice of how many hours the part-time employee is expected to work for a year at the time of hire.

(b) The amount of earned sick time provided to the part-time employee at the beginning of the year is, at a minimum, proportional to the earned sick time that the part-time employee would accrue if the part-time employee worked all of the hours expected as provided in the written notice.

(c) If the part-time employee works more hours than what is expected as provided in the written notice, the employer must provide the part-time employee with additional earned sick time in accordance with the accrual requirements under this section.

(5) Subject to the requirements of this subsection, earned sick time carries over from year to year, but a small business is not required to allow an employee to use more than 40 hours of paid earned sick time in a single year, and all other employers are not required to allow an employee to use more than 72 hours of paid earned sick time in a single year. An employer shall allow an employee to carry over all of the employee's unused accrued paid earned sick time not to exceed 72 hours or, if the employer is a small business, not to exceed 40 hours from 1 year to the next year, unless the employer selects a higher limit. This act does not require an employer that provides paid earned sick time at the beginning of a year as described in subsections (2) to (4) to do any of the following:

- (a) Allow an employee to carry over any unused earned sick time from 1 year to the next year.
- (b) Calculate and track an employee's accrual of paid earned sick time.

(c) Pay the employee the value of the employee's unused accrued paid earned sick time at the end of the year in which the earned sick time was accrued.

(6) Earned sick time as provided in this section begins to accrue on the effective date of this act, or upon commencement of the employee's employment, whichever is later. An employee may use accrued earned sick time as it is accrued, except that an employer may require an employee hired after the effective date of the 2025 amendatory act that amended this section to wait until 120 calendar days after commencing employment before using accrued earned sick time.

(7) An employer is in compliance with this section if the employer meets either of the following conditions:

(a) Provides the employer's employees with paid time off in not less than the same amounts of time off as provided under this act that may be used for the purposes described in section 4 or any other purpose. If an employee uses paid time off as described in this subdivision for the purposes described in section 4, this act applies to the use of that paid time off. This act does not require an employer that provides paid time off as described in this subdivision to allow an employee to use paid time off for the purposes described in section 4 in an amount that exceeds the amounts of time off provided under this act.

(b) The employer is a signatory to a collective bargaining agreement that requires contributions to a multiemployer plan as that term is defined in section 3 of subtitle A of title I of the employee retirement income security act of 1974, 29 USC 1002, that may be used under the same conditions as provided for under this act, in an amount equal to or greater than what is required to be provided under this act, and that accrues at a rate equal to or greater than the rate described in subsections (2) and (3). This act does not require a multiemployer plan that provides benefits in accordance with this act to pay accrued paid sick leave benefits if an employer does not remit required contributions to the plan. If an employer does not make required contributions to the multiemployer plan as provided in this subdivision, the employer is not considered to be in compliance with the employer's obligations under this act.

(8) An employer shall pay each employee using paid earned sick time at a pay rate equal to the greater of either the normal hourly wage or base wage for that employee or the minimum wage established under the improved workforce opportunity wage act, 2018 PA 337, MCL 408.931 to 408.945, but not less than the

minimum wage rate established in section 4 of the improved workforce opportunity wage act, 2018 PA 337, MCL 408.934. This act does not require an employer to include overtime pay, holiday pay, bonuses, commissions, supplemental pay, piece-rate pay, tips, or gratuities in the calculation of an employee's normal hourly wage or base wage.

(9) An employer shall not require an employee to search for or secure a replacement worker as a condition for using earned sick time.

(10) For purposes of subsections (2) to (5), "year" means a regular and consecutive 12-month period, as determined by an employer.

(11) For purposes of earned sick time accrual under this act, all of the following apply:

(a) An employee who is exempt from overtime requirements under section 13(a)(1) of the fair labor standards act, 29 USC 213, is assumed to work 40 hours in each workweek unless the employee's normal workweek is less than 40 hours, in which case earned sick time accrues based on that normal workweek.

(b) An employee who is covered under 29 CFR 825.801 is assumed to have worked not less than 40 hours in each workweek or is assumed to have worked not less than 30 hours if employed by a small business.

History: 2018, Act 338, Eff. Mar. 29, 2019;—Am. 2018, Act 369, Eff. Mar. 29, 2019;—2018, Act 338, Eff. Feb. 21, 2025;—Am. 2025, Act 2, Imd. Eff. Feb. 21, 2025.

Compiler's note: Public Act 338 was proposed by initiative petition pursuant to Const. 1963, art 2, section 9. On September 5, 2018, the initiative petition was approved by an affirmative vote of the majority of the members of the Senate and an affirmative vote of the majority of the members of the House of Representatives, and filed with the Secretary of State on September 5, 2018.

For the transfer of powers and duties of the department of licensing and regulatory affairs to the department of labor and economic opportunity, see E.R.O. No. 2019-3, compiled at MCL 125.1998.

See *Mothering Justice v Attorney General*, case no. 165325, July 31, 2024. The Michigan Supreme Court held that 2018 PA 369 was unconstitutional and, therefore void and revived the original initiative as enacted by the Legislature on September 5, 2018, effective February 21, 2025. Therefore, the section above is as it was enacted before being amended by 2018 PA 369.

408.963a Waiting period; exception; contributions to multiemployer plan.

Sec. 3a. An employer that makes contributions to a multiemployer plan as described in section 3(7)(b) shall not require an employee to wait until 120 calendar days after commencing employment with that employer before using unused accrued earned sick time and nonforfeited paid sick leave benefits that were earned as a result of past service for a different employer that also made contributions to the same multiemployer plan or any paid sick leave benefits earned by working under the collective bargaining agreement for that employer. Contributions required under the collective bargaining agreement or other employment agreement for the paid sick leave plan are due on the same schedule as the other fringe benefit funds or plans to which the signatory employer must contribute.

History: Add. 2025, Act 2, Imd. Eff. Feb. 21, 2025.

408.964 Earned sick time; permissible uses; advance notice; incremental use; documentation; disclosure of details relating to domestic violence or sexual assault or family member's medical condition; other purposes.

Sec. 4. (1) An employer shall allow an employee to use the earned sick time accrued or provided under section 3 for any of the following purposes:

(a) The employee's mental or physical illness, injury, or health condition; medical diagnosis, care, or treatment of the employee's mental or physical illness, injury, or health condition; or preventative medical care for the employee.

(b) For the employee's family member's mental or physical illness, injury, or health condition, medical diagnosis, care, or treatment of the employee's family member's mental or physical illness, injury, or health condition or preventative medical care for a family member of the employee.

(c) If the employee or the employee's family member is a victim of domestic violence or sexual assault, for medical care or psychological or other counseling for physical or psychological injury or disability, to obtain services from a victim services organization, to relocate due to domestic violence or sexual assault, to obtain legal services, or to participate in any civil or criminal proceedings related to or resulting from the domestic violence or sexual assault.

(d) For meetings at a child's school or place of care related to the child's health or disability, or the effects of domestic violence or sexual assault on the child.

(e) For closure of the employee's place of business by order of a public official due to a public health emergency, for an employee's need to care for a child whose school or place of care has been closed by order of a public official due to a public health emergency, or when it has been determined by the health authorities having jurisdiction or by a health care provider that the employee's or employee's family member's presence in the community would jeopardize the health of others because of the employee's or family member's

exposure to a communicable disease, whether or not the employee or family member has actually contracted the communicable disease.

(2) If the employee's need to use earned sick time is foreseeable, an employer may require advance notice, not to exceed 7 days before the date the earned sick time is to begin, of the intention to use the earned sick time.

(3) If the employee's need for the earned sick time is not foreseeable, an employer, may require the employee to give notice of the intention in either of the following manners:

(a) As soon as practicable.

(b) In accordance with the employer's policy related to requesting or using sick time or leave if both of the following are met:

(i) On the date of the employee's hire, on the effective date of the 2025 amendatory act that added this subparagraph, or on the date that the employer's policy takes effect, whichever is latest, the employer provides the employee with a written copy of the policy that includes procedures for how the employee must provide notice.

(ii) The employer's notice requirement allows the employee to provide notice after the employee is aware of the need for the earned sick time.

(4) An employer that requires notice for sick time that is not foreseeable under subsection (3)(b) shall not deny an employee's use of earned sick time that is not foreseeable if either of the following conditions applies:

(a) The employer did not provide a written policy to the employee as required under subsection (3)(b)(i).

(b) The employer made a change to the written policy and did not provide notice of the change to the employee within 5 days after the change.

(5) Earned sick time may be used in 1-hour increments or the smallest increment that the employer uses to account for absences of use of other time.

(6) For earned sick time of more than 3 consecutive days, an employer may require reasonable documentation that the earned sick time has been used for a purpose described in subsection (1). Upon the employer's request, the employee must provide the documentation to the employer not more than 15 days after the employer's request. The employer shall not delay the commencement of earned sick time on the basis that the employer has not yet received documentation. Documentation signed by a health care professional indicating that earned sick time is necessary is reasonable documentation for purposes of this subsection. In cases of domestic violence or sexual assault, any of the following types of documentation selected by the employee are considered reasonable documentation:

(a) A police report indicating that the employee or the employee's family member was a victim of domestic violence or sexual assault.

(b) A signed statement from a victim and witness advocate affirming that the employee or employee's family member is receiving services from a victim services organization.

(c) A court document indicating that the employee or employee's family member is involved in legal action related to domestic violence or sexual assault.

(7) An employer shall not require that the documentation explain the nature of the illness or the details of the violence. If an employer chooses to require documentation for earned sick time, the employer is responsible for paying all out-of-pocket expenses the employee incurs in obtaining the documentation. If the employee does have health insurance, the employer is responsible for paying any costs charged to the employee by the health care provider for providing the specific documentation required by the employer.

(8) An employer shall not require disclosure of details relating to domestic violence or sexual assault or the details of an employee's or an employee's family member's medical condition as a condition of providing earned sick time under this act. If an employer possesses health information or information pertaining to domestic violence or sexual assault about an employee or employee's family member, the employer shall treat that information as confidential and shall not disclose that information except to the affected employee or with the permission of the affected employee.

(9) This act does not require an employer to provide earned sick time for any purposes other than as described in this section.

History: 2018, Act 338, Eff. Mar. 29, 2019;—Am. 2018, Act 369, Eff. Mar. 29, 2019;—2018, Act 338, Eff. Feb. 21, 2025;—Am. 2025, Act 2, Imd. Eff. Feb. 21, 2025.

Compiler's note: Public Act 338 was proposed by initiative petition pursuant to Const. 1963, art 2, section 9. On September 5, 2018, the initiative petition was approved by an affirmative vote of the majority of the members of the Senate and an affirmative vote of the majority of the members of the House of Representatives, and filed with the Secretary of State on September 5, 2018.

For the transfer of powers and duties of the department of licensing and regulatory affairs to the department of labor and economic opportunity, see E.R.O. No. 2019-3, compiled at MCL 125.1998.

See *Mothering Justice v Attorney General*, case no. 165325, July 31, 2024. The Michigan Supreme Court held that 2018 PA 369 was unconstitutional and, therefore void and revived the original initiative as enacted by the Legislature on September 5, 2018, effective Rendered Wednesday, February 26, 2025

February 21, 2025. Therefore, the section above is as it was enacted before being amended by 2018 PA 369.

408.965 Transfer of employee to separate division, entity, or location; retention of earned sick time; reinstatement; successor employer; unused earned sick time.

Sec. 5. (1) If an employee is transferred to a separate division, entity, or location, but remains employed by the same employer, the employee retains all earned sick time that was accrued at the prior division, entity, or location and may use all accrued earned sick time as provided in section 4. If an employee separates from employment and is rehired by the same employer not more than 2 months after the separation, the employer shall reinstate previously accrued, unused earned sick time and shall allow the reinstated employee to use that earned sick time and accrue additional earned sick time upon reinstatement. This subsection does not apply if an employer pays an employee the value of the employee's unused accrued earned sick time at the time of a transfer or separation.

(2) If a different employer succeeds or takes the place of an existing employer, the successor employer assumes the responsibility for the earned sick time rights that employees who remain employed by the successor employer accrued under the original employer. Those employees are entitled to use earned sick time previously accrued on the terms provided in this act. This subsection does not apply if an employer pays an employee the value of the employee's unused accrued earned sick time at the time of a succession.

(3) This act does not require an employer to provide financial or other reimbursement to an employee for accrued earned sick time that was not used upon the employee's termination, resignation, retirement, or other separation from employment.

History: 2018, Act 338, Eff. Mar. 29, 2019;—Am. 2018, Act 369, Eff. Mar. 29, 2019;—2018, Act 338, Eff. Feb. 21, 2025;—Am. 2025, Act 2, Imd. Eff. Feb. 21, 2025.

Compiler's note: Public Act 338 was proposed by initiative petition pursuant to Const. 1963, art 2, section 9. On September 5, 2018, the initiative petition was approved by an affirmative vote of the majority of the members of the Senate and an affirmative vote of the majority of the members of the House of Representatives, and filed with the Secretary of State on September 5, 2018.

For the transfer of powers and duties of the department of licensing and regulatory affairs to the department of labor and economic opportunity, see E.R.O. No. 2019-3, compiled at MCL 125.1998.

See *Mothers Justice v Attorney General*, case no. 165325, July 31, 2024. The Michigan Supreme Court held that 2018 PA 369 was unconstitutional and, therefore void and revived the original initiative as enacted by the Legislature on September 5, 2018, effective February 21, 2025. Therefore, the section above is as it was enacted before being amended by 2018 PA 369.

408.966 Exercise of rights under act; interference, restraint, or denial prohibited; retaliatory personnel action or discrimination prohibited; absence control policy leading to or resulting in retaliatory personnel action prohibited; person mistakenly alleging violation.

Sec. 6. (1) An employer or any other person shall not interfere with, restrain, or deny the exercise of, or the attempt to exercise, any right protected under this act.

(2) An employer shall not take retaliatory personnel action or discriminate against an employee because the employee has exercised a right protected under this act. Rights protected by this act include, but are not limited to, the right to use earned sick time under this act, the right to file a complaint or inform any person about any employer's alleged violation of this act, the right to cooperate with the department in the department's investigations of alleged violations of this act, and the right to inform any person of the person's rights under this act.

(3) An employer's absence control policy must not treat earned sick time taken under this act as an absence that may lead to or result in retaliatory personnel action.

(4) The protections in this section apply to any person that mistakenly but in good faith alleges a violation of this section.

(5) An employer may take adverse personnel action against an employee if the employee uses earned sick time for a purpose other than a purpose described in section 4, or violates the notice requirements under this act.

History: 2018, Act 338, Eff. Mar. 29, 2019;—Repealed 2018, Act 369, Eff. Mar. 29, 2019;—2018, Act 338, Eff. Feb. 21, 2025;—Am. 2025, Act 2, Imd. Eff. Feb. 21, 2025.

Compiler's note: The repealed section pertained to the exercise of rights and the prohibition of retaliatory personnel action or discrimination.

See *Mothers Justice v Attorney General*, case no. 165325, July 31, 2024. The Michigan Supreme Court held that 2018 PA 369 was unconstitutional and, therefore void and revived the original initiative as enacted by the Legislature on September 5, 2018, effective February 21, 2025. Therefore, the section above is as it was enacted before being repealed by 2018 PA 369.

408.967 Violation of act; enforcement by director; civil remedies; civil fine.

Sec. 7. (1) If an employer violates this act, the employee affected by the violation, at any time not later than 3 years after the violation, may file a claim with the department. The department shall investigate the

claim.

(2) The director shall enforce the provisions of this act. In enforcing this act, the director shall do both of the following:

(a) Establish a system that uses multiple means of communication to receive complaints that are related to noncompliance with this act.

(b) Investigate complaints received by the department in a timely manner.

(3) Any person that alleges a violation of this act has the right to file a complaint with the department. The department shall encourage reporting pursuant to this subsection by keeping confidential, to the maximum extent permitted by applicable laws, the name and other identifying information of the employee or person reporting the violation. However, if the person provides authorization to the department, the department may disclose the person's name and identifying information as necessary to enforce this act or for other appropriate purposes.

(4) Upon receiving a complaint alleging a violation of this act, the department shall investigate the complaint and attempt to resolve it through mediation between the complainant and the subject of the complaint, or other means. The department shall keep a complainant notified regarding the status of the complainant's complaint and any resultant investigation. If the department believes that a violation has occurred, it shall issue to the offending person or entity a notice of violation and the relief required of the offending person or entity. The department shall prescribe the form and wording of such notices of violation including any method of appealing the decision of the department.

(5) The department may impose penalties and grant an employee or former employee all appropriate relief, including but not limited to, payment of all earned sick time improperly withheld, any and all damages incurred by the complaint as the result of violation of this act, back pay, and reinstatement in the case of job loss.

(6) If the director determines that there is reasonable cause to believe that an employer violated this act and the department is subsequently unable to obtain voluntary compliance by the employer within a reasonable time, the department shall bring a civil action on behalf of the employee. The department may investigate and file a civil action on behalf of all employees of that employer who are similarly situated at the same worksite. Except as otherwise provided under section 12, a contract or agreement between the employer and the employee or any acceptance by the employee of a paid or unpaid leave policy that provides fewer rights or benefits than provided by this act is void and unenforceable.

(7) In addition to liability for civil remedies described in this section, an employer that takes retaliatory personnel action against an employee or former employee is subject to a civil fine of not more than \$1,000.00 for each violation.

(8) In addition to liability for civil remedies described in this section, an employer that fails to provide earned sick time to an employee in violation of this act is subject to a civil fine of not more than 8 times the employee's normal hourly wage.

(9) An employer that willfully violates a notice or posting requirement of section 8 is subject to a civil fine of not more than \$100.00 for each violation.

History: 2018, Act 338, Eff. Mar. 29, 2019;—Am. 2018, Act 369, Eff. Mar. 29, 2019;—2018, Act 338, Eff. Feb. 21, 2025;—Am. 2025, Act 2, Imd. Eff. Feb. 21, 2025.

Compiler's note: Public Act 338 was proposed by initiative petition pursuant to Const. 1963, art 2, section 9. On September 5, 2018, the initiative petition was approved by an affirmative vote of the majority of the members of the Senate and an affirmative vote of the majority of the members of the House of Representatives, and filed with the Secretary of State on September 5, 2018.

For the transfer of powers and duties of the department of licensing and regulatory affairs to the department of labor and economic opportunity, see E.R.O. No. 2019-3, compiled at MCL 125.1998.

See *Mothering Justice v Attorney General*, case no. 165325, July 31, 2024. The Michigan Supreme Court held that 2018 PA 369 was unconstitutional and, therefore void and revived the original initiative as enacted by the Legislature on September 5, 2018, effective February 21, 2025. Therefore, the section above is as it was enacted before being amended by 2018 PA 369.

408.968 Written notice to employee; contents; language; display of poster; creation by department; availability.

Sec. 8. (1) An employer subject to this act shall provide written notice to each employee at the time of hiring or not later than 30 days the effective date of the 2025 amendatory act that amended this section, whichever is later, including, but not limited to, all of the following:

(a) The amount of earned sick time required to be provided to an employee under this act.

(b) The employer's choice of how to calculate a year as that term is defined under section 3.

(c) The terms under which earned sick time may be used.

(d) That retaliatory personnel action taken by the employer against an employee for requesting or using earned sick time for which the employee is eligible is prohibited.

(e) The employee's right to file a complaint with the department for any violation of this act.

(2) The notice required under subsection (1) shall be in English, Spanish, and any language that is the first language spoken by at least 10% of the employer's workforce, if the department has translated the notice into that language.

(3) An employer shall display a poster at the employer's place of business, in a conspicuous place that is accessible to employees, that contains the information in subsection (1). The poster displayed must be in English, Spanish, and any language that is the first language spoken by not less than 10% of the employer's workforce, if the department has translated the poster into that language.

(4) The department shall create and make available to employers notices and posters that contain the information required under subsection (1) for the employers' use in complying with this section. The department shall provide the notices and posters in English, Spanish, and any other language deemed appropriate by the department.

History: 2018, Act 338, Eff. Mar. 29, 2019;—Am. 2018, Act 369, Eff. Mar. 29, 2019;—2018, Act 338, Eff. Feb. 21, 2025;—Am. 2025, Act 2, Imd. Eff. Feb. 21, 2025.

Compiler's note: Public Act 338 was proposed by initiative petition pursuant to Const. 1963, art 2, section 9. On September 5, 2018, the initiative petition was approved by an affirmative vote of the majority of the members of the Senate and an affirmative vote of the majority of the members of the House of Representatives, and filed with the Secretary of State on September 5, 2018.

For the transfer of powers and duties of the department of licensing and regulatory affairs to the department of labor and economic opportunity, see E.R.O. No. 2019-3, compiled at MCL 125.1998.

See *Mothering Justice v Attorney General*, case no. 165325, July 31, 2024. The Michigan Supreme Court held that 2018 PA 369 was unconstitutional and, therefore void and revived the original initiative as enacted by the Legislature on September 5, 2018, effective February 21, 2025. Therefore, the section above is as it was enacted before being amended by 2018 PA 369.

408.969 Multilingual outreach program.

Sec. 9. The department shall develop and implement a multilingual outreach program to inform employees, parents, and persons who are under the care of a health care provider about the availability of earned sick time under this act. This program must include distribution of notices and other written material in English and in other languages to child care and elder care providers, domestic violence shelters, schools, hospitals, community health centers, and other health care providers.

History: 2018, Act 338, Eff. Mar. 29, 2019;—Repealed 2018, Act 369, Eff. Mar. 29, 2019;—2018, Act 338, Eff. Feb. 21, 2025.

Compiler's note: The repealed section pertained to a multilingual outreach program.

See *Mothering Justice v Attorney General*, case no. 165325, July 31, 2024. The Michigan Supreme Court held that 2018 PA 369 was unconstitutional and, therefore void and revived the original initiative as enacted by the Legislature on September 5, 2018, effective February 21, 2025. Therefore, the section above is as it was enacted before being repealed by 2018 PA 369.

408.970 Retention of records.

Sec. 10. An employer shall retain for not less than 3 years records documenting the hours worked and earned sick time taken by employees. To monitor compliance with the requirements of this act, an employer shall allow the department access to those records, with appropriate notice and at a mutually agreeable time. If a question arises as to whether an employer has violated an employee's right to earned sick time under this act and the employer does not maintain or retain adequate records documenting the hours worked and earned sick time taken by the employee or does not allow the department reasonable access to those records, there is a presumption that the employer has violated the act, which can be rebutted only by clear and convincing evidence.

History: 2018, Act 338, Eff. Mar. 29, 2019;—Am. 2018, Act 369, Eff. Mar. 29, 2019;—2018, Act 338, Eff. Feb. 21, 2025.

Compiler's note: Public Act 338 was proposed by initiative petition pursuant to Const. 1963, art 2, section 9. On September 5, 2018, the initiative petition was approved by an affirmative vote of the majority of the members of the Senate and an affirmative vote of the majority of the members of the House of Representatives, and filed with the Secretary of State on September 5, 2018.

For the transfer of powers and duties of the department of licensing and regulatory affairs to the department of labor and economic opportunity, see E.R.O. No. 2019-3, compiled at MCL 125.1998.

See *Mothering Justice v Attorney General*, case no. 165325, July 31, 2024. The Michigan Supreme Court held that 2018 PA 369 was unconstitutional and, therefore void and revived the original initiative as enacted by the Legislature on September 5, 2018, effective February 21, 2025. Therefore, the section above is as it was enacted before being amended by 2018 PA 369.

408.971 Other law, regulation, requirement, policy, or standard, including collective bargaining agreement; scope and limitation of act.

Sec. 11. (1) This act provides minimum requirements pertaining to earned sick time and shall not be construed to preempt, limit, or otherwise affect the applicability of any other law, regulation, requirement, policy, or standard, including a collective bargaining agreement, that provides for greater accrual or use of time off, whether paid or unpaid, or that extends other protections to employees.

(2) This act does not do any of the following:

- (a) Prohibit an employer from providing more earned sick time than is required under this act.
- (b) Diminish any rights provided to any employee under a collective bargaining agreement.
- (c) Subject section 12, preempt or override the terms of any collective bargaining agreement in effect prior to the effective date of this act.
- (d) Prohibit an employer from establishing a policy that permits an employee to donate unused accrued earned sick time to another employee.

History: 2018, Act 338, Eff. Mar. 29, 2019;—Am. 2018, Act 369, Eff. Mar. 29, 2019;—2018, Act 338, Eff. Feb. 21, 2025.

Compiler's note: Public Act 338 was proposed by initiative petition pursuant to Const. 1963, art 2, section 9. On September 5, 2018, the initiative petition was approved by an affirmative vote of the majority of the members of the Senate and an affirmative vote of the majority of the members of the House of Representatives, and filed with the Secretary of State on September 5, 2018.

For the transfer of powers and duties of the department of licensing and regulatory affairs to the department of labor and economic opportunity, see E.R.O. No. 2019-3, compiled at MCL 125.1998.

See *Mothering Justice v Attorney General*, case no. 165325, July 31, 2024. The Michigan Supreme Court held that 2018 PA 369 was unconstitutional and, therefore void and revived the original initiative as enacted by the Legislature on September 5, 2018, effective February 21, 2025. Therefore, the section above is as it was enacted before being amended by 2018 PA 369.

408.972 Collective bargaining agreement.

Sec. 12. (1) If an employer's employees are covered by a collective bargaining agreement in effect on the effective date of this act and the collective bargaining agreement conflicts with this act, this act applies beginning on the stated expiration date in the collective bargaining agreement, notwithstanding any statement in the agreement that it continues in force until a future date or event or the execution of a new collective bargaining agreement.

(2) If an employer's employee is covered by a contract, not including an employer policy signed by the employee, and all of the following requirements are satisfied, this act applies beginning on the stated expiration date in the contract, notwithstanding any statement in the contract that the contract continues in force until a future date or event or the execution of a new contract:

- (a) The employer and employee signed the contract on or before December 31, 2024.
- (b) The contract is effective for not longer than 3 years.
- (c) The contract conflicts with this act.
- (d) The employer notifies the department of the contract.

(3) If a small business did not employ an employee on or before February 21, 2022, the small employer is not required to comply with this act until 3 years after the date that the employer first employs an employee.

History: 2018, Act 338, Eff. Mar. 29, 2019;—Am. 2025, Act 2, Imd. Eff. Feb. 21, 2025.

Compiler's note: Public Act 338 was proposed by initiative petition pursuant to Const. 1963, art 2, section 9. On September 5, 2018, the initiative petition was approved by an affirmative vote of the majority of the members of the Senate and an affirmative vote of the majority of the members of the House of Representatives, and filed with the Secretary of State on September 5, 2018.

For the transfer of powers and duties of the department of licensing and regulatory affairs to the department of labor and economic opportunity, see E.R.O. No. 2019-3, compiled at MCL 125.1998.

408.973 Rules.

Sec. 13. The director may promulgate rules in accordance with the administrative procedures act of 1969, 1969 PA 306, MCL 24.201 to 24.328, as necessary to administer this act.

History: 2018, Act 338, Eff. Mar. 29, 2019;—Repealed 2018, Act 369, Eff. Mar. 29, 2019;—2018, Act 338, Eff. Feb. 21, 2025.

Compiler's note: The repealed section pertained to the authority to promulgate rules.

See *Mothering Justice v Attorney General*, case no. 165325, July 31, 2024. The Michigan Supreme Court held that 2018 PA 369 was unconstitutional and, therefore void and revived the original initiative as enacted by the Legislature on September 5, 2018, effective February 21, 2025. Therefore, the section above is as it was enacted before being repealed by 2018 PA 369.

408.974 Severability.

Sec. 14. If any portion of this act or the application thereof to any person or circumstances shall be found to be invalid by a court, such invalidity shall not affect, impair, or invalidate the other portions or applications of the act that can be given effect without the invalid portion or application, and to this end the provisions of this act are declared to be severable.

History: 2018, Act 338, Eff. Mar. 29, 2019;—Am. 2018, Act 369, Eff. Mar. 29, 2019;—2018, Act 338, Eff. Feb. 21, 2025.

Compiler's note: Public Act 338 was proposed by initiative petition pursuant to Const. 1963, art 2, section 9. On September 5, 2018, the initiative petition was approved by an affirmative vote of the majority of the members of the Senate and an affirmative vote of the majority of the members of the House of Representatives, and filed with the Secretary of State on September 5, 2018.

For the transfer of powers and duties of the department of licensing and regulatory affairs to the department of labor and economic opportunity, see E.R.O. No. 2019-3, compiled at MCL 125.1998.

See *Mothering Justice v Attorney General*, case no. 165325, July 31, 2024. The Michigan Supreme Court held that 2018 PA 369 was unconstitutional and, therefore void and revived the original initiative as enacted by the Legislature on September 5, 2018, effective February 21, 2025.

February 21, 2025. Therefore, the section above is as it was enacted before being amended by 2018 PA 369.

Series 4000: District Employment

4100 Employee Rights and Responsibilities

4113 *Michigan Earned Sick Time Act (ESTA)* [Required for Districts with More Than 10 Employees] [Note: If the District has 10 or fewer employees, please contact the Thrun Board Policy Administrator to receive a different version of this ESTA policy.]

A. General

Eligible employees will accrue paid leave as provided by the ESTA. Applicable provisions of a collective bargaining agreement, individual employment contract, or handbook remain in place and may provide additional paid leave time that is not provided by the ESTA.

Unless otherwise agreed with union representation, the ESTA does not apply to employees subject to a conflicting collective bargaining agreement in effect on February 21, 2025, until the collective bargaining agreement expires.

The ESTA does not apply to an employee subject to a conflicting individual employment contract in effect on February 21, 2025, until that contract expires, if all of the following are satisfied:

- the District and the employee signed the contract on or before December 31, 2024;
- the contract is effective for not longer than 3 years; and
- the District notified the Michigan Department of Labor and Economic Opportunity (LEO) of the contract.

B. Definitions

1. “ESTA benefit year” means the 12-month period from July 1 to June 30. [Optional: may adjust 12-month period]
2. “Eligible employee” means an employee engaged in service to the District. The following, however, are not eligible employees:
 - a. an unpaid trainee or unpaid intern;
 - b. a person employed in accordance with the Michigan Youth Employment Standards Act, MCL 409.101, *et seq*; or
 - c. positions when the employee may schedule their own working hours as approved by the Superintendent or designee. For those approved positions, the District will not take adverse personnel action for failure to schedule a minimum amount of working hours.

If a collective bargaining agreement or contract meets the requirements in Section A above, then an employee covered by that contract is not an eligible employee until the contract expires.

3. "Family member" is defined as:
 - a. biological, adopted, or foster child, stepchild or legal ward, a child of a domestic partner, or a child to whom the eligible employee stands *in loco parentis*;
 - b. biological parent, foster parent, stepparent, or adoptive parent or legal guardian of an eligible employee or an eligible employee's spouse (under the laws of any state) or domestic partner or a person who stood *in loco parentis* when the eligible employee was a minor child;
 - c. an individual to whom the eligible employee is legally married under the laws of any state or a domestic partner;
 - d. grandparent, grandchild, and biological, foster, or adopted sibling;
 - e. an individual related by blood; or
 - f. an individual whose close association with the eligible employee is the equivalent of a family relationship.
4. "Earned sick time" means paid leave as allowed by the ESTA.
5. All other ESTA-defined terms apply to this Policy.

C. Wait Period and Leave Reinstatement Upon Re-Employment

A newly hired eligible employee may not use accrued earned sick time until 120 calendar days after the employee's start date, unless otherwise provided in a collective bargaining agreement, individual employment contract, employee handbook, or the ESTA.

Upon discharge or other separation from employment, an employee automatically loses accrued earned sick time unless the employee is rehired by the District within 2 months of the separation.

Accrued earned sick time that is not used before an employee's separation from employment will have no monetary value. If an employee separates from employment and is rehired by the District not more than two (2) months after separation, the District will reinstate previously accrued and unused earned sick time and allow the employee to use that earned sick time and accrue additional earned sick time upon reinstatement. This paragraph does not apply if the District paid the employee the value of the employee's unused accrued earned sick time at the time of separation.

D. ESTA Leave Accrual and Frontloading

1. Leave Accrual

Unless the District frontloads earned sick time under Section D(2), an eligible employee begins accruing earned sick time on February 21, 2025 or the employee's start date, whichever is later.

An eligible employee will accrue 1 hour of earned sick time for every 30 hours worked, but the eligible employee may only use up to 72 hours of earned sick time in a single ESTA benefit year. An FLSA-exempt eligible employee is assumed to work 40 hours per workweek unless the employee's normal workweek is less than 40 hours.

Up to 72 hours of unused accrued earned sick time will carry over from ESTA benefit year to ESTA benefit year.

2. Frontloading Leave

For each ESTA benefit year, the District may frontload earned sick time consistent with this policy, a collective bargaining agreement, or individual employment contract.

If frontloading, the District will grant a full-time eligible employee 72 hours of earned sick time at the beginning of an ESTA benefit year. For a part-time eligible employee, the District will provide the employee with:

- a written notice of how many hours the employee is expected to work during the ESTA benefit year at the time of hire;
- an amount of earned sick time at the beginning of the ESTA benefit year that is proportional to the earned sick time the employee would accrue if the employee worked all the hours in that written notice; and
- 1 hour of earned sick time for every 30 hours worked after the employee exceeds the work hours in that written notice.

Frontloaded earned sick time will not carry over from one ESTA benefit year to the next unless authorized in the applicable collective bargaining agreement, individual employment contract, or handbook.

3. Compliance Presumption

The District is in compliance with this Section D if it:

- provides an eligible employee with paid time off in at least the same amounts of time off described in the ESTA that may be

used for ESTA purposes or any other approved purpose, with the time used for an ESTA purpose being subject to the ESTA; or

- is a signatory to a collective bargaining agreement that requires contributions to a multiemployer plan under the Employee Retirement Income Security Act, subject to certain conditions.

E. Additional Absences

Additional absences, above and beyond earned sick time under the ESTA, are governed by an applicable collective bargaining agreement, individual employment contract, or Board Policy.

F. Permissible Uses

An eligible employee may use earned sick time for the following reasons:

1. the employee's mental or physical illness, injury, or health condition; medical diagnosis, care, or treatment of the employee's mental or physical illness, injury, or health condition; or preventative medical care for the employee;
2. for the employee's family member's mental or physical illness, injury, or health condition, medical diagnosis, care, or treatment of the employee's family member's mental or physical illness, injury, or health condition or preventative medical care for a family member of the employee;
3. if the employee or the employee's family member is a victim of domestic violence or sexual assault, for medical care or psychological or other counseling for physical or psychological injury or disability, to obtain services from a victim services organization, to relocate due to domestic violence or sexual assault, to obtain legal services, or to participate in any civil or criminal proceedings related to or resulting from the domestic violence or sexual assault;
4. for meetings at a child's school or place of care related to the child's health or disability, or the effects of domestic violence or sexual assault on the child; or
5. for closure of the employee's place of business by order of a public official due to a public health emergency, for an employee's need to care for a child whose school or place of care has been closed by order of a public official due to a public health emergency, or when it has been determined by the health authorities having jurisdiction or by a health care provider that the employee's or employee's family member's presence in the community would jeopardize the health of others because of the employee's or family member's exposure to a communicable disease, whether or not the employee or family member has actually contracted the communicable disease.

G. Use of Earned Sick Time

If the eligible employee's need to use leave is foreseeable, the employee must provide notice to the District of the employee's intent to use earned sick time at least 7 days prior to the date leave is to begin. If the eligible employee's need to use leave is not foreseeable, the employee must provide notice to the District of the employee's intent to use earned sick time as soon as practicable. For leave of more than 3 consecutive days, upon District request, the eligible employee must provide the District – within 15 days after the request – reasonable documentation that earned sick time was used for an ESTA purpose. The District will be responsible for paying the eligible employee's costs in obtaining the requested documentation.

In cases of domestic violence or sexual assault, reasonable documentation includes any of the following:

- a police report indicating that the employee or the employee's family member was a victim of domestic violence or sexual assault;
- a signed statement from a victim and witness advocate affirming that the employee or the employee's family member is receiving services from a victim services organization; or
- a court document indicating that the employee or the employee's family member is involved in legal action related to domestic violence or sexual assault.

All health, sexual assault, and domestic violence information and documentation received from an employee about earned sick time remains confidential and will not be disclosed, except to the employee, with the employee's written permission, or as and to the extent required by law.

Failure to comply with notice procedures or document requests to support the use of earned sick time, or using earned sick time for a non-permissible use, may result in discipline, including discharge.

Unless otherwise provided in an employee's collective bargaining agreement, individual employment contract, or handbook:

- earned sick time must be used in [] [Note: Insert "hourly" or the smallest increment that the District uses to account for absences of use of other time] increments; and
- an employee using earned sick time will not receive overtime pay, holiday pay, or bonuses for the earned sick time.

H. Notice and Recordkeeping

The District will:

1. provide an ESTA notice created by LEO to each eligible employee at hire or by March 23, 2025, whichever is later (see 4113-F);
2. display in a conspicuous location in each of its buildings the ESTA poster created by LEO; and
3. retain for not less than 3 years records documenting hours worked and earned sick time taken by eligible employees.

Legal authority: MCL 408.934b, 408.961 et seq., *Mothering Justice v Attorney General*, 2024 Mich LEXIS 1454 (July 31, 2024)

Date adopted: February 13, 2025

Date revised: March 12, 2025

Series 4000: District Employment

4100 Employee Rights and Responsibilities

4113 Michigan Earned Sick Time Act (ESTA) General

Eligible employees will accrue paid leave as provided by the ESTA. Applicable provisions of a collective bargaining agreement, individual employment contract, or handbook remain in place and may provide additional paid leave time that is not provided by the ESTA.

Unless otherwise agreed with union representation, the ESTA does not apply to employees subject to a conflicting collective bargaining agreement in effect on February 21, 2025, until the collective bargaining agreement expires.

The ESTA does not apply to an employee subject to a conflicting individual employment contract in effect on February 21, 2025, until that contract expires, if all of the following are satisfied:

- the District and the employee signed the contract on or before December 31, 2024;
- the contract is effective for not longer than 3 years; and
- the District notified the Michigan Department of Labor and Economic Opportunity (LEO) of the contract.

A. Definitions

1. "ESTA benefit year" means the 12-month period from July 1 to June 30.
2. "Eligible employee" means an employee engaged in service to the District. The following, however, are not eligible employees:
 - a. an unpaid trainee or unpaid intern;
 - b. a person employed in accordance with the Michigan Youth Employment Standards Act, MCL 409.101, *et seq*; or
 - c. positions when the employee may schedule their own working hours as approved by the Superintendent or designee. For those approved positions, the District will not take adverse personnel action for failure to schedule a minimum amount of working hours.

If a collective bargaining agreement or contract meets the requirements in Section A above, then an employee covered by that contract is not an eligible employee until the contract expires.

3. "Family member" is defined as:

- a. biological, adopted, or foster child, stepchild or legal ward, a child of a domestic partner, or a child to whom the eligible employee stands *in loco parentis*;
 - b. biological parent, foster parent, stepparent, or adoptive parent or legal guardian of an eligible employee or an eligible employee's spouse (under the laws of any state) or domestic partner or a person who stood *in loco parentis* when the eligible employee was a minor child;
 - c. an individual to whom the eligible employee is legally married under the laws of any state or a domestic partner;
 - d. grandparent, grandchild, and biological, foster, or adopted sibling;
 - e. an individual related by blood; or
 - f. an individual whose close association with the eligible employee is the equivalent of a family relationship.
4. "Earned sick time" means paid leave as allowed by the ESTA.
 5. All other ESTA-defined terms apply to this Policy.

B. Wait Period and Leave Reinstatement Upon Re-Employment

A newly hired eligible employee may not use accrued earned sick time until 120 calendar days after the employee's start date, unless otherwise provided in a collective bargaining agreement, individual employment contract, employee handbook, or the ESTA.

Upon discharge or other separation from employment, an employee automatically loses accrued earned sick time unless the employee is rehired by the District within 2 months of the separation.

Accrued earned sick time that is not used before an employee's separation from employment will have no monetary value. If an employee separates from employment and is rehired by the District not more than two (2) months after separation, the District will reinstate previously accrued and unused earned sick time and allow the employee to use that earned sick time and accrue additional earned sick time upon reinstatement. This paragraph does not apply if the District paid the employee the value of the employee's unused accrued earned sick time at the time of separation.

C. ESTA Leave Accrual and Frontloading

1. Leave Accrual

Unless the District frontloads earned sick time under Section D(2), an eligible employee begins accruing earned sick time on February 21, 2025 or the employee's start date, whichever is later.

An eligible employee will accrue 1 hour of earned sick time for every 30 hours worked, but the eligible employee may only use up to 72 hours of earned sick time in a single ESTA benefit year. An FLSA-exempt eligible employee is assumed to work 40 hours per workweek unless the employee's normal workweek is less than 40 hours.

Up to 72 hours of unused accrued earned sick time will carry over from ESTA benefit year to ESTA benefit year.

2. Frontloading Leave

For each ESTA benefit year, the District may frontload earned sick time consistent with this policy, a collective bargaining agreement, or individual employment contract.

If frontloading, the District will grant a full-time eligible employee 72 hours of earned sick time at the beginning of an ESTA benefit year. For a part-time eligible employee, the District will provide the employee with:

- a written notice of how many hours the employee is expected to work during the ESTA benefit year at the time of hire;
- an amount of earned sick time at the beginning of the ESTA benefit year that is proportional to the earned sick time the employee would accrue if the employee worked all the hours in that written notice; and
- 1 hour of earned sick time for every 30 hours worked after the employee exceeds the work hours in that written notice.

Frontloaded earned sick time will not carry over from one ESTA benefit year to the next unless authorized in the applicable collective bargaining agreement, individual employment contract, or handbook.

3. Compliance Presumption

The District is in compliance with this Section D if it:

- provides an eligible employee with paid time off in at least the same amounts of time off described in the ESTA that may be used for ESTA purposes or any other approved purpose, with the time used for an ESTA purpose being subject to the ESTA; or
- is a signatory to a collective bargaining agreement that requires contributions to a multiemployer plan under the Employee Retirement Income Security Act, subject to certain conditions.

D. Additional Absences

Additional absences, above and beyond earned sick time under the ESTA, are governed by an applicable collective bargaining agreement, individual employment contract, or Board Policy.

E. Permissible Uses

An eligible employee may use earned sick time for the following reasons:

1. the employee's mental or physical illness, injury, or health condition; medical diagnosis, care, or treatment of the employee's mental or physical illness, injury, or health condition; or preventative medical care for the employee;
2. for the employee's family member's mental or physical illness, injury, or health condition, medical diagnosis, care, or treatment of the employee's family member's mental or physical illness, injury, or health condition or preventative medical care for a family member of the employee;
3. if the employee or the employee's family member is a victim of domestic violence or sexual assault, for medical care or psychological or other counseling for physical or psychological injury or disability, to obtain services from a victim services organization, to relocate due to domestic violence or sexual assault, to obtain legal services, or to participate in any civil or criminal proceedings related to or resulting from the domestic violence or sexual assault;
4. for meetings at a child's school or place of care related to the child's health or disability, or the effects of domestic violence or sexual assault on the child; or
5. for closure of the employee's place of business by order of a public official due to a public health emergency, for an employee's need to care for a child whose school or place of care has been closed by order of a public official due to a public health emergency, or when it has been determined by the health authorities having jurisdiction or by a health care provider that the employee's or employee's family member's presence in the community would jeopardize the health of others because of the employee's or family member's exposure to a communicable disease, whether or not the employee or family member has actually contracted the communicable disease.

F. Use of Earned Sick Time

If the eligible employee's need to use leave is foreseeable, the employee must provide notice to the District of the employee's intent to use earned sick time at least 7 days prior to the date leave is to begin. If the eligible employee's need to use leave is not foreseeable, the employee must provide notice to the District of the employee's intent to use earned sick time as soon as practicable. For leave of more than 3 consecutive days, upon District request, the eligible employee must provide the District – within 15 days after the request – reasonable

documentation that earned sick time was used for an ESTA purpose. The District will be responsible for paying the eligible employee's costs in obtaining the requested documentation.

In cases of domestic violence or sexual assault, reasonable documentation includes any of the following:

- a police report indicating that the employee or the employee's family member was a victim of domestic violence or sexual assault;
- a signed statement from a victim and witness advocate affirming that the employee or the employee's family member is receiving services from a victim services organization; or
- a court document indicating that the employee or the employee's family member is involved in legal action related to domestic violence or sexual assault.

All health, sexual assault, and domestic violence information and documentation received from an employee about earned sick time remains confidential and will not be disclosed, except to the employee, with the employee's written permission, or as and to the extent required by law.

Failure to comply with notice procedures or document requests to support the use of earned sick time, or using earned sick time for a non-permissible use, may result in discipline, including discharge.

Unless otherwise provided in an employee's collective bargaining agreement, individual employment contract, or handbook:

- earned sick time must be used in 15-minute increments; and
- an employee using earned sick time will not receive overtime pay, holiday pay, or bonuses for the earned sick time.

G. Notice and Recordkeeping

The District will:

1. provide an ESTA notice created by LEO to each eligible employee at hire or by March 23, 2025, whichever is later (see 4113-F);
2. display in a conspicuous location in each of its buildings the ESTA poster created by LEO; and
3. retain for not less than 3 years records documenting hours worked and earned sick time taken by eligible employees.

Legal authority: MCL 408.934b, 408.961 et seq., *Mothering Justice v Attorney General*, 2024 Mich LEXIS 1454 (July 31, 2024)

Date adopted: February 13, 2025

Date revised: March 12, 2025

B. Approve 24-25 Special Education
Budget Amendment as presented.

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SPECIAL EDUCATION
Fiscal Year Ending June 30, 2025
3/12/2025

Proposed Amended Budget

LOCAL REVENUE	3,715,583
STATE REVENUE	3,528,286
FEDERAL REVENUE	2,768,354
LEA	912,672
OTHER	-
TOTAL REVENUES	10,924,895

EXPENSES by FUNCTION

	122	2,524,747	Special Education
	212	127,233	Early On
	213	769,447	Health Services
	214	317,985	Psychological Services
	215	1,200,297	Speech Pathology and Audiology
	216	292,416	Social Worker
	217	25,000	Visual Aid
	218	6,212	Teacher Consultatant Special Education
	221	4,025	Improvement of Instruction
	226	620,397	Supervision of Instructional Staff
	232,231,252	155,146	Executive Fiscal
	241	206,240	Office of the Principal
	249	1,000	Graduation
	259	10,069	Other Business
	261	292,184	Operations Building Services
	271	1,028,744	Transportation
	281	160,640	Planning Research
	284	18,522	Technology
	299	1,695	Staff Appreciation
	371	30,000	Non Public Schools Prop Share
	411	2,249,247	Payments to LEAs
	441	45,627	Payments to Governmental Agencies
	456	340,000	Buidling Improvements
	TOTAL EXPENSES	10,426,874	

Total Revenues	10,924,895
Total Expenses	10,426,874
Revenue over Expenses	498,021

Fund Balance July 1, 2024	3,429,460
Fund Balance June 30, 2025	3,927,481

SPECIAL ED
 Fiscal Year Ending June 30, 2025
 Proposed Amended Budget March 12, 2025

	AUDITED 23-24	ORIGINAL 24-25	AMENDED 24-25	
	3,733,720	3,828,604	3,715,583	LOCAL REVENUE
	3,870,129	3,252,273	3,528,286	STATE REVENUE
	3,489,618	3,060,437	2,768,354	FEDERAL REVENUE
	755,153	722,284	912,672	LEA
	2,500	-	-	OTHER
TOTAL REVENUES	11,851,120	10,863,598	10,924,895	
	2,234,628	2,504,629	2,524,747	Special Education
		323,543	127,233	Early On
		789,017	769,447	Health Services
		324,700	317,985	Psychological Services
	4,839,352	1,032,942	1,200,297	Speech Pathology and Audiology
		335,086	292,416	Social Worker
		15,000	25,000	Visual Aid
		-	6,212	Teacher Consultatant Special Education
		9,907	4,025	Improvement of Instruction
		530,981	620,397	Supervision of Instructional Staff
	423,090	146,570	155,146	Executive Fiscal
		210,088	206,240	Office of the Principal
		1,000	1,000	Graduation
		13,058	10,069	Other Business
		293,746	292,184	Operations Building Services
		1,162,719	1,028,744	Transportation
	40,293	160,803	160,640	Planning Research
		14,933	18,522	Technology
		500	1,695	Staff Appreciation
		30,000	30,000	Non Public Schools Prop Share
	2,422,734	2,667,060	2,249,247	Payments to LEAs
		48,600	45,627	Payments to Governmental Agencies
		52,500	340,000	Buidling Improvements
TOTAL EXPENSES	9,960,097	10,667,381	10,426,874	
	1,891,023	196,217	498,021	REVENUES OVER EXPENSES
	1,538,437	3,429,460	3,429,460	FUND BALANCE Beginning of Year
	3,429,460	3,625,677	3,927,481	FUND BALANCE End of Year

C. Approve a contract with SchoolsOPEN, LLC in the amount of \$5,850 with a conversion fee of \$15,400 for a total of \$21,250.

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C.O.O.R. ISD Finance / HR/ Payroll			
February 26, 2025 -- Prices valid for 60 days			
Annual Subscription			Individual District
	Students	Annual Subscription	* \$3,600/yr minimum
Roscommon Area Public Schools	807	\$15	12,105
Houghton Lake Community Schools	1165	\$15	17,475
Mio-Ausable Schools	488	\$15	7,320
Fairview Area School District	303	\$15	4,545
West Branch-Rose City Area Schools	1841	\$15	27,615
	Employees		
C.O.O.R. Intermediate School District	117	\$50	5,850
Total, Annual Subscription			\$74,910
Infrastructure & Provisioning			Individual District
	Students		One-Time Cost
Roscommon Area Public Schools	807		
Houghton Lake Community Schools	1165		
Mio-Ausable Schools	488		
Fairview Area School District	303		
West Branch-Rose City Area Schools	1841		
	Employees		
C.O.O.R. Intermediate School District	117		
Total, Infrastructure & Provisioning			\$6,000
Migration from Current Provider			Individual District
	Students		One-Time Cost
Roscommon Area Public Schools	807		7,200
Houghton Lake Community Schools	1165		7,200
Mio-Ausable Schools	488		5,400
Fairview Area School District	303		5,400
West Branch-Rose City Area Schools	1841		7,200
	Employees		
C.O.O.R. Intermediate School District	117		7,200
Total, Migration from Current Provider			\$39,600

Keep in mind that Application Instruction is one of the most difficult items to specify. There are two goals which are at odds with each other: a) Adequate and proper training, and b) Cost. With that in mind, the schedule below shows what an individual district would require if it were to be performed in isolation. Any SchoolsOPEN instruction fees are based on instructor time, not the number of participants.

Application Instruction			Individual District	
	Students	All Instruction figures are estimates based on experience with districts of similar size.	Finance	HR/Payroll
Roscommon Area Public Schools	807			3,600
Houghton Lake Community Schools	1165		3,600	3,600
Mio-Ausable Schools	488		2,400	3,000
Fairview Area School District	303		2,400	3,000
West Branch-Rose City Area Schools	1841	These are budget figures and can vary due to timing & individual ability.	3,600	3,600
	Employees			
C.O.O.R. Intermediate School District	117		3,600	3,600
Total, Application Instruction			\$19,200	\$20,400

Financial System and Human Resources

Proposal Presented to

*C.O.O.R. Intermediate School District
Roscommon Area Public Schools
Houghton Lake Community Schools
Mio-Ausable Schools
Fairview Area School District
West Branch-Rose City Area Schools*

Presented By:





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Overview

We are pleased to present you with our sales quotation for the adoption of SchoolsOPEN ERP system for your public school district. SchoolsOPEN is the best choice for small to medium sized K12 districts in the state of Michigan, as we offer a comprehensive and affordable solution that meets your specific needs and challenges.

SchoolsOPEN is not just a vendor, but a partner who understands the education sector and its complexities. We design our own fully integrated finance, HR, and payroll applications. Our ERP system is flexible, scalable, and secure, and can be customized to fit your district's policies and procedures.

SchoolsOPEN has been in operation for almost 30 years, serving Michigan public schools for that entire time. We have a proven track record of successful implementations, high customer satisfaction, and continuous innovation. Our team of experts will provide you with the best support and training throughout the project lifecycle and beyond.

We hope that you will find our quotation satisfactory and look forward to hearing from you soon. Please do not hesitate to contact us if you have any questions or concerns.

Technology

SchoolsOPEN provides a specialized application and database server environment that meets the demands of today's web-based user environment. Application reliability, database security, and nightly backups ensure that adopting districts have access to their systems whenever they need them.

Offsite hosting is provided using SchoolsOPEN servers that are exclusively used for Finance/HR/Payroll users. These systems are constantly supervised, use resilient and high availability components, and are fully backed up every night.

Solution

After performing an analysis of your requirements, SchoolsOPEN has identified a valuable solution for the C.O.O.R. Intermediate School District. SchoolsOPEN provides school districts with a collection of completely integrated financial accounting, human resource, and payroll modules that implement a complete business management system for K-12 Public, Charter, and Private Schools.



Key Features of SchoolsOPEN

Security

- Customize and restrict user access based on specific criteria, such as funds or accounts.
- Grant view-only access to users who do not need to edit or modify data.
- Users are able to login to multiple districts, if needed.
- Generate role-based user security summary reports to help you manage your users effectively.
- View and edit user permissions in the system at any time. The list of individual permissions amount to the number of programs and options within, resulting in many thousands of individual permissions – More than enough to customize the experience for each individual using SchoolsOPEN.

Finance

- General Ledger module that meets the standards of Michigan 1022 and GASB-34.
- Specialized modules for different functions with high performance and quality.
- Real-time data access and updates for all departments and locations in the district.
- Follows the rules and guidelines of Bulletin 1022, GASB-34 and Handbook 2R2 from the state and federal education authorities.
- Online access to multiple years of data, including transactions, purchase orders and budgets. It also handles account number changes across years without losing history.
- Validates all transactions before saving them, ensuring data accuracy and consistency.
- Control and track user access and permissions for data and programs within the system.
- Distributed Purchasing module that enables departmental and building requisitions, PO creation, receiving and payment.
- Purchase authorization based on user roles and permissions.

Financial Reporting

- Range of financial reports, from basic to summary to detailed, that can be accessed and viewed.



- Flexible report customization and design feature that allows users to modify standard reports or create their own reports.
- Every report provides one-button export that supports various software applications, such as pdf, Excel, etc.
- Reports kept up to date with local, state and federal reporting.
- Historical data analysis features that enable users to run reports with data from previous years.
- Data storage capacity that supports unlimited years of historical data.
- Budget forecasting tool that allows users to project a budget plan for staffing, revenue and expenditures.

School Based Operations

- Easily process checks and record cash receipts at the building level.
- Access and report on all building level activity & balances at any time.
- Automatically process electronic 1099's.
- View and print options for remote sites.

Budget

- Forecast your budgets for the following year.
- Merge projections from different departments into one document.
- Track your budgets, expenditures and revenues across multiple years.
- Store an unlimited series of budget versions in the system for comparison and analysis.

General Ledger

- Manage multiple funds.
- Customize your chart of accounts to suit your specific needs.
- Separate your building level activity accounts from your district accounts for clarity and control.
- View your account balances instantly as you enter journal entries.

Cash Receipts

- Duplicate recurring receipts with one click.
- Set your own starting point for receipt numbers and let the system increment them automatically.



- Accept credit card payments from your customers through a direct interface with your preferred company.

School Based Activity Accounting

- Integrate seamlessly with the District's Financial System, no need for a separate system.
- Create custom entities within your district for different schools or programs.
- Filter vendors by entity to see only the ones you use.
- Restrict staff access to their own accounts only for security and privacy.
- Support for an unlimited number of Bank Accounts which maintain separate cash balances for each fund.
- Custom check logos and electronic signatures for faster and easier payments.
- Print checks and receipts on demand as needed.
- Duplicate (clone) check requests that you use regularly with one click.
- Save your accounting update reports automatically and print them whenever you want.
- Generate checks for fee management refunds easily and quickly.
- Approve and record check issuance with a simple process to ensure accountability and transparency.
- Fill in check requests automatically with vendor, amounts, and account numbers to save time and avoid errors.

Purchasing

- Create and approve requisitions & purchase orders online with multiple approval levels throughout the district.
- Manage your budget with encumbrance tracking on General Ledger reports.
- Send purchase orders and payments to vendors online after all approvals are done.
- Document receipts online.
- Integrated with Accounts Payable and General Ledger.

Accounts Payable

- Input and store documents online.
- Pay disbursements by ACH/EFT and send electronic vouchers to vendors.
- Import Purchase Card data online.
- Generate expense reimbursements online for staff.
- Sign checks electronically.
- Edit 1099 forms online.



Accounts Receivable/Billing

- Generate invoices that interface with General Ledger.
- Store invoices online.
- Send invoices to vendors automatically via email.
- Track payments, aging reports, batch payments, invoice printing.
- Interface with bank lockbox and web import as a custom process.
- Easily create recurring invoices.

Human Resources and Payroll

- Maintain records of current and former employees and contractors
- Track all payroll data such as salaries, deductions, taxes, and retirement
- Produce Michigan ORS file directly from Payroll
- Simplified payroll process with one click.
- Handle multiple pay rates for various positions, such as teachers, coaches, and merit pay.
- Administer 21 & 26 pay teachers with summer accrued salaries and associated employer expenses.
- Process employee reimbursements using either Payroll or Accounts Payable.
- Communicate with third parties for EPARS, ACH, ORS.
- Connect smoothly with Red Rover, Frontline, Aesop, and Tracy Time.
- Attach documents to employee records for I9's, W4's, and other district records.

Payroll Processing

- Electronic time entry for employees with an Internet connection. Choose from different process and hardware options for electronic time cards.
- Electronic leave management with multi-level approvals and attendance recording. View your time used and balances available for different types of leave.
- Family Medical Leave tracking and reporting for individual employees. Save time and automate the process of complying with FMLA regulations.
- Timekeeping system with electronic approvals and payroll integration -- Streamline your payroll process and reduce errors.
- Automatic signature for payroll checks.
- Electronic direct deposit vouchers. Employee self-service provides access to vouchers securely through the Internet.



- State and Federal reports generation. Easily produce 941, W2, unemployment, state retirement and other reports.
- Electronic payroll reports storage. Create and store digital copies of your payroll reports for each pay period.
- Audit trail for employee information changes. Track who, when and what changes were made to the employee records.
- Direct Deposit notices e-mailing and archiving. Employees receive and access pay notices as PDFs through e-mail or online.

Employee Self Service

EmployeeWeb provides online access from any Internet connected computer. Employees can access their own HR and payroll records, including:

- Accruals
- Earnings (Calendar year & Fiscal year)
- Taxes
- Deductions
- Dependents
- Direct Deposit
- Insurances & other benefits
- PD (electronic ties to Secure Central Registry)
- Attendance
- Time off request system allows fast and easy submission and approval.

Employee Information Control

- Manage employee personal and job data in one central application
- Streamlined process for application, payroll, and salary negotiation with single entry
- Track employee professional development with electronic entry
- Conduct drug testing as needed
- Monitor permits and certifications with email reminders
- Access health, workers comp, unemployment, and FMLA information securely
- Store personnel files electronically and comply with Michigan document retention & privacy laws
- Record position changes with dates and pay rates
- Allow employees to update demographic information at your discretion
- Approved changes automatically update appropriate area and eliminate redundant data entry



Employee Attendance

- Electronic employee absence requests, approvals and reporting with unlimited levels of approval based on employee group and absence type.
- Ability to limit absence types by employee groups and employee balances.
- Ability to run reports on absences by employee and date.
- Seamlessly connected to electronic payroll time sheets.

File Storage and Retrieval

- Nearly all modules provide the capability of attaching related documents to transaction and employee records.
- Electronic storage of documents that meets the State of Michigan record retention standards
- Web browser access allow staff to review invoices and payments
- Customizable access restrictions for different documents and staff members
- Document retrieval for viewing, email, and printing
- Direct and consecutive filing of documents without scanning, saving, or attaching

Note: SchoolsOPEN Document Attachment is not intended as a general purpose document management tool. i.e. Student records or other documents are not intended for management using this solution.

General Technical Questions

SchoolsOPEN provides a system and architecture that almost eliminates the traditional need for internal technical support, server hardware, and backup systems.

Data Backup

- SchoolsOPEN makes a complete snapshot of your database every evening. Each snapshot becomes one of a rotating set of backups that includes a backup for each day of the last week, then one more for each of the five preceding weeks.
- All snapshots are sent to a secure, onsite data vault that maintains up to 4 months of snapshots.
- Encrypted copies of each snapshot are also replicated to a secure, private off-site data vault that mirrors the 5 days + 5 weeks backups.
- Additionally, your live database is replicated in near-real-time to a fail-over, hot standby database server (up to date within 1-3 seconds after each change is completed).



Server Requirements

SchoolsOPEN products are available under the Software as a Service (SaaS) model. Highlights of the SchoolsOPEN SaaS model are:

- Access to applications without the need to own or operate your own servers
- SchoolsOPEN takes care of the server maintenance and upgrades for hassle-free system management
- Reliable and secure infrastructure using private, dedicated servers with high availability and resilience features
- SchoolsOPEN SaaS uses a scalable architecture such that there are no restrictions on number of users or volume of individual district databases.
- Each district is allocated their own separate, private, database and instance of the application to ensure the greatest levels of security and availability.
- Full data backup every night
- End user management is performed by each district with a variety of tools for both individual and batch configuration.

* Active Directory is not an option at this time.

Client Requirements

Client access is provided using the most recent "general release" version of Google's Chrome Web Browser.

- Most recent versions of Mozilla Firefox and Microsoft Edge will work as well.
- Browser issues and problem resolution is confirmed based on functionality provided by the Chrome browser, a.k.a. the "reference browser".
- Clients are expected to have a high speed, reliable, internet connection. Access to SchoolsOPEN is provided via HTTPS (SSL) connections using port 443.
- No other applications (FTP, Telnet, etc.) or special access (VPN's) are required.

Update Schedule

- Scheduled updates are performed as updates are published from State & Federal agencies. E.g. ORS Retirement Rates before Oct. 1, Withholding tables prior to Jan. 1.
- Periodic enhancements are automatically installed during non-peak hours using process that requires no end-user downtime.
- Urgent "bug fixes" can be provided to individual districts based on availability using our "no downtime" update process.
- A complete history of Release Notes are available to all users via an online link directly within the application.



Planned Downtime

- There is a 15-minute window from 1:00am to 1:15am each night during which the system may not be available.
- Users are counseled to avoid using the system during this window.

Application Data Migration

Application database migration is the process of transferring data from one database management system (DBMS) to SchoolsOPEN native structure and format. Depending on the complexity and compatibility of the source and target DBMS, the migration can involve different steps and methods, such as exporting and importing data, using data transformation tools, or writing custom scripts.

Application database migration can be challenging and risky, as it may affect the functionality, security, and integrity of the data. Therefore, it is important to plan carefully, test thoroughly, and monitor closely the migration process.

Application Instruction and Education

As part of our application software instruction and education services, we offer the following:

- Initial and ongoing instruction is provided according to the needs and desires of your schools. SchoolsOPEN will work with you to establish a mix of "train-the-trainer" as well as "vendor direct" instruction. Either way, you only pay for the services you use.
- Courses tailored to your specific needs and goals, delivered by experienced instructors who are experts in the SchoolsOPEN software domain.
- Hands-on exercises and practical examples that reinforce the learning outcomes and help you apply the software skills in your own district.
- Any online course materials, recordings, quizzes and feedback will be made available to you at no additional cost.



- A dedicated support team to assist you throughout your learning journey.
- A certificate of completion that validates your proficiency in the software and enhances your professional credentials.

Application Maintenance and Product Support

SchoolsOPEN has partnered with Best in Class education leader: Genesee Intermediate School District (GISD) to provide a combined comprehensive support model. Utilizing a multi-channel communication system, your district has access to our extensive support solution between the hours of 8:00 am to 4:30 pm EST, Monday through Friday, excluding religious and/or nationally observed holidays.

- The support team provides assistance to your designated Point-of-Contact(s). These are typically key individuals in the central office or district-focused positions.
- Email, phone, text messages are all accepted – You determine how to best make that initial contact.
- As a mission critical support provider, we understand that time is of the essence. Each incident is prioritized and responded to as soon as practical. Initial response time is often within minutes or at most a few hours.
- Periodic (usually quarterly) User Group Meetings are hosted by GISD. These sessions focus on new features, seasonal topics, and user requested highlights.



Implementation Timeline

C.O.O.R. Intermediate School District and SchoolsOPEN will work closely during the implementation process. This process will begin upon receipt of the purchase order. Please keep in mind that all dates are contingent upon receipt of the purchase order, the needs of the school district, and SchoolsOPEN Operations schedules.

The projected timeline for a conversion project would be similar to the following:

Implementation Phases		
Purchase Order Received		
Implementation Planning Meeting		
Client Provisioning and Database Setup		
	Enrollment 0-499	Enrollment 500-1,999
Migration of Finance data	2-3 days	3-4 days
Finance Audit	.5 days	
Finance System Live		
Instruction on operation and use of system <ul style="list-style-type: none"> Many aspects of training can be grouped together, but each individual District should commit to some number of days for personal attention. 	2-3 days	3-4 days
Migration of HR & Payroll data	2.5-3.5 days	3-4 days
Attendance Accruals & Events Audit	.5 days	
Payroll Audit	.5 days	
Instruction on operation and use of system <ul style="list-style-type: none"> Many aspects of training can be grouped together, but each individual District should commit to some number of days for personal attention. 	3-6 days	4-8 days



SchoolsOPEN or one of its designated partners will:

- Set up the hosted environment including a custom domain name, isolated database storage, and separate application space for each district
- Provide all server software and software maintenance to include product updates
- Provide Tier 1 Support Services to the District via e-mail Monday to Friday 8:00 am – 4:00 pm (EST)



SchoolsOPEN Fee Schedule¹

<p>Infrastructure Provisioning</p> <p>Configure SchoolsOPEN Base Application Service(s); Up to 5 hours (per tier) of dedicated, "back office" technical support to work with the Implementation group; Additional service hours billed at \$150/hr;</p>	<p>One-time, Per-District</p>
<p>Migration Services</p> <p>Export & Import assistance from existing financial, HR, and payroll system. Ideally a finance conversion would comprise at least the current year plus most recent 3 fiscal years; HR is typically "everything we can get"; and, Payroll would contain per-payroll detail for a minimum of the most recent fiscal & calendar year.</p>	<p>\$1,200/day \$150/hr</p>
<p>Application Instruction</p> <p>"Budget" (right) is what we suggest for a single district similar in size to your participants.</p> <ul style="list-style-type: none"> • Costs can be shared amongst all participating districts. Not all situations lend themselves to group training. • On-site • Zoom, Webex, etc. • SchoolsOPEN or partner location • Only pay for days used 	<p>\$1,200/day \$150/hr</p> <p>Finance Budget 2-4 days</p> <p>HR/Payroll Budget 4-6 days</p>
<p>Annual Subscription</p> <ul style="list-style-type: none"> • SchoolsOPEN Finance • SchoolsOPEN HR/Payroll • Fee based on student enrollment for LEA's • Fee based on employees for ISD's, ESA's, etc. 	<p>List Prices. Refer to attached schedule for COOR ISD prices.</p> <p>\$15/student \$50/employee</p>

¹ See attached schedule for actual amounts and details, including discounts and incentives



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ADDENDUM:

COOR ISD Detail Pricing Worksheet

Separate attachment

References

Marquette-Alger Regional Educational Service Area
Chris Valima, Business Manager
cvalima@maresa.org, (906) 362-1131

Adrian Public Schools
Lisa Cunningham, Payroll Supervisor
lcunningham@adrian.k12.mi.us, 517-264-6654

Feel free to contact SchoolsOPEN for additional references.



All investment information is valid for 60 days from the date of the proposal.

C.O.O.R. Intermediate
School District

SchoolsOPEN, LLC
6276 Jackson Rd
Ann Arbor, MI 48103

By: _____

By: *Richard S Havourd III*

Printed Name: _____

Printed Name: Richard S Havourd III

Its: _____

Its: Vice President

Date: _____

Date: 02/26/2025

D. Accept bid proposals provided by
Integrity Construction for the COOR
Educational Center renovation
SUBTOTAL

93

	\$2,602,543.00
Contingency (15%)	
	\$ 390,381.00
Estimated General Conditions	
	\$65,250.00
- Add for Slab Saw cutting (Allowance)	\$10,000.00
Construction Manager Fee	
	\$ 260,000.00
TOTAL	
	\$3,328,174.00

Architect:
Kingscott
950 Trade Center Way
Suite 130
Portage, MI 49002

Construction Manager:
Integrity Construction Services, LLC.
829 W. Main Ave. Suite C
Gaylord, MI 49735

**C.O.O.R. ISD Education Center Remodel
BID TABULATION
Gaylord, MI 49735**

Bid Date: February 27, 2025

Bid Package #1 - Asbestos Abatement	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
Midstate Asbestos Removal	\$ 49,000.00	x	x	x	x	x					
Pinnacle Abatement	\$ 48,957.00	x	x	x	x	x	x	Cashiers Check			\$ 48,957.00
Quality Environmental	\$ 56,000.00	x	x	x	x	x	x				
Bid Package #2 - Sitework	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
Porath Excavating	\$ 47,700.00	x	x	x	x	x	x				\$ 47,700.00
Bid Package #3 - Concrete	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
Schepers Concrete	\$ 102,782.00	x	x	x	x	x	x				\$ 102,782.00
Graham Construction	\$ 234,700.00	x	x	x	x	x	x				
Bid Package #4 - Masonry	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
Straus Masonry	\$ 93,966.00	x	x	x	x	x	x				\$ 93,966.00
Bay Masonry	\$ 95,600.00	x	x	x	x	x	x				

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Bid Package #5 - Steel	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
Northwoods Products Valley	\$ 28,725.00		x	x	x	x	x	Add 4 bollards + \$1,700.00			\$ 30,425.00
	\$ 87,390.00	x	x	x	x	x	x				
Bid Package #6 - Cabinetry and Countertops	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
Cedar Valley Cabinet	\$ 55,715.00		x	x	x	x	x	Late Bid			\$ 55,715.00
Bid Package #7 - General Trades	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
Hardwood Hills Construction	\$ 388,728.00	x	x	x	x	x	x	Add dock bumpers +\$1,495.00			\$ 390,223.00
Graham Construction	\$ 655,700.00	x	x	x	x	x	x				
Bid Package #8 - Roofing (Already Under Contract)	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
Great Lakes Roofing and Coating	\$ 6,557.00										\$ 6,557.00
Bid Package #9 - Joint Sealants	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
Great lakes Caulking	\$ 28,000.00	x	x	x	x	x	x	Cashiers Check, -\$4000 if also awarded #15			\$ 24,000.00

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Bid Package #10 - Doors, Frames and Hardware - Supply Only	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
Earls Building Supply	\$ 184,150.00	x	x	x	x	x	x	Cashiers Check, -9,150 to use Corbin Russwin			
Allen Supply	\$ 107,636.00		x	x	x	x	x				\$ 107,636.00
Bid Package #11 - Aluminum Framing, Entrances and Glazing	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
Northern Michigan Glass	\$ 432,230.00	x	x	x	x	x	x				\$ 432,230.00
Bid Package #12 - Metal Stud Framing, Ins, Gypboard and SAT Ceilings	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
Metal Arts	\$ 291,250.00	x	x	x	x	x	x				
Ritsema	\$ 253,500.00	x	x	x	x	x	x				\$ 253,500.00
Bid Package #13 - Painting and Wall Coverings	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
Paramount Painting	\$ 112,689.00	x	x	x	x	x	x	Cashiers Check			
Murray Painting	\$ 139,740.00	x	x	x	x	x	x	CBD - 6500 if also awarded #15			
Hock Painting	\$ 71,226.00	x	x	x	x	x	x	Add \$2,318 for missed area of Vapor Barrier			\$ 73,544.00
Vork Brothers	\$ 89,980.00	x	x	x	x	x	x				
Bid Package #14 - Floor Coverings and Wall tile	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
World of Floors	\$ 128,266.00	x	x	x	x	x	x				
Ritsema	\$ 105,320.00	x	x	x	x	x	x				\$ 105,320.00

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Bid Package #15 - Resinous Epoxy Flooring	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
Elite Coatings	\$ 24,703.00	x	x	x	x	x	x				
World of Floors	\$ 36,137.00	x	x	x	x	x	x				
Great Lakes Cauk	\$ 17,800.00	x	x	x	x	x	x	Also bid #9, - 4000 if awarded both			\$ 17,800.00
Murray	\$ 72,508.00	x	x	x	x	x	x	Also Bid #13 CBD - 6500 if awarded both			
Bid Package #16 - Interior Signage	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
Signplicity	\$ 28,650.89	x	x	x	x	x					
Graph X	\$ 5,373.66	x	x	x	x			Check - Revised Bid \$23,729			
Blink Marketing	\$ 9,167.45	x	x	x	x			Revised Bid \$21278			\$ 21,278.00
Bid Package #17 - Food Service Equipment	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
Stafford Smith	\$ 49,689.00	x	x	x	x	x					
Great Lakes West	\$ 41,410.00	x	x	x	x	x	x				\$ 41,410.00
Bid Package #18 - Plumbing	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
JE Johnson	\$ 172,000.00	x	x	x	x	x	x				\$ 172,000.00
Johnson & Woods	\$ 399,000.00	x	x	x	x	x	x	Also bid #19, CBD - 20,000 if awarded both			
Bid Package #19 - HVAC	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
JE Johnson	\$ 282,000.00	x	x	x	x	x	x				\$ 282,000.00
Johnson & Woods	\$ 380,000.00	x	x	x	x	x	x				

Architect:
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Construction Manager:
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Bid Package #20 - Electrical and Fire Alarm	Base Bid	Bid Security	Familial Relationship	Iran Econ. Act	Addendum #1	Addendum #2	Addendum #3	Notes	% O&P Additional Work	% O&P Deleted Work	Complete and Qualified Bidder
Blanchard Electric	\$ 381,740.00	x	x	x	x	x	x				
Nighthawk Electric	\$ 323,200.00	x	x	x	x	x	x				
Master Electric	\$ 295,500.00	x	x	x	x	x	x				\$ 295,500.00
SUBTOTAL											\$ 2,602,543.00
15% Contingency											\$ 390,381.00
Access Control Bid	\$ 28,846.00										\$ 28,846.00
Estimated General Conditions								Added Slab on Grade Sawcutting			\$ 75,250.00
Construction Management Fee											\$ 260,000.00
TOTAL											\$ 3,357,020.00

Notes:

March 10, 2025
Contractor Recommendations
C.O.O.R. ISD Education Center Remodel

Bid Package #1 – Asbestos Abatement Pinnacle Abatement – Gaylord, MI	#1	\$48,957
Bid Package #2 – Sitework Porath Excavating – Houghton Lake, MI	#2	\$47,700
Bid Package #3 – Concrete Schepers Concrete – Grand Rapids, MI	#3	\$102,782
Bid Package #4 – Masonry Straus Masonry – Weidman, MI	#4	\$93,966
Bid Package #5 – Steel Northwoods Products – Brethren, MI - Add four bollards	#5	\$28,725 \$1,700
Bid Package #6 – Cabinetry and Countertops Cedar Valley Cabinet – Manton, MI	#6	\$55,715
Bid Package #7 –General Trades Hardwood Hills – Gladwin, MI - Add dock bumpers	#7	\$388,728 \$1,495
Bid Package #8 – Roofing Great Lakes Roofing and Coating – Gladwin, MI	#8	\$6,557
Bid Package #9 – Joint Sealants Great Lakes Caulking – Kingsley, MI	#9	\$24,000
Bid Package #10 – Doors, Frames and Hardware (Supply Only) Allen Supply – Traverse City, MI	#10	\$107,636
Bid Package #11 – Aluminum Framing, Entrances and Glazing Northern Michigan Glass – Traverse City, MI	#11	\$432,230

Bid Package #12 – Metal Stud Framing, Ins, Gypboard and SAT Ceilings
 Ritsema Associates – Traverse City, MI #12 \$253,500

Bid Package #13 – Painting and Wall Coverings
 Hock Painting – Alger, MI #13 \$71,226
 - Add for fluid applied vapor barrier \$2,318

Bid Package #14 – Floor Coverings and Wall Tile
 Ritsema Associates – Traverse City, MI #14 \$105,320

Bid Package #15 – Resinous Epoxy Flooring
 Great Lakes Caulking – Kingsley, MI #15 \$17,800

Bid Package #16 – Interior Signage
 Blink Signs – Cleveland, OH #16 \$21,278

Bid Package #17 – Food Service Equipment
 Great Lakes West – Mattawan, MI #17 \$41,410

Bid Package #18 – Plumbing
 JE Johnson – Midland, MI #18 \$172,000

Bid Package #19 – HVAC
 JE Johnson – Midland, MI #19 \$282,000

Bid Package #20 – Electrical and Fire Alarm
 Master Electric – Gladwin, MI #20 \$295,500

SUBTOTAL	\$2,602,543.00
Contingency (15%)	\$ 390,381.00
Estimated General Conditions	\$ 65,250.00
- Add for Slab Saw cutting (Allowance)	\$ 10,000.00
Construction Manager Fee	\$ 260,000.00
TOTAL	\$3,328,174.00

Owner Provided Items

- Access Control: UP North Security - Rose City, MI \$28,846
- Appliances (Allowance) \$ 7,000
- Data/Security Cabling ?

8. Information Items

101

- Social Media Reports: COOR ISD and CATIC
- MASB Spring Institute will be May 2-4 at Mission Point Resort on Mackinac Island.

FEBRUARY 2025 SOCIAL MEDIA STATS



C.O.O.R
INTERMEDIATE
SCHOOL DISTRICT

TOP 6 POSTS OUT OF 17:

MONTHLY REACH: 8,548

UP FROM 7,808

1

Intermediate School District
Joseph Moore

at 6:53 PM

ditions, the CEC and Ac
will be closed tomorrow

REACH: 1,825

February 12th
Snow Day
11 shares - 7 reactions
18 interactions

2



REACH: 958

February 4th
**Culture & Climate
Committee**
2 shares - 46 reactions
50 interactions

3



REACH 769

February 7th
**Knights of Columbus
Check**
1 shares - 47 reactions
54 interactions

4

**Suicide Awareness
and Prevention for
Caregivers & Communities**

Thursday, March 20
10:00-7:00pm (ET), 3:30-5pm (MT)

Everyone can learn to help a student
who is at risk of suicide.

Students who are struggling with suicidal
thoughts or suicidal ideation at alarming and
rising rates. More than 20% of
teens have seriously considered suicide,
and among all young people, suicide is
the leading cause of death. Suicide is
preventable and suicide prevention is
a shared and important responsibility.

REACH: 726

February 25th
Suicide Prevention
3 shares - 5 reactions
8 interactions

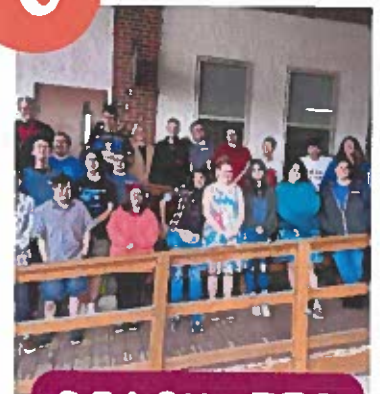
5



REACH: 607

February 24th
Snow Cones
1 shares - 25 reactions
27 interactions

6



REACH: 572

February 27th
Throwback
0 shares - 35 reactions -
36 interactions

FEBRUARY 2025 SOCIAL MEDIA STATS

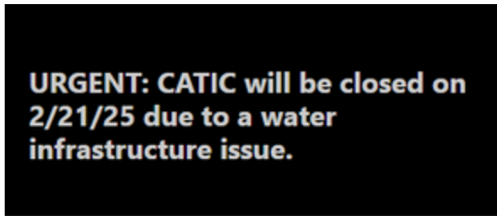


C.O.O.R.
Advanced Technical
Innovation Center

TOP 6 POSTS:

MONTHLY VIEWS: 35458
MONTHLY REACH: 7617

1



IEWS: 5979

Closure Due to Water
2594 Reach -13
interactions

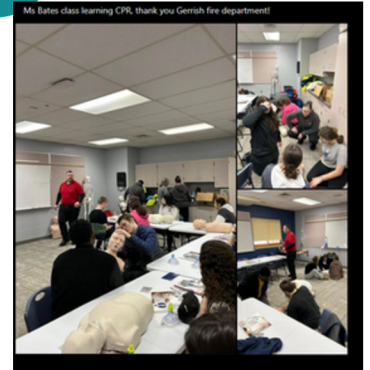
2



IEWS: 5619

Cos Hair Color
2405 Reach -16
interactions

3



IEWS: 5090

Skills USA
2044Reach -
16 interactions

4



IEWS: 4531

CTE Success Stories
2038 Reach- 23
interactions

5



IEWS: 2981

Reminder
1345Reach- 6
interactions

6



IEWS: 1633

Skills USA
811 Reach -
18 interactions

9. Alternative Educational Academy of
Ogemaw County
-March 10th agenda
-February minutes
-Engagement letter

104

Alternative Educational Academy of Ogemaw County Board Meeting
9:00 a.m.-Michigan Works, West Branch, MI
Minutes-February 24, 2025

Location: Michigan Works Service Center
2389 S. M-76
West Branch MI, 48661

9:04 Call to Order by Tina Williams

Roll Call

Board Present: Gail Hughey, Mark Berdan, Trisha Ziegler, Mike Ehinger, Llsa Bolen
Staff Present: Tina Williams
Guest Present: Shawn Petri

Mission and Vision statements read aloud.

Additions to Agenda:

none

Approval of Agenda:

Motion by Lisa Bolen; Second by Trisha Ziegler to approve agenda as presented
Motion passes 5-0

Approval of Minutes from January 27, 2025:

Motion by Mark Berdan; Second by Gail Hughey; to approve the minutes.
Motion passes 5-0

Discussion Items:

- a. Tina shared general updates:
 - i. MAEO Stars students will read a Calvary Academy on Tuesday and the Robotics team will travel to Highland on Thursday.
 - ii. 7 students are pre-registering for CTE 2025-2026
- b. Staffing was discussed; Frank Goulette (custodian) and Kathy Splan (substitute teacher) have resigned from their positions.
- c. Current Enrollment was discussed; WB-RC (51), WP (36), Other (56)/total 143
- d. Enrollment process was discussed; no concerns noted
- e. The AER cover letter and Mi School Data was presented.
- f. Discussed AEA Ogemaw legal representation by Clark-Hill

Personnel Action Items:

none

Discussion with Action Items:

- a. Motion by Mark Berdan; Second by Lisa Bolen to approve the 2024-2025 2nd Quarter Account Activity.
Yeas: Ehinger, Berdan, Hughey, Ziegler, Bolen
Nays: none
Motion passes 5-0

Next meeting: March 10, 2025 9:00 a.m. at Michigan Works

Community Input

None

Board Comments

Mark-Acknowledged Tina doing a nice job between the two AEA boards.

Adjourned at 9:28 a.m.

Minutes respectfully submitted by Tina Williams

Alternative Educational Academy of Ogemaw County Board Meeting
9:00 a.m.-Michigan Works Service Center in West Branch, MI
Agenda-March 10, 2025

1. Call to Order
2. Roll Call
3. Mission and Vision Statement

The mission of the Alternative Educational Academy is to provide innovative and responsive educational experiences through non-traditional programs that effectively meet the needs of at-risk students. The Academy will enhance educational opportunities for students by developing programs based on students' individual needs and circumstances.

“Recognizing Unlimited Potential”

4. Additions to Agenda
5. Approval of Agenda
6. Approval of Minutes from February 24, 2025
7. Discussion Items:
 - a. General Updates
 - b. Staffing
 - c. Current Enrollment
 - d. Enrollment Process
8. Personnel Action Items
 - a. Overnight Travel Request
 - b. Charles Joslin-Custodian
9. Discussion Items with Action:
 - a. Clark-Hill Engagement
10. Future Meeting Date – April 14, 2025
11. Community Input
12. Board comments
13. Adjournment



Dana L. Abrahams
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Email: DAbrahams@ClarkHill.com

Clark Hill PLC
151 S. Old Woodward Ave., Suite 200
Birmingham, MI 48009
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F (248) 642-2174

February 17, 2025

BY EMAIL
PRIVILEGED & CONFIDENTIAL

Tina Williams
Director
Alternative Education Academy of Ogemaw County
2389 M-76
West Branch, Michigan 48661

Re: Clark Hill Legal Services – Engagement

Dear Ms. Williams:

Thank you for selecting Clark Hill to represent **Alternative Education Academy of Ogemaw** (the “Client”) for its general legal needs, including, but not limited to, renewal of AEA’s 2025 Charter, assistance with Board policies/guidelines, review of AEA’s student handbook and other legal services. This letter and the attached Standard Terms of Engagement set forth the basis on which our firm will provide legal services. If we provide services before a signed copy of this letter is returned to us, those services are provided under these terms.

Whom We Represent. Our client in this matter will be **Alternative Education Academy of Ogemaw**. Our representation of the Client in this matter does not give rise to a lawyer-client relationship between the firm and any of the Client’s officers, directors, owners, employees, subsidiaries, affiliates, or other persons or entities unless we specifically agree in writing.

Scope of Engagement. We agree to represent the Client in legal matters as requested by Client, relating to the academy as described above or any other matters requested by Client, and accepted by Clark Hill, relating to other K-12 educational issues such as purchasing, construction and other real estate matters, labor and employment matters including grievances, arbitrations, disability discrimination civil rights complaints, , Board of Director matters, student matters and Freedom of Information Act requests. We agree that our engagement is limited to performance of legal services related to matters requested by Client and agreed to by Clark Hill, unless we agree otherwise in writing, we are not undertaking to represent the Client or its interests in any other matter. We will not provide business, investment, or accounting advice and understand that the Client will rely on others for such advice. We will not provide tax advice unless we specifically agree to do so in writing.

Our engagement does not include any advice or other legal services relating to federal or state securities laws, including appearing or practicing before the U.S. Securities and Exchange Commission (SEC) or the

Ms. Tina Williams
Alternative Education Academy of Ogemaw
February 17, 2025
Page 2

Client's disclosure obligations under such laws, and we understand that the Client will not, without our prior written consent, include documents or information we provide to it in any filings with federal or state securities regulators, including the SEC.

Fees. We do not require a retainer or an all-inclusive set annual fee for attorney and related services for our Education clients. Our fees will be based on the amount of time spent by the professionals working on the matter and the hourly rates we establish for each. The hourly billing rates of Education attorneys working on this engagement will be billed at \$335 per hour for Education Members/Senior Attorneys and is a range of \$285 - \$310 for Education Associates. Time devoted by paralegals is charged at the hourly rate of \$225. Hourly rates for legal services provided by attorneys outside of the Education Practice Group will be offered at a discounted rate per project. Our billing rates are subject to change from time to time and typically increase \$5-10 annually. Any further or future legal services will be billed at the hourly rate(s).

Choice of Law. The relationship between the Client and the firm, including the validity, construction, and enforceability of this engagement letter, shall be governed in all respects by the law of Michigan, without regard to conflicts of laws principles.

If you agree to the terms of this engagement as stated above and in the attached Standard Terms of Engagement, please sign and return a copy to mc. We look forward to working with you.

Sincerely,

CLARK HILL PLC



Dana L. Abrahams

DLA/tlf
Attachments

Ms. Tina Williams
Alternative Education Academy of Ogemaw
February 17, 2025
Page 3

ACKNOWLEDGEMENT OF ENGAGEMENT FOR LEGAL SERVICES

Alternative Education Academy of Ogemaw acknowledges receipt of a copy of the foregoing letter and the accompanying Standard Terms of Engagement for Legal Services and accepts and agrees to the terms and conditions stated therein.

**ALTERNATIVE EDUCATION ACADEMY OF
OGEMAW**

By: _____

Its: _____

Dated: _____, 2025

Ms. Tina Williams
Alternative Education Academy of Ogemaw
February 17, 2025
Page 4

STANDARD TERMS OF ENGAGEMENT

Entire Agreement. The engagement letter and these Standard Terms of Engagement constitute the entire understanding and agreement between the client identified in the engagement letter (the Client) and this firm regarding our representation of the client in the matter described in the engagement letter. Unless otherwise agreed, they supersede any prior understandings and agreements, written or oral, and any billing requirements, outside counsel guidelines, or letters submitted to us. If any provision of the engagement letter or these Standard Terms of Engagement is held by a court or other arbitrator to be invalid, void, or unenforceable, the remainder of the provisions shall remain in full force and effect. The engagement letter and these Standard Terms may be amended only by a written agreement between the client and the firm. The Client should review this document carefully and contact us promptly with any questions. The Client should retain this document in its file.

Client Rights and Responsibilities. The Client has the right to (A) expect competent representation by the firm; (B) determine the purposes to be served by the legal representation, so long as those purposes are legal and do not violate the firm's obligations to the profession or to the judiciary; (C) be kept reasonably informed about the status of the matter and have the firm respond promptly to reasonable requests for information; and (D) terminate the representation at any time, with or without cause, subject to the obligation for payment of legal services provided and costs incurred by the firm.

The Client has the responsibility to (A) pay the firm as provided by this agreement; (B) be candid and cooperative with the firm and any court or other tribunal; (C) keep us informed with complete and accurate information, documents, communications, and other materials relevant to the subject matter of our representation or otherwise requested by us. In a litigation matter, the Client also has the responsibility to make its officers and employees available to meet with firm personnel and to attend trials, hearings, depositions, and other proceedings, and to commit the appropriate personnel and sufficient resources to meet the Client's discovery obligations.

The Client may not (A) demand that the firm use offensive tactics or treat anyone involved in the legal process with anything but courtesy and consideration; (B) demand any assistance which violates the Rules of Professional Conduct; or (C) pursue or insist upon a course of action which the firm reasonably believes to be illegal, fraudulent, offensive, or unwise. The firm may terminate this agreement for reasons permitted under the Rules of Professional Conduct.

Because we need to be able to contact the Client at all times regarding this representation, the Client agrees to inform us, in writing, of any changes in the Client's name, address, telephone number, contact person, email address, state of incorporation, and other relevant information regarding the Client or its business. Whenever we need instructions or authorization to proceed with legal work for the Client, we will contact the Client at the most recent business address we have received. If the Client affiliates with, acquires, is acquired by, or merges with another company, it agrees to provide us with sufficient notice to permit us to withdraw as its lawyers if we determine that such affiliation, acquisition, or merger creates a conflict of interest, or that it is not in the best interests of the firm to represent the new entity.

Ms. Tina Williams
Alternative Education Academy of Ogemaw
February 17, 2025
Page 5

Whom We Represent. The person or entity whom we represent is the person or entity identified in our engagement letter. We do not represent any affiliates or related parties of that person or entity, such as owners, parent companies, subsidiaries, sibling entities, or other affiliates; or employees, officers, directors, shareholders of a corporation, partners of a partnership, members of an association or limited liability company, and/or other constituents of a named client unless our engagement letter expressly provides otherwise. Accordingly, our representation in this matter will not give rise to a conflict of interest in the event we represent other clients adverse to an affiliate or related person or entity in other matters.

Consent to Future Conflicts. As you know, Clark Hill is a large law firm and represents many other companies and individuals in many other matters. Those companies and individuals interact with one another in many different respects. Thus, during the time we are representing the Client, we may also represent other clients—including clients who are direct competitors of the Client or may otherwise have business interests that are adverse to the Client's interests—in disputes or transactions adverse to the Client that are not substantially related to this representation.

Based on the foregoing, the Client agrees that our representation of it in this matter will not disqualify our firm from in the future opposing it in litigation, transactions, or other legal matters that are not substantially related to the subject matter of this representation, and the Client consents to any conflict of interest with respect to those representations. The Client understands and agrees that the firm is not obligated to notify it when we undertake such matters that may be adverse to the Client. We agree, however, not to use any proprietary or other confidential information of a nonpublic nature concerning the Client acquired by us as a result of our representation of the Client to its disadvantage in any litigation or other matter in which we are opposed to it. Additionally, the Client agrees that we may identify the Client as a client and disclose the nature of our engagement(s) to other clients and potential clients for the limited purpose of seeking waivers of conflicts of interest. We agree, however, that the Client's consent to this disclosure shall not apply in any instance in which the revealed information would compromise the Client's attorney-client privilege.

Advice About Possible Outcomes. From time to time, either at the outset or during the course of our representation, we may express opinions or beliefs concerning the matter or various courses of action and the results that might be anticipated. Any such statement made by any lawyer of our firm is an expression of opinion only, based on information available to us at the time, and should not be construed as a promise or guarantee.

In-Firm Privilege. From time to time, issues arise relating to legal ethics or our duties under the professional conduct rules that apply to lawyers. These might include, e.g., conflict of interest issues, and could even include issues raised because of a dispute between us and a client over the handling of a matter. Normally, when such issues arise, we seek the advice of our firm counsel, who is an expert in such matters. We consider such consultations to be attorney-client privileged communications between firm personnel and the counsel for the firm. A few courts, however, have held that under some circumstances such communications involve a conflict of interest between the client and our firm and that our consultation with firm counsel may not be

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privileged, unless we either withdraw from the representation of the client or obtain the client's consent to consult with firm counsel.

We believe that it is in our clients' interest, as well as our firm's interest, that when legal ethics or related issues arise during a representation, we obtain expert analysis of our obligations. Accordingly, the Client agrees that if we determine in our own discretion during the course of the representation that it is either necessary or appropriate to consult with our internal or outside counsel, we have the Client's consent to do so and that our representation of the Client shall not, thereby, waive any attorney-client privilege that our firm may have to protect the confidentiality of our communications with counsel.

Termination of Engagement. The Client may at any time terminate our representation upon written notice to the firm. We reserve the right to withdraw from our representation as required or permitted by the applicable rules of professional conduct upon written notice to the Client. If we terminate the engagement, we will take reasonable steps to protect the Client's interests in this matter, and the Client agrees to take all steps necessary to free us of any obligation to perform further, including executing any documents necessary to complete our withdrawal. If permission for withdrawal is required by a court or other adjudicator, we will promptly request such permission, and the Client agrees not to oppose our request.

The Client's termination or our withdrawal will not relieve the Client of its obligation to pay for services rendered, including work in progress and incomplete at the time of termination, and to pay for all expenses incurred on behalf of the Client through the termination or withdrawal date.

Conclusion of Representation; Retention and Disposition of Documents. Absent express notice of termination, our representation of the Client will conclude with respect to any particular matter for which we have been engaged upon completion of our work on that matter. At the Client's written request, its original documents and property will be returned to the Client, although the firm reserves the right to retain copies of any such documents as it deems appropriate. Our files and documents pertaining to the matter will be retained by the firm. For various reasons, including the minimization of unnecessary storage expenses, and consistent with professional conduct rules, we reserve the right to destroy or otherwise dispose of any such documents or other materials retained by us at the end of the firm's retention period, which is ten years, without further notice to the Client.

Post-Engagement Matters. The Client is engaging the firm to provide legal services in connection with a specific matter. After completion of the matter, changes may occur in the applicable laws or regulations that could impact the Client's future rights and liabilities. Unless the Client engages us after completion of the matter to provide additional legal advice on issues arising from the matter, the firm has no continuing obligation to advise the Client on such issues or on future legal developments, including monitoring deadlines that may arise with respect to the matter.

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Costs. We will include in our statements separate charges for services, such as copying, messenger and delivery service, computer research, travel, international telephone, and fax charges. Such expenses may also include filing fees, deposition costs, process servers, court reporters, and witness fees. The Client authorizes us to retain any investigators, consultants, or experts necessary in our judgment to represent the Client's interests in the matter. We will usually advance costs up to \$100, and require that our clients directly pay, or deposit with us funds to pay, expenses over \$100.

Estimates. We are often requested to estimate the amount of fees and costs likely to be incurred in connection with a particular matter. But fees and costs are usually not predictable. Accordingly, we make no commitment concerning the maximum fees and costs that will be necessary to resolve or complete the matter. Any mention by us of fees and costs is only an estimate. It is also expressly understood that the Client's obligation to pay the firm's fees and costs is in no way contingent on the ultimate outcome of the matter.

Payment of Invoices. Normally, we will send monthly invoices for work performed and expenses incurred during the previous month. Payment is due promptly upon receipt of our invoice. Any balance unpaid after 30 days of the date of the invoice will accrue interest at the rate of seven percent (7%) per annum. Payments will be applied first to costs and expenses, then to accrued interest, if any, and then to the unpaid fees.

We will give the Client notice if the Client's account becomes delinquent. If the delinquency continues and the Client does not arrange satisfactory payment terms, we may withdraw from the representation and pursue collection of the account. We may also request permission of any court in which we have filed an appearance on the Client's behalf to allow us to withdraw as the Client's counsel, and the Client agrees that non-payment of our fees is a valid basis for our request to withdraw. To the extent collection of the Client's account becomes necessary, the Client agrees that, in addition to any unpaid balance and interest thereon, we will be entitled to recover all costs and expenses of collection, including reasonable attorney fees.

Retainer. We reserve the right to apply retainer funds to any delinquent payment due from the Client and to discontinue this representation until the Client replenishes the retainer. While a retainer is on deposit in our trust account, the Client grants us a security interest in such funds. Client retainers are deposited in a pooled trust account. By law, interest earned on the pooled account is paid to a charitable foundation.

Trial Advance. In a litigation matter, once a trial or hearing date is set, we may require the Client to pay all amounts then owed to us and to deposit with us the fees we estimate will be incurred in preparing for and completing the trial or arbitration, as well as jury fees and arbitration fees likely to be assessed. If the Client fails to timely pay any additional deposit requested, we will have the right to withdraw from the representation. If permission of the court or other adjudicator is required, the Company agrees not to oppose any motion to withdraw.

Electronic Communications. It is likely that during the course of this engagement both the Client and the firm will use electronic devices and Internet services (which may include

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unencrypted email, mobile phones, voice over Internet, electronic data/document websites, and other technology) to communicate and transfer documents. Although the use of this technology involves some degree of risk that third parties may access confidential communications, you agree that the benefits of using this technology outweigh the risk of accidental disclosure. Nevertheless, just as we have policies and systems in place designed to make our electronic communications with you reasonably secure, it is equally important that you communicate with us in a manner that reasonably protects the confidentiality of information we share and any attorney-client privilege that may apply to our communications. This means that you should not use any computers or other electronic devices, networks, or websites that are owned, controlled, or may be accessed by others, including but not limited to, an employer, a hotel, library, or Internet café, or a shared home computer, to send or receive confidential information to or from us. Any device you use should be password protected and not accessible for use by any third party.

10. Superintendent's Report
 - RFP bid process for CEC Construction Project
 - Boardbook Login Discussion
 - Governor's State of the State Address
 - Title IX updates
11. Communications
 - Strategic Plan 2-page summary from MASB
 - MASB Spring Institute will be at Mission Point Resort on Mackinac Island May 2-4, 2025.
12. **Adjournment**