Hamilton County Department of Education
Hamilton County Board of Education Board Meeting - Regular Session
January 15, 2026 6:00 PM
3074 Claude Ramsey Parkway
Chattanooga, TN 37421

I. Roll Call
II. **Approval of the Agenda
III. Executive Session - December 23, 2025
IV. Pledge to the Flag and Meditation - Ruth Pohlman, Principal of McConnell Elementary School
V. Exemplars of Excellence
A. Tyner Middle Academy Football Team
Tim James, District Athletic Director
B. Alpine Crest Elementary School Beta Club
Ben Connor, District 6
VI. Board Member Disclaimer Statement - I declare that I have a [spouse, parent, grandparent, child, sibling, aunt, uncle, nephew, niece, relation-in-law or member of my household] who works for the school system and that the Board's vote on [budget, policies, etc.] may have an effect on my relative's employment. Even so, I hereby certify that I will cast my vote in the best interest of the school system.
VII. **Approval of the Consent Agenda
A. Approval of the Minutes of the December 2025 Regular Session
B. Executive Committee Report
C. Deputy Superintendent - Dr. Sonia Stewart
1. Field Trips
a. Dr. Elaine Harper - Community Superintendent Harrison Bay
b. Dr. Lee Ziegler - Community Superintendent, North River
c. Dr. Shane Harwood - Community Superintendent Rock Point
d. Dr. Marques Stewart - Community Superintendent Missionary Ridge
e. Dr. Tiffany Earvin - Community Superintendent MidTown
D. Chief Financial Officer - Mary Ellen Heuton, CPA
1. Bids/Contracts
a. Request Approval of CMAR-REP 26-14, North River Elementary School Construction Manager at Risk
2. Financial Reports
3. Budget Amendments
a. Federal Grants, State Grants, and Self-Funded Programs
b. General Operating Amendments
c. School Nutrition
VIII. Chief Talent Office - Dr. Zac Brown
A. PECCA Updates
IX. Chief Strategy Officer - Shannon Moody
A. Proposed Policy Revision - Second Read
X. Administrative Business Matters
A. Chief of Opportunity and Access - Dr. Neelie Parker
Charter School Coordinator - Fannie Moore
1. ** Amendment Recommendation for Skillern Elementary
B. Chief Talent Officer - Dr. Zac Brown
1. ** Request for New and Updated Job Class Description

2. ** Revised Retiree Health Benefit Plan and Summary Description

C. Chief Operations Officer - Dr. Robert Sharpe

1. ** Approval of Lease Options for Head Start Sites
2. ** District Wide Relighting Project - Loan Agreement
3. ** Bond Funded Capital Projects and FY26 Budget Amendment - Self-funded

XI. Board Matters

A. School Board Chairman - Joe Smith

1. Review of Director Justin Robertson's Annual Performance Evaluation

XII. Information Only

A. Legal Services Report

XIII. Events/Announcements

January 16	January 19
Report Cards	Martin Luther King, Jr. Holiday
	Central Office Closed
February 19, 4:30pm	February 19, 6:00pm
Work Session	Regular Meeting

XIV. Adjourn

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

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

From: Tim James, Ed.S., District Athletic Director

Date: January, 15th 2026

Subject: Tyner Middle High Football

Board Agenda Category:

- ☐ Consent Agenda
- ☐ Action Item
- ☑ Reports and Information

2025-26 Hamilton County Schools Area Football Champions

Tyner Middle Academy's football team gained the crown as best middle school football team in our area after completing a perfect 6-0 regular season and going two for two in the post-season championship series.

From School District 5, Tyner Middle High School

School Board Member - Karista Mosley Jones
Community Superintendent – Dr. Marques Stewart
Executive Principal – Rashad Williams
Athletic Director - Dameian Suttles

It is with the highest pride and admiration that we recognize Tyner Middle Academy for exemplifying resilience and perseverance in the face of adversity. Through disciplined execution and relentless, aggressive play, this program has demonstrated the true qualities of champions. Their commitment to excellence sets a standard worthy of emulation by all programs. Tyner Middle Academy is proudly building champions, both on and off the field.

Coaches

Head Coach – Melvin White
Assistant Coach – Larry Hurston
Assistant Coach – Kevin Howard
Assistant Coach – Michael McKamey

Team members:

Kyrie Sims
Elijah Sims
Josiah Saldridge
Rylee Wadley
Charles Meadows
Dimari Brown
De'Monei Harris
Terrance Bledsoe
Santana Jones
Michael Jordan
LeDale Lyle
Leshawn Lyle
Ja'Marion Maffet
Courtney Nelson
Kaleb Pitner
Kaleb Ross
K'Jon Russell
Keelyn Stallings
Landon Thompson
LaFredrick Sails
Corey Muckle (CSLA)
Luke Haddock (CSLA)
Aiden Dubose (CSLA)
Dallas Kieth (CSLA)
Timothy Kieth (CSLA)
Hamilton Shropshire
Jabrian Tate
Kevon Ward
Chase Fort
Layden Forte
Erik Bradley
Jayceon Allen
Deonte Evans
Carter Grimes
Blake Perry
Braxton Grant
JayShun Hardley
Roland Price
Kristian Goodwin
Nirajay Lewis
Tyson Mays
Ashton Craven
Kemonti McDowell
Jahki King 8th

Tyner Middle Academy is on its way to becoming one of the most competitive athletic programs in the state. Thank you for you efforts and job well done.

"Hamilton County Schools Builds Champions."

Opportunity 2030 Commitment Connection

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

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway Chattanooga, TN 37421

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

From: Ben Connor
School Board District 6

Date: January 15, 2026

Subject: Alpine Crest Elementary School Beta Club

Board Agenda Category:

- ☐ Consent Agenda
- ☐ Action Item
- ☑ Reports and Information

At the end of November, the Alpine Crest Beta Club competed at the Tennessee State in Nashville, TN, against thousands of students in individual and group competitions. As one of the smallest clubs in attendance—and the only active elementary Beta Club in Hamilton County - the students rose to the challenge, earning numerous awards and a bid to the National Beta Convention this coming summer. Last summer, they also brought home awards from the National Convention in Orlando, FL, competing against tens of thousands of Beta students nationwide.

The awards the students earned at the state competition are as follows:

- Leon Dalton placed 2nd for spelling
- Emmett Ruvalcaba placed 5th for health and physical wellness.
- Asher Edwards placed 3rd for color photography
- Norah Rains placed 3rd for black and white photography
- Uziel Salas Lopez placed 5th for digital art
- Jenson Egeland also received the Dale R. Hughes Leadership Award, which he was nominated for by his sponsors. Only one elementary student in the whole state receives this award! His drive and determination did not go unnoticed, and we are so very proud of the ways in which he exemplifies the four pillars of Beta.

We are so proud of their hard work and accomplishments as they remain committed to the four pillars of Beta—achievement, character, leadership, and service. They show up not only for their club and school, but also for their community, filling gaps and making a meaningful impact both inside and outside the walls of our school.

The members will compete in a leadership summit in Gatlinburg, TN this coming March. Also, be attending the National Beta convention which is being held in Nashville, TN this coming summer! We could not have fathomed the reach our tiny, but mighty, club would have when we first began this journey, nor the incredible opportunities it would afford our members. Our members proudly uphold the values of this remarkable organization, and it is truly an honor serve as their sponsors.

Adults Attending:
Clarissa Williams (lead sponsor)
Jennifer French (co-sponsor)
Lisa Millard (co-sponsor)
Kim Roden (Principal)

Student's Attending: * = Placed at the conference Others are part of the team.
*Asher Edwards
*Emmett Ruvalcaba
Finn Ellinor
*Jenson Egeland
Kale'a Mathis
*Leon Dalton Nolan
Green
Sylas Ewing

Members of BETA not in attendance:
*Uziel Salas Lopez
*Norah Raines
Dominic Ward
Jack Rambo
Martina Morgan
Rowan Rhudy
Willow Andrews

Opportunity 2030 Commitment Connection
- ☐ Every Student Learns
- ☑ Every Student Belongs
- ☐ Every School Equipped
- ☐ Every Employee Valued
- ☐ Every Community Served

Minutes
Hamilton County Department of Education
Hamilton County Board of Education Board Meeting – Regular Session
December 18, 2025, 6:00 P.M.
Board Room
3074 Claude Ramsey Pkwy
Chattanooga, TN 37421

Attendance taken at 6:32 P.M.

Mrs. Jill Black:	Present (virtual)
Mr. Ben Connor:	Present
Mr. Ben Daugherty:	Present
Mr. Larry Grohn:	Absent
Mrs. Felice Hadden:	Present
Mrs. Karitsa Jones:	Present
Mr. Gary Kuehn:	Present
Mrs. Jodi Schaffer:	Present
Mr. Steve Slater:	Present
Mr. Joe Smith:	Absent
Ms. Jackie Thomas:	Present

Superintendent Dr. Justin Robertson was present.

I. **Roll Call**

II. ****Approval of the Agenda**

Passed: Motion to Approve Amended Agenda

Passed with a Motion to Amend the Agenda by pulling matters X.C.1 Review of Director Justin Robertson's Annual Performance Evaluation; IX.B.1 Grant Funded Position Approval; and VIII.A Exceptional Education – MOU with Blue Cross Blue Shield for Project SEARCH and adding matter X.D.1 School Capacity, by Mr. Steve Slater and a Second by Ms. Jackie Thomas.

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

Yes: 9; No: 0

III. **Executive Session – No**

IV. **Pledge to the Flag and Meditation – Dr. Mary Catherine Gatlin, Principal of Chattanooga School for the Liberal Arts**

V. **Exemplars of Excellence**

A. AF Bridges State School of Excellence Award Winner
Tim James, District Athletic Director
B. Eagle Scout Project of the Year – Brock Beeler
Steve Slater, District I

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

Board Member Karitsa Jones recited the Board Disclaimer Statement.

VII. ****Approval of the Consent Agenda**

Passed: Motion to approve the Consent Agenda

Passed with a Motion by Mrs. Jodi Schaffer and a Second by Ms. Jackie Thomas.

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

Yes: 9; No: 0

VII.A. Approval of the Minutes of the November 2025 Regular Session

VII.B. Deputy Superintendent – Dr. Sonia Stewart
VII.B.1. Field Trips

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

VII.B.1.b. Dr. Shane Harwood – Community Superintendent, Rock Point

VII.B.1.c. Dr. Tony Donen – Executive Principal, Workforce Development & College Schools Network

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

VII.C.1. Bids/Contracts

VII.C.1.a. Request Approval of Award BID 26-32, Westview Elementary School & North Hamilton County Elementary School Chillers

VII.C.2. Financial Reports

VII.C.3. Budget Amendments

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

VII.D. Chief Strategy Officer – Shannon Moody

VII.D.1. Proposed Policy Revision, Second Read

- 5.100 Goals for Personnel – Human Resources
- 5.101 Creation of Positions and Lines of Authority
- 5.102 Classifications and Qualifications
- 5.1021 Military Professionals Serving as JROTC Instructors
- 5.1041 American Disabilities Act (ADA)
- 5.105 Recruitment of Employees
- 5.1061 Criminal Record Checks
- 5.1062 Record Tampering
- 5.107 Classified Employees
- 5.114 Personnel Records and Employee References
- 5.1142 Employee Demographic Changes
- 5.200 Suspension/Dismissal of Non-Tenured Teachers
- 5.203 Non-Renewal
- 5.204 Resignation
- 5.205 Retirement
- 5.602 Time Schedules and Extra Duty
- 5.702 Student Teachers

VIII. Dr. Neelie Parker, Chief of Opportunity and Access
Michelle Eargle, Executive Director of Exceptional Education

VIII.A. Exceptional Education – MOU with Blue Cross Blue Shield for Project SEARCH

Matter was Pulled.

IX. **Administrative Business Matters**

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

IX.A.1. **School psychologist and Speech-language Pathologist Compensation Adjustments; Grant-Funded Position Approval; and Acceptance of School-Based Mental Health Grant

Passed: Motion to Approve School psychologist and Speech-language Pathologist Compensation Adjustments; Grant-Funded Position Approval; and Acceptance of School-Based Mental Health Grant

Passed with a Motion by Ms. Jackie Thomas and a Second by Mr. Ben Daugherty.

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

Yes: 9; No: 0

IX.A.2. **PECCA Vote and Committee Members

Passed: Motion to Approve PECCA Vote and Committee Members

Passed with a Motion by Mrs. Felice Hadden and a Second by Mr. Ben Connor.

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

Yes: 9; No: 0

IX.B. Deputy Superintendent – Dr. Sonia Stewart

IX.B.1. **Grant Funded Position Approval

Matter was Pulled.

IX.C. Chief Strategy Officer – Shannon Moody

IX.C.1. **Administrative Policy Update - Monitoring

Passed: Motion to Approve Administrative Policy Update - Monitoring

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

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

Yes: 9; No: 0

X. Board Matters

X.A. Chief Strategy Officer – Shannon Moody

X.A.1. Proposed Policies Revision, First Read

- 1.300 Committees of the Board
- 3.210 Naming New Facilities

X.B. Superintendent – Dr. Justin Robertson

X.B.1. **Request Approval for 2026 HCS Legislative Agenda

Passed: Motion to Approve 2026 HCS Legislative Agenda

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

Mr. Joe Smith:	Absent
Mrs. Jill Black:	Yes
Mr. Ben Connor:	Yes

Mr. Ben Daugherty: Yes
Mr. Larry Grohn: Absent
Mrs. Felice Hadden: Yes
Mrs. Karitsa Jones: Yes
Mr. Gary Kuehn Yes
Mrs. Jodi Schaffer: Yes
Mr. Steve Slater: Yes
Ms. Jackie Thomas: Yes
Yes: 9; No: 0

X.B.2. **Lobbying Contract January – June 2026

Passed: Motion to Approve Lobbying Contract January – June 2026

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

Mr. Joe Smith: Absent
Mrs. Jill Black: Yes
Mr. Ben Connor: Yes
Mr. Ben Daugherty: Yes
Mr. Larry Grohn: Absent
Mrs. Felice Hadden: Yes
Mrs. Karitsa Jones: Yes
Mr. Gary Kuehn Yes
Mrs. Jodi Schaffer: Yes
Mr. Steve Slater: Yes
Ms. Jackie Thomas: Yes
Yes: 9; No: 0

X.C. School Board Chairman – Joe Smith

X.C.1. Review of Director Justin Robertson's Annual Performance Evaluation

Matter was Pulled.

X.D. Ben Daugherty, District 2

X.D.1. ****School Capacity Policy**

Failed: Motion to Add School Capacity Policy and District 2 Updated Zoning Discussion to Agenda for Next Finance Committee Meeting on January 8, 2026

Motion by Mr. Ben Connor and a Second by Mrs. Felice Hadden.

Mr. Joe Smith: Absent
Mrs. Jill Black: Yes
Mr. Ben Connor: Yes

Mr. Ben Daugherty:	No
Mr. Larry Grohn:	Absent
Mrs. Felice Hadden:	Yes
Mrs. Karitsa Jones:	No
Mr. Gary Kuehn	Yes
Mrs. Jodi Schaffer:	No
Mr. Steve Slater:	No
Ms. Jackie Thomas:	No

Yes: 4; No: 5

Failed: Motion to Approve School Capacity Policy and Approve District 2 Updated Zoning with Accompanying Visual

Motion by Mr. Ben Daugherty and a Second by Mr. Steve Slater.

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

Yes: 3; No: 6

Passed: Motion to Approve School Capacity Policy and leave room to make non-substantive changes

Motion by Mr. Gary Kuehn and a Second by Ms. Jackie Thomas.

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

Yes: 7; No: 2

XI. Information Only

XI.A. Legal Services Report

XII. Events/Announcements

December 19: Students Half-Day

End of Second Quarter

December 22 – January 6: Winter Break

December 24-26: Christmas Holiday Central Office Closed

December 31- January 1: New Year's Holiday Central Office Closed

January 5-6: Professional Development

January 15, 4:30 pm: Work Session

January 15, 6:00 pm: Regular Meeting

XIII. Adjourn

The meeting was adjourned at 8:06 p.m.

_____ _____

Chairperson Date

_____ _____

Superintendent Date

Docusign Envelope ID: 4CB3D941-207D-46BD-9380-51CB5EDC5C09

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

REQUEST FOR EMERGENCY/EARLY APPROVAL

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

From: Dr. Robert Sharpe, Chief Operations Officer
Kristen Nauss, Director of the School Nutrition Department

Date: December 18, 2025

Subject: Emergency/ Early Approval for Bid File # 26-29 Kitchen Equipment for the School Nutrition Program

The School Nutrition Program is requesting an early approval for the bid file # 26-29 Kitchen Equipment for the School Nutrition Program for the FY26.

We propose **the following vendors** for these awards:
Item # 1, 2, 3, 4, and 5 Singer H & R
Item # 6, 7, 8, 9, and 10 Spirit Service Group/DBA Aaron Equipment
Item # 11, 12, 13, and 14 Chef's Depot

All proposed vendors have met the required specifications and are fully capable of fulfilling our program's needs.

The total project cost is $412,785.00, which encompasses multiple pieces of kitchen equipment designated for various schools. This purchase will replace broken and outdated equipment that is no longer repairable.

This investment will:

- Modernize our food service operations
- Enhance efficiency across school kitchens
- Strengthen resource management within the program

We respectfully request your approval of this initiative so that we may finalize purchase orders and ensure the equipment is installed and operational by Spring.

Signed by: Kristen Nauss 12/18/2025
CA522EE8DD7248C...
Mrs. Kristen Nauss
SN DIRECTOR

Signed by: Dr. Robert Sharpe 12/18/2025
566CD0D2DC144B8...
Dr. Robert Sharpe
CHIEF OPERATION OFFICER

Approved:

Docusign Envelope ID: 4CB3D941-207D-46BD-9380-51CB5EDC5C09

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

REQUEST FOR EMERGENCY/EARLY APPROVAL

Signed by:
Dr. Justin Robertson 12/18/2025
4D76312655B6468...
Dr. Justin Robertson
SUPERINTENDENT

Signed by:
Mr. Joe Smith 12/23/2025
A11684E245B840D...
Mr. Joe Smith
BOARD CHAIRMAN

Opportunity 2030 Commitment Connection

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

Docusign Envelope ID: 4CB3D941-207D-46BD-9380-51CB5EDC5C09

TABULATION FOR KITCHEN EQUIPMENT FOR THE SCHOOL NUTRITION PROGRAM FY26 BID FILE # 26-29

Group A with installation			Federal Supply		Trimark USA Non Responsive		Spirit Service Group/DBA Aaron Equipment.		BOELTER		BRESCO		Chef's Depot		Mobile Fixture		Singer		Supreme Restaurant Supply	
Item	Qty	Description	Price per unit, including delivery and installation	Total Price Installed	Price per unit, including delivery and installation	Total Price Installed	Price per unit, including delivery and installation	Total Price Installed	Price per unit, including delivery and installation	Total Price Installed	Price per unit, including delivery and installation	Total Price Installed	Price per unit, including delivery and installation	Total Price Installed	Price per unit, including delivery and installation	Total Price Installed	Price per unit, including delivery and installation	Total Price Installed	Price per unit, including delivery and installation	Total Price Installed
1	4	Double-stacked Combination Oven/Steamer ICP Duo 6-FULL G Rational Natural Gas or Pre-Approved Equal.	23,100.64	184,805.14	Non responsive		48,592.28	194,369.12	43,786.18	175,144.72	44,706.00	178,824.00	40,891.46	163,565.84	23,362.12	186,896.96	38,598.86	154,395.44	43,391.51	173,566.04
			Cleveland						UNOX		VULCAN		VULCAN		VULCAN		VULCAN		UNOX	
2	1	Single Combination Oven/Steamer ICP 6-FULL G Rational Natural Gas or Pre-Approved Equal.	23,377.57	23,377.57			23,017.66	23,017.66	23,865.31	23,865.31	23,533.00	23,533.00	22,489.63	22,489.63	21,869.06	21,869.06	1,910.67	19,910.67	23,753.34	23,753.34
			Cleveland						UNOX		VULCAN		VULCAN		VULCAN				UNOX	
		Total for Items #1 and #2		208,182.71				217,386.78		199,010.03		202,357.00		186,055.47		208,766.02		174,306.11		197,319.38
Group B with installation																				
3	2	Double-stacked Combination Oven/Steamer 7-20E Alto Shaam Electric or Pre-Approved Equal.	19,246.66	76,986.64			44026.13	88,052.26	18,626.20	74,504.80	39,990.00	79,980.00	35,955.70	71,911.41	40,789.92	81,579.84	33,885.60	67,771.20	50,592.34	101,184.71
			Cleveland						UNOX		VULCAN		VULCAN		RATIONAL		VULCAN		UNOX	
4	1	Chemicals for Alto Shaam Combi or Pre-Approved Equal:	103.01	1,030.10			182.83	1,462.64	95.16	1,522.56	1,053.00	1,053.00	903.4	903.40	179.34	1,434.72	1,379.68	1,379.68	100.10	1,601.60
									ALTO SHAAM		VULCAN		Alto Shaam				Alto Shaam			
		Total for Items #3 and #4		78,016.74				89,514.90		76,027.36		81,033.00		72,814.81		83,014.56		69,150.88		102,786.31
		Item # 5 with installation																		
5	1	Hobart PW20N-ADV Dish Machine or Pre-Approved Equal.	51113.18	51,113.18			44,800.88	44,800.88	42,178.40	42,178.40	44,819.00	44,819.00	44,803.44	44,803.44	44,343.63	44,343.63	41,918.47	41,918.47		NO BID
		Total Item #5		51,113.18				44,800.88		42,178.40		44,819.00		44,803.44		44,343.63		41,918.47		
WITHOUT INSTALLATION																				
Item	Qty	Description	Price per unit, including delivery	Total Price (including delivery)	Price per unit, including delivery	Total Price (including delivery)	Price per unit, including delivery	Total Price (including delivery)	Price per unit, including delivery	Total Price (including delivery)	Price per unit, including delivery	Total Price (including delivery)	Price per unit, including delivery	Total Price (including delivery)	Price per unit, including delivery	Total Price (including delivery)	Price per unit, including delivery	Total Price (including delivery)	Price per unit, including delivery	Total Price (including delivery)
6	1	Pass Through Refrigerator 2-Section TRUE STR2RPT-2G-2G-HC or Pre-Approved Equal:	17,959.44	17,959.44			12,712.84	12,712.84	15,194.46	15,194.46	13,672.00	13,672.00	14,013.08	14,013.08	14,668.92	14,668.92	15,735.41	15,735.41	16,887.67	16,887.67
7	3	Reach-In Refrigerator 2-Section TRUE STR2R-2S-HC or Pre-Approved Equal.	10,961.04	32,883.12			7,596.04	22,788.12	9,201.81	27,605.43	8,198.00	24,594.00	8,385.82	25,157.46	8,876.86	26,630.58	9,561.79	28,685.37	11,166.23	33,498.69
8	2	Reach-In Refrigerator 1-Section TRUE T-STR1R-1G-HC or Pre-Approved Equal:	8,690.31	17,380.62			6,241.60	12,483.20	7,253.76	14,507.52	6,469.99	12,938.00	6,610.47	13,220.94	5,215.70	10,431.40	7,416.57	14,833.14	7,195.69	14,391.38
															CONTINENTAL					
9	3	Reach-In Refrigerator TSD-09G-HC-LD 36" or Pre-Approved Equal:	4,487.01	13,461.03			3,068.51	9,205.53	3,647.21	10,941.63	3,251.00	9,753.00	3,324.16	9,972.48	3,518.81	10,556.43	3,850.67	11,552.01	3,795.32	11,385.96
10	3	Reach-In Freezer 2-Section TRUE STR2F-HC or Pre-Approved Equal.	12,937.29	38,811.87			9,167.19	27,501.57	10,896.27	32,688.81	9,712.00	29,136.00	9,930.94	29,792.82	9,457.96	28,373.88	10,710.73	32,132.19	10,139.99	30,419.97
															CONTINENTAL					
11	3	Beverage Air ST49HC-W Milk Cooler or Pre-Approved Equal	3,527.88	10,583.64			3,636.99	10,910.97	3,891.52	11,674.56	3,161.00	9,483.00	2,971.94	8,915.82	4,049.97	12,149.91	3,743.24	11,229.72	4,128.61	12,385.83
															CONTINENTAL					
12	3	Beverage Air ST58HC-W Milk Cooler or Pre-Approved Equal	3,824.26	11,472.78			3,942.54	11,827.62	4,218.39	12,655.17	3,427.00	10,281.00	3,221.62	9,664.86	4,345.28	13,035.84	4,049.25	12,147.75	4,968.72	14,906.16
															CONTINENTAL					
13	3	Beverage Air ST34HC-W Milk Cooler or Pre-Approved Equal.	3,147.17	9,441.51			3,244.50	9,733.50	3,471.50	10,414.50	2,820.00	8,460.00	2,651.22	7,953.66	3,659.03	10,977.09	3,350.02	10,050.06	4,184.00	12,552.00
															CONTINENTAL					
14	5	Hoshizaki KML-325MAJ 30" Crescent Cube Ice Machine Head -Sub KMD-355MAJ or Pre-Approved Equal:	4,053.16	20,265.80			3,803.63	19,018.15	3,510.20	17,551.00	3,790.00	18,950.00	3,236.61	16,183.05	3,530.38	17,651.90	3,713.44	18,567.20	3,785.51	18,927.55

Award vendors
Non Responsive vendor
Non approved

412,784.11

Docusign Envelope ID: 94E5250F-F0F8-4B4E-BB43-8156BF49E2E7

HAMILTON COUNTY SCHOOLS

VEHICLE SURPLUS DISPOSAL AUTHORIZATION FORM

Date: 12/17/2025 Department: Transportation

Phone Number: 423-498-5555 Contact Person: Brandon Allen

This form is to be used for declaring surplus and to make the property available for redeployment, sale, or disposal. Always refer to the HCDE Intranet for the latest version of this form as it may change periodically.

Complete Information Below (one vehicle per form)			
Vehicle Description:	**Tag #:** 2871-GE **Year:** 2017 **Make:** Chevy **Model:** Express **Mileage:** 165936 **Color:** White		
Condition (working, non-working, etc.):	Working but needs a lot of work.		
Serial/Vin Number:	1GCWGAFF9H1292583	**Fixed Asset Number:**	E795
Estimated Value:	$ 500		
Location:	2501 Dodds Ave. Chatt., TN 37407		
Note: Attach photographs of vehicle to this form upon submission.			

Initial TB

I hereby certify the above-described personal property is no longer capable of being used for its original, intention or because of condition. I declare it surplus property and authorize the disposal.

DocuSigned by: Brandon Allen 80CA98B242FC40C... 12/17/2025

School Principal/Director/Department Administrator

Signed by: Dr. Justin Robertson 4D76312655B6468... 12/23/2025

Superintendent

Signed by: Joe Smith A11684E245B840D... 12/27/2025

School Board Chairman

Requested Disposition:

- ☐ **Trash**
- ☐ **Transfer to County School/Agency**
- ☒ **(est. ≥ $500) Dispose via Auction**
- ☐ **(est. < $500) Dispose via Scrap Metal Sales**

Approved Disposition:

- ☐ **Dispose via Trash/Dumpster**
- ☐ **Redeployed to:** _____
- ☒ **Sell via District Approved Auction Firm**
  Compass Auction
- ☐ **Sell via District Approved Scrap Metal/Recycling Firm**
  _____

TR

Tracking Number: ~~MX~~-12172025-E795-VIN-1GCWGAFF9H1292583

Docusign Envelope ID: 94E5250F-F0F8-4B4E-BB43-8156BF49E2E7

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

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

From: Dr. Elaine Harper, Community Superintendent, HBLC

Date: January 15, 2026

Subject: Harrison Bay Overnight Field Trip Approval

Board Agenda Category:

- ☑ Consent Agenda
- ☐ Action Item
- ☐ Reports and Information

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1. **Central High**-One student from the Bowling Team will travel to the Smyrna Bowling Center in Smyrna, Tennessee, to compete in the Individual State Bowling Tournament. The student will depart January 20, 2026, and return January 22, 2026.
2. **East Hamilton High**-Nineteen students from the Cheer Team will travel to the ESPN Wild World of Sports Resort in Orlando, Florida, to compete in the National Cheerleading Championship. They will depart January 29, 2026, and return February 2, 2026.
3. **East Hamilton High**-Ten students from the Band will travel to the Park Vista Hotel and Resort in Gatlinburg, Tennessee, to participate in the State Honor Band. They will depart February 5, 2026, and return February 7, 2026.
4. **Ooltewah High**-Five students from the JROTC Marksmanship Team will travel to compete in the JROTC Service Championship in Anniston, Alabama. They will depart February 5, 2026, and return February 7, 2026.
5. **Chattanooga School for the Liberal Arts**-Eighty-four sixth grade students will travel to participate in Nature's Classroom in Mentone, Alabama. They will depart May 12, 2026, and return May 15, 2026.

Opportunity 2030 Commitment Connection

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

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 12/16/25 2:45 PM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School Central High Grade/Group/Team Central Bowling

Departure Date/Time 01/20/26 8:00am Return Date/Time 01/22/26 3:00pm

Event/Venue Smyrna Bowling Center Address 95 Weakley Ln #4341, Smyrna, TN 37167

Instructional value Individual State Tournament

Evaluation The student will be under parental supervision outside of direct bowling times on the 21st.

Fee Requested $ 0.00 How Acquired? N/A

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

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

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

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

☐ Other: _____
☐ County School Bus Cost $_____ Bus # _____ Driver's Name _____
☐ Handicap Accessible Bus Cost $_____
☐ Charter Bus (**Board Approved**) _____ Cost $_____
☑ Cars List Driver(s) Student Parent/Brandon Russell Cost $ N/A

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

List Chaperones:

Staff: Brandon Russell

Chaperones: _____

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

***Overnight Field Trips**

*Number of students not attending for economic reasons 0

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

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

*Projects students have undertaken to secure funds 1

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

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

Teacher Name: Brandon Russell Date Submitted: 12/16/25 2:45 PM

Secretary Name & Approval: KIMBERLY CRAWFORD Approved - Secretary 12/17/25

Principal's Name & Approval: LEANGELA ROGERS Approved - Principal 12/17/25

Director Admin Name & Approval: _____

Director Name & Approval: _____

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 12/17/25

LC Super Name & Approval: ELAINE HARPER Approved - LC Superintendent 12/17/25

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 12/16/25 11:32 AM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School East Hamilton High Grade/Group/Team High School Cheerleaders

Departure Date/Time 01/29/26 6:00 am Return Date/Time 02/02/26 8:00 pm

Event/Venue Nationals Championship/ESPN Wild World Resorts Address 700 S Victory Way, Orlando Florida 34747

Instructional value Cheer team will be competing against other High School teams across the nation. Team bonding

Evaluation Competing for the Nationals title

Fee Requested $ 0.00 How Acquired? Booster Club-Restricted, Fundraiser(s)/Donation(s)

Total # of Students 19 Total # of Staff 2 Total # of Chaperones 0 Nurse Required: No

Number of subs needed 0 Funding source for subs

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

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

☐ Other:
☐ County School Bus Cost $ Bus # Driver's Name
☐ Handicap Accessible Bus Cost $
☐ Charter Bus (**Board Approved**) Cost $
☑ Cars List Driver(s) Parents are responsible for student transportation Cost $ 0

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

List Chaperones:

Staff: Martha Paige Stewart and Renata Allison

Chaperones:

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

***Overnight Field Trips**

*Number of students not attending for economic reasons 0

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

*Estimated cost to parent support groups for this trip $ 24000.00

*Projects students have undertaken to secure funds Fundraisers

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

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

Teacher Name: Martha Paige Stewart Date Submitted: 12/16/25 11:32 AM

Secretary Name & Approval: STEPHANIE CRAMER Approved - Secretary 12/17/25

Principal's Name & Approval: BRENTLEY ELLER Approved - Principal 01/05/26

Director Admin Name & Approval:

Director Name & Approval:

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 01/05/26

LC Super Name & Approval: ELAINE HARPER Approved - LC Superintendent 01/05/26

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 11/25/25 10:20 AM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School East Hamilton High Grade/Group/Team 9-12 Band

Departure Date/Time 02/05/26 8:30am Return Date/Time 02/07/26 6pm

Event/Venue ETSBOA Sr. Clinic Honor Band- Park Vista Hotel, Gatlinburg Address 705 Cherokee Orchard Rd, Gatlinburg, TN 37738

Instructional value For selected students to gain knowledge and experience through participation in an honor band

Evaluation through performance

Fee Requested $ 75.00 How Acquired? School Funds, Student/Parent

Total # of Students 10 Total # of Staff 2 Total # of Chaperones 0 Nurse Required: No

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

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

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

☐ Other: _____

☐ County School Bus Cost $_____ Bus # _____ Driver's Name _____

☐ Handicap Accessible Bus Cost $_____

☑ Charter Bus (**Board Approved**) Nooga Shuttles Inc Cost $ TBA

☑ Cars List Driver(s) Parents will pick up their own students to transport home Cost $ 0

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

List Chaperones:

Staff: Molly Epperson, Joshua Light (SDHS)

Chaperones: _____

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

*Overnight Field Trips

*Number of students not attending for economic reasons 0

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

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

*Projects students have undertaken to secure funds none

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

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

Teacher Name: Molly Epperson Date Submitted: 11/25/25 10:20 AM

Secretary Name & Approval: STEPHANIE CRAMER Approved - Secretary 12/09/25

Principal's Name & Approval: BRENTLEY ELLER Approved - Principal 12/09/25

Director Admin Name & Approval: _____

Director Name & Approval: _____

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 12/09/25

LC Super Name & Approval: ELAINE HARPER Approved - LC Superintendent 12/09/25

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 12/15/25 7:54 PM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School Ooltewah High Grade/Group/Team JROTC Marksmanship Team

Departure Date/Time 02/05/26 7:30 AM Return Date/Time 02/07/26 4:00 PM

Event/Venue JROTC Service Championships Address 1470 Sentinel Drive, Anniston, AL 36207

Instructional value What You Will Learn to Do: Demonstrate marksmanship proficiency in a regulation 3x20 course. Linked Core Abilities: • Take responsibility for your actions and choices • Apply critical thinking techniques Learning Objectives: • Describe and participate in sports competition opportunities available to JROTC and school marksmanship team members • Complete a regulation course of fire (3x20 shots) on the official air rifle target/Athena Systemerformance Assessment • Complete a final using the Olympic final round format

Evaluation

Fee Requested $ 0.00 How Acquired? N/A

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

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

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

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

☐ Other:
☐ County School Bus Cost $ Bus # Driver's Name
☐ Handicap Accessible Bus Cost $
☐ Charter Bus (**Board Approved**) Cost $
☑ Cars List Driver(s) Parents transporting the Cadets in their vehicles. Cost $ 0

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

List Chaperones:

Staff: Michael Dupre / Mallary Netterville

Chaperones:

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

***Overnight Field Trips**

*Number of students not attending for economic reasons 0

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

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

*Projects students have undertaken to secure funds NA

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

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

Teacher Name: Michael Dupre Date Submitted: 12/15/25 7:54 PM

Secretary Name & Approval: TINA LEE Approved - Secretary 12/18/25

Principal's Name & Approval: DONALD MULLINS Approved - Principal 12/18/25

Director Admin Name & Approval:

Director Name & Approval:

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 01/05/26

LC Super Name & Approval: ELAINE HARPER Approved - LC Superintendent 01/05/26

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 10/06/25 2:29 PM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School CSLA Grade/Group/Team Sixth Grade

Departure Date/Time 05/12/26 10:00 AM Return Date/Time 05/15/26 2:00 PM

Event/Venue Nature's Classroom Address 755 County Rd 614 Mentone Alabama 35984

Instructional value Students will participate in instructional classes with emphasis on science, math, problem solving, team building, art, and history

Evaluation Completion of journal writing, classes and student seminar

Fee Requested $ 450.00 How Acquired? Student/Parent

Total # of Students 84 Total # of Staff 8 Total # of Chaperones 1 Nurse Required: No

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

- Total # of Students with 504 Plan 9 Modifications Needed None
- Total # of Students with Disabilities 15 Modifications Needed none needed

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

☐ Other: _____

☑ County School Bus Cost $ 2400.00 Bus # N/A Driver's Name Deborah Shugart

☐ Handicap Accessible Bus Cost $ _____

☐ Charter Bus (**Board Approved**) _____ Cost $ _____

☐ Cars List Driver(s) _____ Cost $ _____

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

List Chaperones:

Staff: R. Alverson, C. Cole, D. Basler, N. Reitenour, A. Heisig,M. Striker, S. Van Delinder, A. Ballard

Chaperones: Brandi Ray

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

***Overnight Field Trips**

*Number of students not attending for economic reasons 5

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

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

*Projects students have undertaken to secure funds 0

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

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

Teacher Name: Melissa Striker Date Submitted: 10/06/25 2:29 PM

Secretary Name & Approval: LESLIE LINGERFELT Approved - Secretary 10/07/25

Principal's Name & Approval: DR MARY CATHERINE GATLIN Approved - Principal 10/07/25

Director Admin Name & Approval: _____

Director Name & Approval: _____

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 11/24/25

LC Super Name & Approval: ELAINE HARPER Approved - LC Superintendent 11/24/25

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

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

From: Dr. Lee Ziegler, Community Superintendent, NRLC

Date: January 15, 2026

Subject: North River Overnight Field Trip Approval

Board Agenda Category:

- ☑ Consent Agenda
- ☐ Action Item
- ☐ Reports and Information

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1. **Soddy Daisy High-**Fourteen students from the Cheer Team will travel to Nobleman in Ft. Worth, Texas, to compete in the NCA National Cheer Championship. They will depart January 22, 2026, and return January 26, 2026.
2. **Hixson High-**Ten students from the Band will travel to the Park Vista Hotel and Resort in Gatlinburg, Tennessee, to participate in the ETSBOA All East Senior Clinic Honor Band. They will depart February 5, 2026, and return February 7, 2026.
3. **Hixson High-**One student from the Orchestra will travel to the Park Vista Hotel and Resort in Gatlinburg, Tennessee, to participate in the ETSBOA All East Senior Clinic Honor Band. The student will depart February 5, 2026, and return February 7, 2026.
4. **Soddy Daisy High-**Fifteen students from the Forensics Team will travel to Sullivan East High in Bluff City, Tennessee, to compete in a forensics competition. They will depart February 6, 2026, and return February 7, 2026.
5. **Hixson High-**Eight students from the Wrestling Team will travel to the Franklin County Ag Center in Franklin, Tennessee, to compete in the TSSAA State Traditional Wrestling Tournament. They will depart February 19, 2026, and return February 21, 2026.
6. **Hixson High-**Fifteen students from the BETA Club will travel to the Gatlinburg Convention Center in Gatlinburg, Tennessee, to participate in the BETA Club Leadership Summit. They will depart March 11, 2026, and return March 13, 2026.
7. **Soddy Daisy High-**Seventy students from the Band will travel to perform at Universal Studios in Orlando, Florida. They will depart March 16, 2026, and return March 20, 2026.

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

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 12/11/25 6:22 PM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School Soddy Daisy High Grade/Group/Team Cheerleading

Departure Date/Time 01/22/26 6:00am Return Date/Time 01/26/26 9:00pm

Event/Venue NCA High School Nationals/Nobleman Fort Worth Address 1201 Houston St, Fort Worth, TX 76102/503 Bryan Ave Ft Worth TX 76104

Instructional value Cheerleaders have been preparing and competing all season and earned a bid to NCA High School Nationals to compete against teams from all over the country.

Evaluation Routines will be performed in two different divisions/categories and judged by trained cheer professionals in hopes of earning 1st place.

Fee Requested $ 500.00 How Acquired? Fundraiser(s)/Donation(s)

Total # of Students 14 Total # of Staff 3 Total # of Chaperones 0 Nurse Required: No

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

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

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

☑ Other: Flights - paid for by parents
☐ County School Bus Cost $_____ Bus # _____ Driver's Name _____
☐ Handicap Accessible Bus Cost $_____
☐ Charter Bus (**Board Approved**) _____ Cost $_____
☑ Cars List Driver(s) Parents providing student transportation Cost $ 0

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

List Chaperones:

Staff: Breanne Dalton, Lacey Brown, Cristina Burdine

Chaperones: _____

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

*Overnight Field Trips

*Number of students not attending for economic reasons 0

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

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

*Projects students have undertaken to secure funds Sponsorships, Winter Formal Dance, Calendar Sales

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

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

Teacher Name: Breanne Dalton Date Submitted: 12/11/25 6:22 PM

Secretary Name & Approval: TINA BISHOP Approved - Secretary _____

Principal's Name & Approval: ANGELA CASS Approved - Principal 12/12/25

Director Admin Name & Approval: _____ _____ _____

Director Name & Approval: _____ _____ _____

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 12/18/25

LC Super Name & Approval: LEE ZIEGLER Approved - LC Superintendent 12/18/25

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 01/05/26 8:13 AM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School Hixson High Grade/Group/Team Select 9-12 Band Students

Departure Date/Time 02/05/26 9 AM Return Date/Time 02/07/26 5 PM

Event/Venue ETSBOA Senior Clinic, Park Vista Hotel Address 705 Cherokee Orchard Rd. Gatlinburg, TN 37738

Instructional value Students audition and are selected to perform in this honor band. Students will learn music with a professional in the music field and perform a concert for the public on Saturday

Evaluation Students will be evaluated through their performance Saturday.

Fee Requested $ 200.00 How Acquired? Student/Parent

Total # of Students 10 Total # of Staff 1 Total # of Chaperones 1 Nurse Required: No

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

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

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

☐ Other: _____

☐ County School Bus Cost $_____ Bus # _____ Driver's Name _____

☐ Handicap Accessible Bus Cost $_____

☑ Charter Bus (**Board Approved**) Nooga Shuttles Inc Cost $ 1600

☑ Cars List Driver(s) Parents providing student transportation home. Cost $ 0

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

List Chaperones:

Staff: Torey Hart

Chaperones: Jalen Talley

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

*Overnight Field Trips

*Number of students not attending for economic reasons 0

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

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

*Projects students have undertaken to secure funds N/A

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

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

Teacher Name: Torey Hart Date Submitted: 01/05/26 8:13 AM

Secretary Name & Approval: TRACY MILLER Approved - Secretary _____

Principal's Name & Approval: LUNT_DANIEL@HCDE.ORG Approved - Principal 01/05/26

Director Admin Name & Approval: _____ _____ _____

Director Name & Approval: _____ _____ _____

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 01/05/26

LC Super Name & Approval: LEE ZIEGLER Approved - LC Superintendent 01/05/26

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 01/05/26 1:25 PM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School Hixson High Grade/Group/Team Orchestra

Departure Date/Time 02/05/26 9:00 AM Return Date/Time 02/07/26 1:00 PM

Event/Venue All East Senior Clinic/Park Vista Hotel Address 705 Cherokee Orchard Road, Gatlinburg, TN, 37738, US

Instructional value If the student is accepted to attend, they will get to rehearse with other chosen members from East Tennessee under the direction of an esteemed educator and perform on Saturday.

Evaluation Performance on Saturday

Fee Requested $ 125.00 How Acquired? Student/Parent

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

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

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

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

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

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

List Chaperones:

Staff: Sara Daniels, Colton Brown

Chaperones:

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

*Overnight Field Trips

*Number of students not attending for economic reasons 0

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

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

*Projects students have undertaken to secure funds 0

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

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

Teacher Name: Sara Daniels Date Submitted: 01/05/26 1:25 PM

Secretary Name & Approval: TRACY MILLER Approved - Secretary

Principal's Name & Approval: LUNT_DANIEL@HCDE.ORG Approved - Principal 01/05/26

Director Admin Name & Approval:

Director Name & Approval:

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 01/05/26

LC Super Name & Approval: LEE ZIEGLER Approved - LC Superintendent 01/05/26

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 12/10/25 11:59 AM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School Soddy Daisy High Grade/Group/Team Forensics Team

Departure Date/Time 02/06/26 8:00 AM Return Date/Time 02/07/26 9:00 PM

Event/Venue Forensics Competition/Sullivan East High School Address 4180 Weaver Pike, Bluff City, TN 37618

Instructional value Competition

Evaluation Performance

Fee Requested $ 10.00 How Acquired? Student/Parent

Total # of Students 15 Total # of Staff 1 Total # of Chaperones 2 Nurse Required: No

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

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

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

☐ Other:
☐ County School Bus Cost $ Bus # Driver's Name
☐ Handicap Accessible Bus Cost $
☐ Charter Bus (**Board Approved**) Cost $
☑ Cars List Driver(s) Heather Montgomery, Melanie Cardwell, Parents to provide student transportation Cost $ 0.00

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

List Chaperones:

Staff: Jaden Partain

Chaperones: Heather Montgomery, Melanie Cardwell

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

*Overnight Field Trips

*Number of students not attending for economic reasons 0

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

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

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

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

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

Teacher Name: Jaden Partain Date Submitted: 12/10/25 11:59 AM

Secretary Name & Approval: TINA BISHOP Approved - Secretary

Principal's Name & Approval: ANGELA CASS Approved - Principal 12/18/25

Director Admin Name & Approval:

Director Name & Approval:

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 01/05/26

LC Super Name & Approval: LEE ZIEGLER Approved - LC Superintendent 01/05/26

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 12/29/25 4:14 PM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School Hixson High Grade/Group/Team Wrestling team

Departure Date/Time 02/19/26 3:00 pm Return Date/Time 02/21/26 11:30 pm

Event/Venue TSSAA Wrestling Traditional Tournament/Franklin Co Ag Ctr Address 4215 Long Ln, Franklin, TN 37064

Instructional value state tournament

Evaluation placers

Fee Requested $ 0.00 How Acquired? School Athletic Fund, Booster Club-Restricted, Fundraiser(s)/Donation(s)

Total # of Students 8 Total # of Staff 3 Total # of Chaperones 1 Nurse Required: No

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

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

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

☐ Other: _____
☐ County School Bus Cost $_____ Bus # _____ Driver's Name _____
☐ Handicap Accessible Bus Cost $_____
☐ Charter Bus (**Board Approved**) _____ Cost $_____
☑ Cars List Driver(s) Garrick Hall. Josh Edmondson, Wrestlers parents Cost $ 0

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

List Chaperones:

Staff: Garrick Hall. Josh Edmondson, Ryle Hart

Chaperones: Zander Hutson

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

*Overnight Field Trips

*Number of students not attending for economic reasons 0

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

*Estimated cost to parent support groups for this trip $ 1500

*Projects students have undertaken to secure funds fund raisers

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

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

Teacher Name: Garrick Hall Date Submitted: 12/29/25 4:14 PM

Secretary Name & Approval: TRACY MILLER Approved - Secretary _____

Principal's Name & Approval: LUNT_DANIEL@HCDE.ORG Approved - Principal 12/29/25

Director Admin Name & Approval: _____ _____ _____

Director Name & Approval: _____ _____ _____

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 01/05/26

LC Super Name & Approval: LEE ZIEGLER Approved - LC Superintendent 01/05/26

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 12/15/25 2:10 PM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School Hixson High Grade/Group/Team BETA Club

Departure Date/Time 03/11/26 3:00pm Return Date/Time 03/13/26 4:00pm

Event/Venue BETA Club Leadership Summit at Gatlinburg Convention Center Address 234 Airport Road, Gatlinburg, TN 37738

Instructional value Students will demonstrate leadership skills through a variety of challenges and competitions.

Evaluation Students will be evaluated by a panel of judges.

Fee Requested $ 250.00 How Acquired? Student/Parent

Total # of Students 15 Total # of Staff 2 Total # of Chaperones 0 Nurse Required: No

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

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

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

☐ Other: _____
☐ County School Bus Cost $_____ Bus # _____ Driver's Name _____
☐ Handicap Accessible Bus Cost $_____
☐ Charter Bus (**Board Approved**) _____ Cost $_____
☑ Cars List Driver(s) Chris Cain, Rebecca Schmidt Cost $ 0

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

List Chaperones:

Staff: Chris Cain and Rebecca Schmidt

Chaperones: _____

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

***Overnight Field Trips**

*Number of students not attending for economic reasons 0

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

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

*Projects students have undertaken to secure funds 0

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

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

Teacher Name: Chris Cain Date Submitted: 12/15/25 2:10 PM

Secretary Name & Approval: TRACY MILLER Approved - Secretary _____

Principal's Name & Approval: LUNT_DANIEL@HCDE.ORG Approved - Principal 12/16/25

Director Admin Name & Approval: _____ _____ _____

Director Name & Approval: _____ _____ _____

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 12/17/25

LC Super Name & Approval: LEE ZIEGLER Approved - LC Superintendent 12/17/25

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 11/24/25 11:00 AM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School Soddy Daisy High Grade/Group/Team Band 9-12

Departure Date/Time 03/16/26 6:00am Return Date/Time 03/20/26 9:00pm

Event/Venue Performance/Universal Studios Address Universal Studios Florida, 6000 Universal Blvd, Orlando, FL 32819

Instructional value Students will be doing a performance at Universal Studios in Orlando Florida if accepted.

Evaluation Public Performance

Fee Requested $ 996.00 How Acquired? Student/Parent

Total # of Students 70 Total # of Staff 2 Total # of Chaperones 5 Nurse Required: No

Number of subs needed 0 Funding source for subs

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

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

☐ Other:
☐ County School Bus Cost $ Bus # Driver's Name
☐ Handicap Accessible Bus Cost $
☑ Charter Bus (**Board Approved**) Premier Transportation Cost $ $18,514.00
☐ Cars List Driver(s) Cost $

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

List Chaperones:

Staff: Joshua Light, Rebecca Light

Chaperones: Mandy Suttles, Jeremy Waddell, Erin Waddell, Leigh Smith, Donna Meade

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

*Overnight Field Trips

*Number of students not attending for economic reasons 0

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

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

*Projects students have undertaken to secure funds none

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

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

Teacher Name: Joshua Light Date Submitted: 11/24/25 11:00 AM

Secretary Name & Approval: TINA BISHOP Approved - Secretary

Principal's Name & Approval: ANGELA CASS Approved - Principal 12/03/25

Director Admin Name & Approval:

Director Name & Approval:

LC Super Admin Name & Approval: ALYSSA TEAL Approved - LC Assistant 01/05/26

LC Super Name & Approval: LEE ZIEGLER Approved - LC Superintendent 01/05/26

HAMILTON COUNTY SCHOOLS

3074 Hickory Valley Road
Chattanooga, TN 37421

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

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

Date: **January 15, 2026**

Subject: Field Trips

Board Agenda Category:

- ☐ Consent Agenda
- ☐ Action Item
- ☐ Reports and Information

#1. **CSAS Upper School** - Eight 9th-12th grade Band students will travel to The Park Vista in Gatlinburg, Tennessee February 5-7, 2026 to participate in the ETSBOA All East Clinic.

#2. **Red Bank High School** - Ten 9th-12th grade Band students will travel to The Park Vista in Gatlinburg, Tennessee February 5-7, 2026 to participate in the ETSBOA All East Clinic.

#3. **Red Bank High School** - Forty-Three 8th-12th grade Army JROTC students will travel to North Hardin High School in Radcliff, Kentucky March 13-15, 2026 to participate in the 7th Brigade JROTC Championships.

#4. **Signal Mountain Middle/High School** - Twenty 9th-12th grade Band students will travel to The Park Vista in Gatlinburg, Tennessee February 5-7, 2026 to participate in the ETSBOA All East Clinic.

#5. **Signal Mountain Middle/High School** - Eleven 9th-12th grade Band students will travel to The Park Vista in Gatlinburg, Tennessee February 5-7, 2026 to participate in the ETSBOA All East Clinic.

#6*. **CSAS Upper School** - Thirteen 9th-12th grade Boys Basketball students traveled to Panama City Beach, Florida December 26-30, 2025 to compete in the Marlin Christmas Classic High School Boys Basketball Tournament.

#7*. **Center for Creative Arts School** - Eighty-Five 8th grade students will travel to Washington, DC May 21-25, 2026 to take part of the World Strides 250 Years of America Tours.

Opportunity 2030 Commitment Connection

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

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 12/01/25 10:47 AM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School CSAS - Upper Grade/Group/Team 9-12/Band

Departure Date/Time 02/05/26 8:00 AM Return Date/Time 02/07/26 4:00 PM

Event/Venue ETSBOA All-East Clinic/The Park Vista Address 705 Cherokee Orchard Rd, Gatlinburg, TN 37738

Instructional value Students will be working with world class clinicians to perform a concert at the event of the event

Evaluation Concert Performance

Fee Requested $ 200.00 How Acquired? Student/Parent

Total # of Students 8 Total # of Staff 4 Total # of Chaperones 0 Nurse Required: No

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

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

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

☐ Other:
☐ County School Bus Cost $ Bus # Driver's Name
☐ Handicap Accessible Bus Cost $
☑ Charter Bus (**Board Approved**) Nooga Shuttles Inc Cost $ $1,600.00
☐ Cars List Driver(s) Cost $

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

List Chaperones:

Staff: James Albertson, Kenzie Hammond, Torey Hart, Wimberly Kennedy

Chaperones:

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

*Overnight Field Trips

*Number of students not attending for economic reasons 0

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

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

*Projects students have undertaken to secure funds 0

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

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

Teacher Name: James Albertson Date Submitted: 12/01/25 10:47 AM

Secretary Name & Approval: KIMBERLY ROGERS Approved - Secretary 12/02/25

Principal's Name & Approval: CHRISTIN CARLISLE Approved - Principal 12/02/25

Director Admin Name & Approval:

Director Name & Approval:

LC Super Admin Name & Approval: PAMELA KILGORE Approved - LC Assistant 12/15/25

LC Super Name & Approval: DAVID HARWOOD Approved - LC Superintendent 12/15/25

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 12/17/25 9:11 AM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School Red Bank High Grade/Group/Team 9-12 Band

Departure Date/Time 02/05/26 8:00AM Return Date/Time 02/07/26 5:00PM

Event/Venue All-State East Sr. Clinic/ Park Vista Hotel Address 705 Cherokee Orchard Rd, Gatlinburg, TN 37738

Instructional value Students will participate in an honor band with other top musicians from the east Tennessee region.

Evaluation They will have a public performance on the last day of the event.

Fee Requested $ 0.00 How Acquired? N/A

Total # of Students 10 Total # of Staff 2 Total # of Chaperones 0 Nurse Required: No

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

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

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

☐ Other: _____

☐ County School Bus Cost $_____ Bus # _____ Driver's Name _____

☐ Handicap Accessible Bus Cost $_____

☑ Charter Bus (**Board Approved**) Nooga Shuttles Inc Cost $ 1600

☐ Cars List Driver(s) _____ Cost $_____

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

List Chaperones:

Staff: Wimberly Kennedy & Zachary Schmidt

Chaperones: _____

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

***Overnight Field Trips**

*Number of students not attending for economic reasons 0

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

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

*Projects students have undertaken to secure funds Band Fees

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

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

Teacher Name: Wimberly Kennedy Date Submitted: 12/17/25 9:11 AM

Secretary Name & Approval: JOY ELLIS Approved - Secretary 12/18/25

Principal's Name & Approval: CHRISTOPHER TILLETT Approved - Principal 12/18/25

Director Admin Name & Approval: _____

Director Name & Approval: _____

LC Super Admin Name & Approval: PAMELA KILGORE Approved - LC Assistant 12/18/25

LC Super Name & Approval: DAVID HARWOOD Approved - LC Superintendent 12/18/25

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 12/18/25 8:11 AM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School Red Bank High Grade/Group/Team 8 - 12 / Army JROTC

Departure Date/Time 03/13/26 8 am Return Date/Time 03/15/26 7 pm

Event/Venue 7th Brigade JROTC Championships / North Hardin High School Address 801 S Logsdon Pkwy, Radcliff, KY 40160

Instructional value Leadership, drill, teamwork

Evaluation on-site

Fee Requested $ 0.00 How Acquired? N/A

Total # of Students 43 Total # of Staff 4 Total # of Chaperones 2 Nurse Required: No

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

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

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

☐ Other: _____

☑ County School Bus Cost $ $3000 (cost covered by Cadet Command) Bus # 11 Driver's Name Jeritt Kelly

☐ Handicap Accessible Bus Cost $_____

☐ Charter Bus (**Board Approved**) _____ Cost $_____

☐ Cars List Driver(s) _____ Cost $_____

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

List Chaperones:

Staff: MAJ(R) John Simpson, 1SG(R) Chris Lafever, 1SG(R) Aaron Russell, Crystal Emory

Chaperones: Niccole Russell, Jerome Dausman

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

***Overnight Field Trips**

*Number of students not attending for economic reasons 0

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

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

*Projects students have undertaken to secure funds 0

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

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

Teacher Name: MAJ John Simpson Date Submitted: 12/18/25 8:11 AM

Secretary Name & Approval:	JOY ELLIS	Approved - Secretary	12/18/25
Principal's Name & Approval:	CHRISTOPHER TILLETT	Approved - Principal	12/18/25
Director Admin Name & Approval:			
Director Name & Approval:			
LC Super Admin Name & Approval:	PAMELA KILGORE	Approved - LC Assistant	12/18/25
LC Super Name & Approval:	DAVID HARWOOD	Approved - LC Superintendent	12/18/25

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 12/19/25 9:10 AM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School Sign Mountain Middle/High Grade/Group/Team 9-12 Band

Departure Date/Time 02/05/26 8:00 AM Return Date/Time 02/07/26 11:00 PM

Event/Venue ETSBOA All-East Honor Band/Park Vista Hotel Gatlinburg, TN Address 705 Cherokee Orchard Rd, Gatlinburg, TN

Instructional value Honor Band Clinic/Performance

Evaluation Student performance and reflection

Fee Requested $ 150.00 How Acquired? Student/Parent

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

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

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

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

☐ Other:
☐ County School Bus Cost $ Bus # Driver's Name
☐ Handicap Accessible Bus Cost $
☑ Charter Bus (**Board Approved**) Nooga Shuttles Inc Cost $ 20
☑ Cars List Driver(s) Parent responsible for student's return transporation Cost $ 0

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

List Chaperones:

Staff: Trevor Hayes, Shelby Walker, Molly Epperson

Chaperones:

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

*Overnight Field Trips

*Number of students not attending for economic reasons 0

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

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

*Projects students have undertaken to secure funds N/A

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

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

Teacher Name: Hayes, Trevor Date Submitted: 12/19/25 9:10 AM

Secretary Name & Approval:	DEBBIE PRICE	Approved - Secretary	12/19/25
Principal's Name & Approval:	MICHAEL CARSON	Approved - Principal	12/19/25
Director Admin Name & Approval:			
Director Name & Approval:			
LC Super Admin Name & Approval:	PAMELA KILGORE	Approved - LC Assistant	12/29/25
LC Super Name & Approval:	DAVID HARWOOD	Approved - LC Superintendent	12/29/25

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 12/19/25 10:18 AM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School Sign Mountain Middle/High Grade/Group/Team HS Orchestra

Departure Date/Time 02/05/26 9:00 am Return Date/Time 02/07/26 5:00 PM

Event/Venue All East Clinic / Park Vista Hotel Address 705 Cherokee Orchard Rd Gatlinburg, TN 37738 United States

Instructional value It will allow students to challenge themselves through musical competitiveness, as well as be with a group of passionate and dedicated young musicians. They will also be led by professional and qualified clinicians from around the US.

Evaluation Their evaluation will take place on the last day during their performance at the Park Vista

Fee Requested $ 25.00 How Acquired? Student/Parent

Total # of Students 11 Total # of Staff 1 Total # of Chaperones 1 Nurse Required: No

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

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

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

☐ Other:
☐ County School Bus Cost $ Bus # Driver's Name
☐ Handicap Accessible Bus Cost $
☑ Charter Bus (**Board Approved**) Nooga Shuttles Inc Cost $ 20 per student
☐ Cars List Driver(s) Cost $

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

List Chaperones:

Staff: Colton Brown

Chaperones: Wimberly Kennedy (HCS Staff for Redbank HS)

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

***Overnight Field Trips**

*Number of students not attending for economic reasons 0

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

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

*Projects students have undertaken to secure funds 0

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

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

Teacher Name: Colton Brown Date Submitted: 12/19/25 10:18 AM

Secretary Name & Approval:	DEBBIE PRICE	Approved - Secretary	12/19/25
Principal's Name & Approval:	MICHAEL CARSON	Approved - Principal	12/19/25
Director Admin Name & Approval:			
Director Name & Approval:			
LC Super Admin Name & Approval:	PAMELA KILGORE	Approved - LC Assistant	12/29/25
LC Super Name & Approval:	DAVID HARWOOD	Approved - LC Superintendent	12/29/25

Docusign Envelope ID: 0CC213EE-93D5-495A-B6D9-BD87CB3EBD64

Hamilton County Schools
3074 Hickory Valley Road
Chattanooga, Tennessee 37421

Request for Early Approval

MEMORANDUM

To: Executive Committee of the Board

School: CSAS Upper

Date: 12/10/25 Trip Dates: ~~12/26/25~~ Insert text here 12/30/

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

I just received official confirmation for our team's lodging needs this week that is vendor approved. We also just finalized our roster for varsity and the number of rooms in the group block. I apologize and will ensure all field trip details are finalized months in advance going forward.

Principal Signature — Date: 12/11/2025

DocuSigned by:
F208EEDFA17A4E8...
Deputy Superintendent — Date: 12/18/2025

APPROVED:

Signed by:
Dr. Justin Robertson
4D76312655B0468...
Superintendent Signature — Date: 12/18/2025

DS
SM

Signed by:
Joe Smith
A11684F245CB4D0...
Board Chairman Signature — Date: 12/18/2025

Rev. 4/2022 (MA)

Docusign Envelope ID: 0CC213EE-93D5-495A-B6D9-BD87CB3EBD64

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 12/10/25 4:02 PM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School CSAS - Upper Grade/Group/Team High School Boys Basketball

Departure Date/Time 12/26/25 8:00AM Return Date/Time 12/30/25 8:00PM

Event/Venue Arnold High School Gymnasium Address 550 N Alf Coleman Rd, Panama City Beach, FL, 32407

Instructional value High School Boys Basketball Tournament "Marlin Christmas Classic."

Evaluation High School Athletics Competition

Fee Requested $ 100.00 How Acquired? Student/Parent

Total # of Students 13 Total # of Staff 2 Total # of Chaperones 3 Nurse Required: No

Number of subs needed 0 Funding source for subs

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

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

☐ Other:
☐ County School Bus Cost $ Bus # Driver's Name
☐ Handicap Accessible Bus Cost $
☐ Charter Bus (**Board Approved**) Cost $
☑ Cars List Driver(s) Student parents driving their own student, Jeremy Henderson, Fred Wright, Todd Lansden, Miles Thomas, Christin Carlisle Cost $ 0

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

List Chaperones:

Staff: William Henderson and Christin Carlisle

Chaperones: Fred Wright, Miles Thomas, and Todd Lansden

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

*Overnight Field Trips

*Number of students not attending for economic reasons 0

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

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

*Projects students have undertaken to secure funds 1

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

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

Teacher Name: William Jeremy Henderson Date Submitted: 12/10/25 4:02 PM

Secretary Name & Approval:	KIMBERLY ROGERS	Approved - Secretary	12/11/25
Principal's Name & Approval:	CHRISTIN CARLISLE	Approved - Principal	12/11/25
Director Admin Name & Approval:			
Director Name & Approval:			
LC Super Admin Name & Approval:	PAMELA KILGORE	Approved - LC Assistant	12/17/25
LC Super Name & Approval:	DAVID HARWOOD	Approved - LC Superintendent	12/17/25

Docusign Envelope ID: E5D9D94F-3481-4C5C-8697-2902B23E8FA0

Hamilton County Schools
3074 Hickory Valley Road
Chattanooga, Tennessee 37421

Request for Early Approval

MEMORANDUM

To: Executive Committee of the Board

School: CCA

Date: 12/15/25 Trip Dates: 5/21-5/25

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

There was a communications issue with dates on the field trip portal.

Principal Signature — Date: 12/15/25

DocuSigned by: F208EEDFA17A4E8...
Deputy Superintendent — Date: 12/17/2025

APPROVED:

Signed by: Dr. Justin Robertson 4D76312655B6468...
Superintendent Signature — Date: 12/17/2025

DS SM

Signed by: Joe Smith A11684E245B840D...
Board Chairman Signature — Date: 12/17/2025

Rev. 4/2022 (MA)

Docusign Envelope ID: E5D9D94F-3481-4C5C-8697-2902B23E8FA0

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 11/17/25 4:40 PM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School Center for Creative Arts Grade/Group/Team 8th Grade

Departure Date/Time 05/21/26 7:00 AM Return Date/Time 05/25/26 10:00 PM

Event/Venue World Strides 250 Years of America Tour of Washington, D.C. Address Washington Marriott Capitol Hill, 175 L Street NE, Washington, DC 20002

Instructional value We will tour landmarks and museums with direct connections to 8th grade standards and content in ELA, science, and social studies.

Evaluation Students will participate in guided tours and discussions at each stop on the tour.

Fee Requested $ 1500.00 How Acquired? Student/Parent

Total # of Students 85 Total # of Staff 11 Total # of Chaperones 0 Nurse Required: No

Number of subs needed 0 Funding source for subs

- Total # of Students with 504 Plan 10 Modifications Needed 0
- Total # of Students with Disabilities 8 Modifications Needed Our exceptional education assistant will travel with us to support one student specifically.

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

☐ Other:
☐ County School Bus Cost $ Bus # Driver's Name
☐ Handicap Accessible Bus Cost $
☑ Charter Bus (**Board Approved**) Premier Transportation Cost $
☐ Cars List Driver(s) Cost $

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

List Chaperones:

Staff: Jessica Ghazi, Heather Brown, Kristen Hernandez, Emma Phelan, Matt Jorgenson, Jennifer Ledford, JB Copeland, Janet Eppoliti, Charundeep Uppal, Ashley Lewis, Shelia DeFilippis

Chaperones:

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

***Overnight Field Trips**

*Number of students not attending for economic reasons 20

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

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

*Projects students have undertaken to secure funds 0

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

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

Teacher Name: Heather Brown Date Submitted: 11/17/25 4:40 PM

Secretary Name & Approval:	REGINA BRANTLEY	Approved - Secretary	11/21/25
Principal's Name & Approval:	JILL LEVINE	Approved - Principal	11/21/25
Director Admin Name & Approval:			
Director Name & Approval:			
LC Super Admin Name & Approval:	PAMELA KILGORE	Approved - LC Assistant	12/15/25
LC Super Name & Approval:	DAVID HARWOOD	Approved - LC Superintendent	12/15/25

HAMILTON COUNTY SCHOOLS

3074 Hickory Valley Road
Chattanooga, TN 37421

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

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

Date: **January 15, 2026**

Subject: Overnight Field Trips

Board Agenda Category:

- ☐ Consent Agenda
- ☐ Action Item
- ☐ Reports and Information

#1*. **Tyner Academy School** - Thirteen high school Varsity Basketball students traveled to Memphis, Tennessee December 18-21, 2025 to participate in the Terry Tippett Invitational Tournament.

Opportunity 2030 Commitment Connection

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

Docusign Envelope ID: 1B7E739C-FF3A-4DE8-8439-D7331E865557

Hamilton County Department of Education
3074 Hickory Valley Road
Chattanooga, Tennessee 37421

Request for Early Approval

MEMORANDUM

To: Executive Committee of the Board

School: Tyner Middle High Academy

Date: 12/15/2025 Trip Dates: 12/18/25-12/21/2025

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

The opportunity to participate in this tournament recently became open to our team as a result of another team no longer being able to participate.

Principal Signature — Date: 12/15/25

DocuSigned by:
F208EEDFA17A4E8...
Asst. Superintendent Signature — Date: 12/17/2025

APPROVED:

Signed by:
Dr. Justin Robertson
4D70312655B0468...
Superintendent Signature — **Date:** 12/17/2025

DS
SM

Signed by:
Joe Smith
A1168E243B840D...
Board Chairman Signature — **Date:** 12/17/2025

Docusign Envelope ID: 1B7E739C-FF3A-4DE8-8439-D7331E865557

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 12/15/25 3:51 PM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School Tyner Mid High Academy Grade/Group/Team High School Varsity Basketball Team

Departure Date/Time 12/18/25 3:00pm Return Date/Time 12/21/25 10:00pm

Event/Venue Terry Tippett Invitational Tournament Address 514 South Perkins Rd Memphis, TN 38117

Instructional value Tournament provide multiple high intensity games build better habits and sharpen fundamentals through reps and adversity.

Evaluation n/a

Fee Requested $ 0.00 How Acquired? N/A

Total # of Students 13 Total # of Staff 2 Total # of Chaperones 1 Nurse Required: No

Number of subs needed 0 Funding source for subs

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

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

☐ Other:
☐ County School Bus Cost $ Bus # Driver's Name
☐ Handicap Accessible Bus Cost $
☐ Charter Bus (**Board Approved**) Cost $
☑ Cars List Driver(s) Ejay Ward, Travis Glover, Dontay Hampton Cost $ $400.00

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

List Chaperones:

Staff: Ejay Ward & Travis Glover

Chaperones: Dontay Hampton

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

*Overnight Field Trips

*Number of students not attending for economic reasons 0

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

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

*Projects students have undertaken to secure funds 0

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

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

Teacher Name: Ejay Ward Date Submitted: 12/15/25 3:51 PM

Secretary Name & Approval:	DARLENE BURKES	Approved - Secretary	12/15/25
Principal's Name & Approval:	RASHAAD WILLIAMS	Approved - Principal	12/15/25
Director Admin Name & Approval:			
Director Name & Approval:			
LC Super Admin Name & Approval:	PAMELA KILGORE	Approved - LC Assistant	12/16/25
LC Super Name & Approval:	DR. MARQUES STEWART	Approved - LC Superintendent	12/16/25

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Pkwy
Chattanooga, TN 37421

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

From: Dr. Tiffany Earvin, Community Superintendent
Midtown Learning Community

Date: **January 15 , 2026**

Subject: Overnight Field Trips

Board Agenda Category:

- **X** Consent Agenda
- ☐ Action Item
- ☐ Reports and Information

#1. **The Howard School** - Ten (Wrestling Team) students and two school staff will be traveling to a State Wrestling Tournament at Williamson County Ag Expo Park, in Franklin, Tennessee on February 19 - 21, 2026, for team reinforcement of key character traits such as resilience, self discipline, & determination.

Opportunity 2030 Commitment Connection

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

HAMILTON COUNTY SCHOOLS
Request for Field Trip Approval

Overnight **Day/Overnight** (Must go to Board for Approval) **Today's Date:** 08/29/25 4:01 PM

☑ **Learning Community** ☐ **FRI/CTE** ☐ **Exceptional Ed** ☐ **PreK**

School The Howard School Grade/Group/Team Wrestling Team

Departure Date/Time 02/19/26 6pm Return Date/Time 02/21/26 9pm

Event/Venue State Wrestling Tournament @ Williamson Co. Ag Expo Park Address 4215 Long Ln. Franklin, TN 37064

Instructional value Reinforce character traits of resilience, self discipline and determination

Evaluation Tournament placement

Fee Requested $ 0.00 How Acquired? N/A

Total # of Students 10 Total # of Staff 2 Total # of Chaperones 0 Nurse Required: No

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

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

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

☐ Other: _____
☐ County School Bus Cost $_____ Bus # _____ Driver's Name _____
☐ Handicap Accessible Bus Cost $_____
☐ Charter Bus (**Board Approved**) _____ Cost $_____
☑ Cars List Driver(s) Ramsey Jibrin, Heather Kilgore Cost $ 0

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

List Chaperones:

Staff: Ramsey Jibrin, Heather Kilgore

Chaperones: _____

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

*Overnight Field Trips

*Number of students not attending for economic reasons 0

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

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

*Projects students have undertaken to secure funds Plaque fundraiser

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

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

Teacher Name: Ramsey Jibrin Date Submitted: 08/29/25 4:01 PM

Secretary Name & Approval: JACQUELINE RUTLEDGE Approved - Secretary 09/15/25

Principal's Name & Approval: LEANDREA WARE Approved - Principal 09/17/25

Director Admin Name & Approval: _____

Director Name & Approval: _____

LC Super Admin Name & Approval: BRANDY POWELL Approved - LC Assistant 12/12/25

LC Super Name & Approval: TIFFANY EARVIN Approved - LC Superintendent 12/12/25

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

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

From: Mary Ellen Heuton, Chief Finance Officer
Lindsay Cepero, Director of Procurement

Date: January 15, 2026

Subject: Bids/Contracts

Board Agenda Category:

- ☑ Consent Agenda
- ☐ Action Item
- ☐ Reports and Information

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1. Attached for your approval are for the following:

    A. Award CMAR-RFP 26-14, North River Elementary School Construction Manager at Risk

2. Recommend approval as presented.

Opportunity 2030 Commitment Connection

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

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

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

From: Dr. Robert Sharpe, Chief Operating Officer
Justin Witt, Executive Director of Maintenance

Date: January 15, 2026

RE: Award Request for Proposal RFP File 26-14, North River Elementary School Construction Manager at Risk

Board Agenda Category:

- ☑ Consent Agenda
- ☐ Action Item
- ☐ Reports and Information

Award Request for Proposal No. 26-14, North River Elementary School Construction Manager at Risk, to The Christman Company as Construction Manager at Risk (CMAR) for the North River Elementary School construction project. Approve the commencement of preconstruction services in the amount of $65,000.00 for an estimated preconstruction period of ten (10) months with full construction completion estimated for fall of 2028. Expenditures for preconstruction services will be paid from the budgeted 2024A Bond Fund. Construction services and any Guaranteed Maximum Price (GMP) amendments will be presented to the Board for separate consideration and approval at a later date.

On October 21, 2025, the Procurement Department advertised CMAR-Request for Proposal No. 26-14, seeking a qualified Construction Manager at Risk to provide preconstruction and construction phase services for the new construction of North River Elementary School. The CMAR delivery method was selected to allow for early contractor involvement during design, enhanced cost control, constructability input, and schedule optimization for this complex capital project.

A total of six (6) CMAR proposals were received. Following initial evaluation, four (4) top-ranked firms were invited to participate in oral presentations before the HCS selection committee. Proposals and presentations were evaluated in accordance with the criteria set forth in the solicitation. Based on the evaluation results and the recommendation of the selection committee, The Christman Company was identified as the top-ranked firm and recommended for award.

The Construction Manager at Risk (CMAR) delivery method is structured in phases: an initial preconstruction phase, followed by a construction phase(s) authorized through a Guaranteed Maximum Price (GMP). Approval of this item authorizes preconstruction

services only, including cost estimating, constructability reviews, scheduling, value engineering, and coordination with the design team to advance the project toward construction readiness. Upon completion of the preconstruction phase, the CMAR will submit separate GMP(s) for Board consideration and approval prior to the start of construction services.

Awarding the CMAR and preconstruction services to The Christman Company establishes a collaborative delivery framework that promotes transparent cost development, coordinated scheduling, and early constructability input advancing the North River Elementary School construction project efficiently and strategically.

Attachments:

- Construction Manager at Risk Agreement

Opportunity 2030 Commitment Connection

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

AGREEMENT BETWEEN OWNER
&
CONSTRUCTION MANAGER AT RISK

THIS AGREEMENT, is made by and between HAMILTON COUNTY DEPARTMENT OF EDUCATION, a Local Education Agency (LEA) of the State of Tennessee, hereinafter referred to as "**Owner**," and The Christman Company, a Tennessee Foreign For-profit Corporation formed in Michigan licensed to conduct business in the State of Tennessee, hereinafter referred to as "**CMAR**"

W I T N E S S E T H:

WHEREAS, on or about October 21, 2025, the Owner issued its Solicitation No. 26-14 for North River Elementary School Construction Manager at Risk; and

WHEREAS, the CMAR has timely submitted a proposal in response to the Owner's Request for Proposal, whereby the CMAR has offered to provide construction management services in accordance with the request contained in Owner's Request for Proposal; and

WHEREAS, the Owner selected and designated The Christman Company to be the Construction Manager at Risk for the Request for Proposal 26-14, North River Elementary School Construction Manager at Risk, hereinafter, **"PROJECT**," subject to the negotiation, preparation, approval and execution of a definitive agreement between Owner and CMAR; and

WHEREAS, the Owner and CMAR are desirous of entering into such a definitive agreement pursuant to which CMAR will provide construction management services, all as more fully set forth herein;

NOW THEREFORE, in consideration of the mutual promises and covenants contained herein, the parties hereby agree as follows:

ARTICLE 1.
EXTENT OF AGREEMENT; DEFINITIONS

1.01 Agreement. This **PROJECT** is comprised of two distinct parts identified as follows; (1) Phase 1 - Preconstruction Services (Exhibit C); (2) Phase 2 – Construction Services (to be established in a separate amendment). All phases, including preconstruction services and architect-engineering services, may not exceed the total Hamilton County Department of Education Project Budget established by the Hamilton County Department of Education. The CMAR accepts the relationship of trust and confidence established between it and the Owner by this Agreement. The CMAR covenants with the Owner to furnish its skill and judgment as a Construction Manager at Risk and General Contractor with specific expertise in the planning and construction of the **PROJECT** and to cooperate with the Owner and the Owner's representatives, including specifically the Project Architect-Engineer (hereinafter referred to as "AE"), in furthering the interests of the Owner. The CMAR agrees to furnish efficient business administration and superintendence and use its best efforts to complete the **PROJECT** in the best and most expeditious and economical manner, consistent with the interests of the Owner. The CMAR agrees to provide the services required by this Agreement to complete such

services consistent with the Owner's direction, the approved program, and the terms of this Agreement, in accordance with a standard of care which is ordinarily exercised by other construction managers and general contractors in similar circumstances.

1.02 Construction Team. The CMAR, Owner and AE shall be called the "Construction Team" and shall work together as a team from the date established by the Notice to Proceed through construction completion. The CMAR and AE shall work jointly during the preconstruction design phase and through final construction completion and shall be available thereafter should additional services be required. The CMAR shall provide leadership to the Construction Team on all matters relating to construction. The CMAR understands, acknowledges and agrees that the AE shall provide leadership to the Construction Team on all matters relating to design and engineering.

1.03 Extent of Agreement. This agreement for Construction Management Services for the **PROJECT** represents the entire agreement between the Owner and the CMAR and supersedes any prior negotiations, representations or agreements. This Agreement shall not be superseded by any provisions of the Project Plans and Specifications and may be amended only by written instrument signed by both Owner and CMAR. This Agreement is intended to be consistent with and implement the approved program for the **PROJECT** as set forth and further defined in that certain agreement between Owner, Hamilton County Government and AE dated January 31, 2025.

1.04 Definitions. As used in this Agreement, the words and phrases described in Exhibit A attached hereto and incorporated herein, shall have the meanings as set forth in that Exhibit A.

1.05 Use of Words and Phrases. Words of the masculine gender shall be deemed and construed to include correlative words of the feminine and neuter genders. Unless the context shall otherwise indicate, the singular shall include the plural as well as the singular number, and the word "person" shall include corporations and associations, including public bodies, as well as natural persons. "Herein," "hereby," "hereunder," "hereof," "herein- before," and "hereinafter" and other equivalent words refer to this Agreement and not solely to the particular portion thereof in which any such word is used.

ARTICLE 2.
PURPOSE; PROPOSAL; SCHEDULE

2.01 Purpose. The purpose of this Agreement is to provide for the provision of Construction Management Services for the **PROJECT** by the CMAR, and construction of the **PROJECT** by the CMAR in accordance with the Project Plans and Specifications. The further purpose of this Agreement is to define and delineate the responsibilities and obligations of the parties to this Agreement and to express the desire of all such parties to cooperate together to accomplish the purposes and expectations of this Agreement.

2.02 Response to Request for Proposal. CMAR's Response to the Request for Proposal for Construction Management Services submitted by CMAR to Owner is hereby found to be consistent with and in conformance with the provisions of Owner's Request for Proposal No. 26-14., and is in the best interests of the Hamilton County Department of Education. It is the intent of the parties that the CMAR's Response to the Request for Proposal for Construction Management Services be implemented pursuant to this Agreement, and, therefore, such Response is hereby merged into and is effectuated by this Agreement. Reference is hereby made to the response to the Request for Proposal for Construction Management at Risk Services submitted by CMAR to the Hamilton County Department of Education, as well as any supplementary representations and statements furnished by CMAR to Owner during the CMAR selection process. The parties acknowledge that the representations and statements or information contained therein have been relied upon by the Owner and have resulted in the selection of CMAR as the construction manager for this **PROJECT**. However, Owner acknowledges

that the terms and conditions for the performance of the CMAR and for the provision of its services are solely as contained within this Agreement.

2.03 Project Schedule. The development and equipping of the **PROJECT** shall be undertaken and completed in accordance with the Project Schedule. The construction services portion of the Project Schedule may be amended, revised and supplemented, and may thereafter be revised from time to time by and in the reasonable good faith discretion of the CMAR and AE, which revision shall be effective upon receipt by the Owner of a written notice of revision, provided, however, that absent an event of Force Majeure or a revision to the Project Schedule authorized by the execution of a Change Order, no revision to the Project Schedule which extends the preconstruction phase or the Project Substantial Completion Date shall be effective without the prior written approval of the Owner.

ARTICLE 3.
COMPENSATION

3.01 CMAR'S Compensation. The Owner agrees to pay to the CMAR as compensation for all of its services and work provided for hereunder, including preconstruction and construction services. The fee for preconstruction services, as provided in Exhibit C, is sixty-five thousand dollars (**$65,000),** and the sum of a CMAR fee to be negotiated at the time GMP* is established for Construction Services, as provided for in Exhibit B.
*The GMP will be established in a separate amendment to this Agreement.

(1) Preconstruction Services (Exhibit C) shall be payable as follows: The Owner shall compensate the CMAR for preconstruction services in **ten (10)** equal monthly installments of six thousand and five dollars (**$6,500)** each, for a total preconstruction fee of sixty-five thousand dollars (**$65,000)**. Each installment shall be invoiced monthly and shall be due within thirty (30) days of the Owner's receipt of a proper invoice (Net 30). The compensation set forth in this paragraph is designed to pay CMAR for its services rendered in connection with the preconstruction design phase of the **PROJECT**. If at any time during the preconstruction design phase, it can reasonably be concluded that CMAR's services are not being provided in accordance with the schedule of preconstruction services, CMAR shall be reimbursed based upon a percentage of the services performed during the prior month.

(2) CMAR fee. Not more often than once a month, and on a date established at the Project Pre-Construction Conference, the CMAR will submit to the Project Manager for review the pay application form with associated schedule of values. This form shall be filled out and signed by the CMAR covering the Work-In-Place as of the date of the Application and supported by such data as the Project Manager may reasonably require. In the event that the Project Substantial Completion Date occurs prior to expiration of the construction phase period as set forth in the Project Schedule, the entire remaining balance due under the terms of this Subparagraph (2) shall be due and payable on the Punch List Completion Date.

(3) Reimbursable Project Costs. Based on application for payment for the actual cost of work completed, submitted monthly, itemized to correspond to the basis of compensation as set forth in Exhibit B and Article 6.03, including supportive documentation.

3.02 The Project; Changes in the Project; Additional Fee. The Project is as established by the Owner and AE in that certain construction document entitled (Job No. 24-081) North River Elementary School Architectural Schematic Design ("Schematic Design"). If the Project GMP is increased by Owner, the CMAR shall be entitled to receive an additional fee **to be negotiated and established by the Parties, in writing, at the time of such increase to the GMP.** Payment of CMAR's additional fee shall be made in equal monthly installments calculated by dividing the additional fee by the months remaining in the construction phase of the Project schedule. Upon completion of the additional work and final

payment to the subcontractors, the actual cost of such additional work shall be established and any adjustment in the fees paid to CMAR shall be made between Owner and CMAR. As an incentive for the CMAR to diligently pursue cost reducing alternatives, no reduction in CMAR fee below the amount set in Article 3.01 will occur as a result of project cost savings including those resulting from recommendations of the CMAR.

3.03 Period of Construction; Additional Fee. Owner, AE and CMAR expect and believe that the period of construction or construction phase for the **PROJECT** shall be ***(to be established with Phase 2 amendment)*** calendar days to **substantial completion** and ***(to be established with Phase 2 amendment)***, calendar days to **final completion**.

Pre-Construction Phase Services shall be completed within **10 months** of the date specified in the Pre-Construction Notice to Proceed.

***First Construction GMP payment and the subsequent monthly installments to be determined after the GMP has been established with Phase 2 amendment.**

In the event that the construction schedule is extended by agreement of Owner and CMAR due to changes in the **PROJECT** requested by Owner, CMAR shall be entitled to additional CMAR fee as negotiated in the GMP Amendment less any fee increase as calculated in Section 3.02 for work resulting in the subject increase in construction period. Provided, however, CMAR shall not be entitled to receive any portion of such additional compensation to the extent that the delay in performance results from acts of commission, omission, negligence, or fault of the CMAR, its agents or employees.

3.04 Project Costs. Project Costs shall mean all costs incurred by the Owner and CMAR in planning, constructing and equipping the **PROJECT**, in accordance with the Project Plans and Specifications all of which Project Costs shall be paid by the Owner, all of which Project Costs shall be included within the GMP established by CMAR and are more specifically described in Exhibit B.

3.05 Items and Expenses Included in CMAR's Compensation. Except as specifically set forth in Paragraphs 3.03 and 3.04 above, CMAR's compensation includes full payment for services set forth in this Agreement, including but not limited to salaries or other compensation of CMAR's officers, partners and/or employees; general operating expenses incurred by CMAR and relating to this **PROJECT**, including the cost of management, supervision and data processing staff, job office equipment and supplies, and other similar items as shown in Exhibit B, Part I, and necessary for CMAR to perform its services hereunder, specifically excluding any items described on Exhibit B, Part II, attached hereto and incorporated herein, and including overhead and profit.

ARTICLE 4.
CONSTRUCTION MANAGER'S RESPONSIBILITIES AND SERVICES

4.01 All documentation is required to be submitted digitally to the Owner Project Manager.

4.02 Project Management Information System. Commencing immediately following the date established by the Notice to Proceed, the CMAR shall implement and shall utilize throughout the life of this Agreement all subsystems of the Project Management Information System hereinafter referred to as "PMIS." The reports, documents and data to be provided through PMIS shall represent an accurate assessment of the current status of the **PROJECT** and of the work remaining to be accomplished and it shall provide a sound basis for identifying variances and problems and for making management decisions. It shall be prepared and furnished to the Owner and the AE monthly and shall accompany each pay request. If requested by the Owner, the CMAR shall conduct a comprehensive workshop in Hamilton County, TN, for participants designated by the Owner and such additional seminars as are

required to provide instruction. The workshop and the seminars shall facilitate each participant's and the Owner's representatives' use and understanding of PMIS. The PMIS shall be described in terms of the following major subsystems:

(1) Narrative Reporting. The CMAR shall prepare written reports as described hereunder. All such reports shall be in 8-2" x 11" or other convenient format. Copies shall be maintained at the Project Site and transmitted to the Owner and the AE. A bound copy of the complete narrative report shall be submitted to the Owner at the conclusion of the **PROJECT**. The narrative reporting subsystem shall include the following reports:

(a) A monthly executive summary which provides an overview of current and outstanding issues and pending decisions, primary party responsible for the decision, future developments and expected achievements, and any problems or delays, including code violations found by the Permitting Authority.

(b) A monthly cost narrative describing the current construction cost estimate and status of the **PROJECT**.

(c) A monthly scheduling narrative summarizing the current status of the overall Project Schedule. This report shall include an analysis of the various Project Schedules, a description of the critical path, and the analysis as necessary to compare planned performance with actual performance.

(d) A monthly accounting narrative describing the current actual cost and payment status of the **PROJECT** with supporting document. This report shall relate current encumbrances and expenditures to the budget allocations.

(e) A monthly construction progress report during the construction phase summarizing the work of the various subcontractors. This report shall include information from the weekly job site meetings as applicable such as general conditions, long lead supplies, current deliveries, safety and labor relations programs, permits, construction problems and recommendations and plans for the succeeding month.

(f) A daily construction diary during the construction phase describing events and conditions on the project site.

(2) Schedule Control. As soon as reasonably possible following execution of this Agreement, but not later than thirty (30) calendar days following full execution hereof, the CMAR shall prepare a Project Schedule using the critical path method, establishing a detailed schedule for preconstruction services, construction and Owner occupancy of the **PROJECT**, subject to review of Owner and AE, and approval or rejection by Owner within thirty (30) calendar days of delivery to Owner. The Project Schedule shall include a scheduled Construction Commencement Date and Project Substantial Completion Date, which dates shall accommodate known or reasonably anticipated geographic, atmospheric and weather conditions. The Project Schedule will serve as the framework for the subsequent development of all detailed schedules. The Project Schedule shall be produced and updated monthly throughout the **PROJECT**. In a manner consistent with the Project Schedule the CMAR shall prepare and submit to the AE a construction schedule in quadruplicate graphically depicting the activities contemplated to occur as a necessary incident to performance of the work required to complete the **PROJECT**, showing the sequence in which the CMAR proposes for each such activity to occur as a necessary incident to performance of the work required to complete such activity to occur and duration (dates of commencement and completion, respectively) of each such activity. The AE shall determine whether the construction schedule delivered and submitted by the CMAR meets the requirements stated above and whether the construction schedule is consistent with the Project

Schedule. Following development and submittal of the construction schedule, the CMAR shall, at the end of each calendar month occurring thereafter during the period of time required to finally complete the **PROJECT**, or at such earlier intervals as circumstances may require, update and/or revise the construction schedule to show the actual progress of the work performed and the occurrence of all events which have affected the progress of performance of the work already performed or will affect the progress of the performance of the work yet to be performed in contrast with the planned progress of performance of such work, as depicted on the original construction schedule and all updates and/or revisions thereto as reflected in the updated and/or revised construction schedule last submitted prior to submittal of each such monthly update and revision. Each such update and/or revision to the construction schedule shall be submitted to the Owner and AE in duplicate. The CMAR shall prepare and incorporate into the schedule data base, at the required intervals, the following schedules.

(a) The CMAR shall prepare a construction schedule for work encompassed in each bid package. The schedule shall be sufficiently detailed as to be suitable for inclusion in the bid package as a framework for contract completion by the successful bidder. It shall show the interrelationships between the work of the successful bidder and that of other subcontractors, and shall establish initial completion objectives keyed to the Project Schedule.

(b) Upon the award of each subcontract, the CMAR shall jointly with the subcontractor, develop a schedule which is more detailed than the original construction schedule included in the specifications, taking into account the work schedule of the other subcontractors. The construction schedule shall include as many activities as necessary to make the schedule an effective tool for construction planning and for monitoring the performance of the subcontractor. The construction schedule shall also show pertinent activities for material purchase orders, manpower supply, shop drawing schedules and material delivery schedules.

(c) The CMAR shall jointly develop with the AE and Owner a detailed plan, inclusive of punch lists, final inspections, maintenance training and turn over procedures, to be used for ensuring accomplishment of a smooth and phased transition from construction to Owner occupancy. The occupancy schedule shall be produced and updated monthly from its inception through final Owner occupancy.

(3) Work by Others. The Owner may perform additional Work related to the **PROJECT** by itself, or it may let other direct contracts which shall contain General Conditions similar to these.

The CMAR will afford the other Contractors who are parties to such direct contracts (or the Owner, if it is performing the additional Work itself), reasonable opportunity for the introduction and storage of materials and equipment and the execution of the Work, and shall properly connect and coordinate his work with theirs. Should the Contract entail relocation of facilities not a part of this Contract, the CMAR will coordinate and cooperate with the applicable entity responsible for this portion of the work.

(4) Cost Control. The operation of this subsystem shall provide sufficient timely data and detail to permit the Construction Team to control and adjust the **PROJECT** requirements, needs, materials, equipment and systems by building and site elements so that construction will be completed at a cost which, together with all Project Costs, will not exceed the Project Budget. Based upon a quantitative material take off with current local costs for each bid group by subcontract package, within a reasonable time period as determined by the Owner in the Owner's sole discretion, the CMAR shall provide its estimate of the total Project Costs for the PROJECT. These costs will be detailed by line item budget with a cost corresponding to each of the following stages or phases:

(a) At completion of the Schematic Design.

(b) At completion of the Design Development Phase.

(c) At completion of 50% of the Construction Documents Phase.

(d) At completion of 100% of the Construction Documents Phase.

(e) At establishment of the Guaranteed Maximum Price (GMP).

(5) Project Accounting. The operation of this subsystem shall enable the Construction Team to plan effectively and to monitor and control the funds available for the **PROJECT**, including information relating to cash flow, costs, change orders, payments and other major financial factors by comparison of budget, estimate, total commitment, amounts invoiced and amounts payable. A schedule of values for each line item in the Project budget shall be integrated into the Project accounting contemplated by this paragraph. This subsystem will be produced and updated monthly and accompany each pay request. Project accounting includes the following reports which together will serve as a basic accounting tool and an audit trail:

(a) The budget, estimate, and base commitment (awarded contracts and purchase orders) for any given contract or budget line item. It shall show approved change orders for each contract which when added to the base commitment will become the total commitment. Pending change orders will also be shown to produce the total estimated probable cost to complete the work.

(b) The value in place (both current and cumulative), the amount invoiced (both current and cumulative) and the balance remaining.

(c) The complete activity history of each item in the Project accounting structure. It shall include the budget, estimate, and base commitment figures for each contract. It shall give the change order history including change order numbers, description, proposed, and approved dates and the proposed and approved dollar amounts. It shall also show all pending or rejected change orders.

(d) A cash flow diagram showing the projected accumulation of cash payments against the **PROJECT**. Cash flow projections shall be generated for anticipated monthly payments as well as cumulative payments.

4.03 Design Review and Recommendations and Warranty

(1) Review and Recommendations. Immediately upon the start date established by the Notice to Proceed, CMAR shall familiarize itself thoroughly with the Schematic Design Construction Documents~~,~~ and with the architectural, civil, mechanical, plumbing, electrical, and structural plans and specifications being developed by the AE for the **PROJECT**. CMAR shall follow and/or otherwise review, as appropriate, the development of the design for the **PROJECT** from the Schematic Design presently available up through and including the Construction Document Phase. The CMAR shall make recommendations with respect to the selection of systems and materials and cost reducing alternatives (i.e., value engineering and life cycle cost analysis) including assistance to the AE and Owner in evaluating alternative comparisons versus long-term cost effects. The evaluation shall speak to the benefits of the speed of erection and early completion of the **PROJECT**. The CMAR shall furnish pertinent information as to the availability of materials and labor that will be required. The CMAR shall submit to the Owner, Permitting Authority and AE such comments as may be appropriate concerning construction feasibility and practicality (i.e., constructability analysis). The CMAR shall call to the

Owner's and the AE's attention any known defects in the design, drawings and specifications or other documents.

(2) Review Reports. Within thirty (30) calendar days after receiving the construction documents for each phase of the **PROJECT**, the CMAR shall perform a specific review thereof, focused upon factors of a nature encompassed in paragraph (1) above. Within the same 30-day period, the CMAR shall submit to the Owner and the AE a written report covering suggestions or recommendations previously submitted, additional suggestions or recommendations as the CMAR may deem appropriate, and all actions taken by the AE with respect to same, any comments the CMAR may deem to be appropriate with respect to separating the work into separate contracts, and alternative materials. Prior to establishment of the GMP, CMAR shall warrant to Owner (without assuming any architectural or engineering responsibility) that the Project Plans and Specifications are practical, feasible, and constructible and that the construction of the improvements identified and described in the Project Plans and Specifications may be accomplished within the time frame identified and described in the Project Schedule.

(3) Long Lead Procurement. The CMAR shall review the design for the purpose of identifying long lead procurement items (machinery, equipment, materials, and supplies). When each item is identified, the CMAR shall notify the subcontractors, Owner and the AE of the required procurement and schedule. Such information shall be included in the bid documents and made a part of all affected subcontracts. As soon as the AE has completed drawings and technical specifications and the CMAR has obtained permitting approval, the CMAR shall prepare invitations for bids. Copies shall be supplied to Owner in advance of the invitation to bid for Owner's information and comment. The CMAR shall keep itself informed of the progress of the respective subcontractors or suppliers, manufacturing or fabricating such items and advise Owner and AE of any problems or prospective delay in delivery.

(4) Separate Contracts Planning. The CMAR shall review the design and shall determine how it desires to divide the sequence of construction activities, and will determine the breakdown and composition of bid packages for award, based on the current schedule while the design is being completed and shall supply a copy for Owner for its review and approval. The CMAR shall take into consideration such factors as natural and practical lines of severability, sequencing effectiveness, accesses and availability constraints, total time for completion, construction market conditions, availability of labor and materials, community relations and any other factors pertinent to saving time and cost by overlapping design and construction that are authorized by the Owner. The CMAR will supply the Owner a copy of the schedule for the Owner's information and comment. The CMAR will work in conjunction with the Owner's representatives, including the AE, to ensure that the bid list includes local, small and/or minority businesses.

(5) Interfacing.

(a) The CMAR shall take such measures as are necessary to ensure proper construction and delivery of the **PROJECT**, including but not limited to providing that all construction requirements will be covered in the separate procurement of long lead items, the separate construction subcontracts and the general conditions items performed without duplication or overlap to maintain completion of all work on schedule. Particular attention shall be given to provide that each bid package clearly identifies the work included in that particular separate subcontract, its scheduling for start and completion and its relationship to other separate contractors.

(b) Without assuming any design responsibilities for the AE, the CMAR shall include in the reports comments on overlap with any other separate subcontracts, omissions, lack of correlation between drawings, and any other deficiencies noted, in order that the AE may arrange for necessary corrections.

(6) Job Site Facilities. The CMAR shall arrange for all job site facilities required and necessary to enable the CMAR and AE to perform their respective duties and to accommodate any representatives of the Owner which the Owner may choose to have present on the job, the description of which shall be finalized prior to the establishment of the GMP.

(7) Weather Protection. The CMAR shall ascertain what temporary enclosures of building areas, if any, should be provided for and may be provided in order to assure orderly progress of the work in periods when extreme weather conditions are likely to be experienced. The CMAR shall also be responsible for providing weather protection for work in progress and for materials stored on site.

(8) Market Analysis and Stimulation of Subcontractor Interest.

(a) The purpose of this subsection is to insure that the CMAR makes a genuine effort to stimulate interest in the **PROJECT** and maximize participation of potential qualified subcontractors in the selection process with emphasis placed on recruiting and using local, small and/or minority businesses. The CMAR shall monitor conditions in the construction market to identify factors that will or may affect costs and time for completing the **PROJECT**; and make analysis as necessary to (i) determine and report on availability of labor, materials, equipment, potential subcontractors and possible impact of any shortages or surpluses of labor or material, and (ii) in light of such determination, make recommendations and take action as may be appropriate with respect to long lead procurement, separation of construction into subcontractor packages, sequencing of work, use of alternative materials, equipment or methods, other economies in design or construction and other matters that will promote cost savings and completion within the schedule time.

4.04 Establishment of Guaranteed Maximum Price for Construction. Prior to entering into any subcontracts, the CMAR will establish and submit in writing to the Owner for its approval a Guaranteed Maximum Price, guaranteeing the maximum price to the Owner, for the Project Cost. Such Guaranteed Maximum Price shall only be subject to modification for changes in the **PROJECT** or as otherwise specifically provided for in this Agreement. However, the actual price paid for the work by the Owner shall either be: (1) the actual Project Cost, or (2) the GMP, whichever is the lesser when the work is finally complete. Owner may request and will be provided by CMAR copies of documents relating to the development of Project cost and GMP.

(1) All amounts of monies resulting from actual Project Costs, as described above, totaling less than the GMP shall be and accrue to the benefit of the Owner.

(2) The GMP will include only those applicable taxes in the Project Cost which are legally enacted at the time the GMP is established. Should any applicable taxes be enacted after the GMP then the GMP shall be increased by the same amount. Any increase in cost or time arising from changes in U.S. foreign, trade or other policies or acts, including but not limited to, sanctions, tariffs, trade restrictions, or other governmental actions that affect the availability or cost of materials, equipment, or labor necessary for the completion of the Project is specifically excluded from this [proposal, GMP etc.].

(3) At the time of submission of a Guaranteed Maximum Price, the CMAR will verify the time schedule for activities and work which were adopted by the Construction Team and used to determine the CMAR's GMP.. The CMAR will be required to furnish documentation evidencing proposed expenditures to this contingency prior to written authorization for the release of funds by the Owner. Actual and contemplated expenditures from the contingency shall be displayed monthly in the PMIS. If bids are received below the applicable line items in the GMP, the surplus will be added to the contingency.

The Guaranteed Maximum Price shall include a Construction Manager's Risk Contingency Fund to be negotiated within the GMP. This is to cover the Construction Manager for construction risks only, and is not to be used for Changes in the Project, for Changes as a result of deficiencies or omissions in the drawings and specifications, or to fund additional program or scope of work. Should the Construction Manager's Risk Contingency be used for any of the aforementioned reasons, Owner shall immediately refund the Contingency in full. Typical construction risks are defined as: (i) extended General Conditions Costs due to delays caused by factors outside the Construction Manager's control, that are not considered compensable under the terms of the agreement; (ii) estimate overruns; (iii) errors and omissions, correction of defects in the Work and/or acceleration costs which are the result of the Construction Manager's negligence (provided the Construction Manager has not been grossly negligent or guilty of willful or wanton misconduct, and provided further that the Construction Manager shall be entitled to charge to the Risk Contingency only those amounts payable and shall not be entitled to charge any overhead or profit with respect to corrections of such errors, omissions and defects); (iv) Trade Contractor failures; (v) omissions of detailed or specified items, (vi) any Cost of the Work that is over the GMP and not compensable as a change order, etc.

(4) Upon completion of the Project, all remaining contingency shall be returned to the Owner.

(5) If any bid package consistent with the Project Plans and Specifications for which the lowest price submitted by a subcontractor is in excess of the amount allocated by the CMAR for such bid package (unless Owner through change order changes the Scope of Work and the Guaranteed Maximum Price (GMP)), one of the following may occur: (1) the price of the bid package may be negotiated with the lowest responsible bidder, or (2) at the CMAR's request and expense, and at the Owner's sole option, Owner may require the AE to make certain changes in the Project Plans and Specifications as are necessary to bring that particular package into line, consistent with Owner's program and the Project's financial feasibility, or (3) with the approval of the Owner, funds may be reallocated from the construction contingency within the GMP to pay the difference between the low bid price and the amount allocated for the bid package, but in no case shall such approval serve to increase the GMP of the **PROJECT** without Owner's consent.

4.05 Performance Bond and Labor and Material Payment Bond. Prior to the Construction Commencement Date, the CMAR shall obtain for the benefit of and directed to the Owner, a labor and material payment and performance bond, satisfying the requirements of the Hamilton County Department of Education and Tennessee Code Annotated, covering the faithful performance by the CMAR of its obligations under this Agreement, including but not limited to, the construction of the **PROJECT** on the Project Site, and the payment of all obligations arising thereunder, including all payments to subcontractors, laborers and materialmen (the "Payment and Performance Bond"). The surety selected by the CMAR to provide the Payment and Performance Bond shall be approved by the Owner prior the issuance of such Bond, which approval shall not be unreasonably withheld.

4.06 Construction Phase; Building Permit; Code Inspection.

(1) Building Permit. The CMAR shall pay for all permits. The Owner and AE shall be required to provide such information to the Permitting Authority as is necessary to obtain approval from the Permitting Authority to commence construction prior to beginning construction. The CMAR shall pull the Building Permit, and shall be responsible for delivering and posting the Building Permit at the Project Site prior to the commencement of construction. The Owner and AE shall fully cooperate with the CMAR when and where necessary.

(2) Code Inspections. All projects require detailed code compliance inspection during construction in disciplines determined by the Permitting Authority. These disciplines normally include,

but are not necessarily limited to, structural, mechanical, electrical, plumbing, and general building. The CMAR shall notify the appropriate inspector(s) and the AE's representative, no less than 24 hours in advance that the work is ready for inspection and before the work is covered up. All inspection shall be made for conformance with the applicable ordinances and building codes. Costs for all re-inspections of work found defective and subsequently repaired shall not be included as Project costs and shall be borne by the CMAR or as provided in the contract between CMAR and subcontractor.

(3) CMAR's Staff. The CMAR shall maintain sufficient off-site support staff and competent full-time staff at the Project Site authorized to act on behalf of the CMAR to coordinate, inspect and provide general direction of the work and progress of the subcontractors and the CMAR shall provide no less than those personnel during the respective phases of construction. The CMAR shall not change any of those persons unless mutually agreed to by the Owner and CMAR. In such case, the Owner shall have the right to approval of the qualifications of the replacement personnel. The Owner shall have the right to request to replace the staff at the Project site at any time during the construction. The CMAR shall comply with the CMAR Background Screening Affidavit attached hereto and incorporated herein as Exhibit D.

(4) Lines of Authority. The CMAR shall establish and maintain lines of authority for its personnel and shall provide this information to the Owner and all other affected parties, such as the code inspectors of the Permitting Authority, the subcontractors, and the AE to provide general direction of the work and progress of the various phases and subcontractors. The Owner and AE may attend meetings between the CMAR and his subcontractors.

(5) Schedule Provision - Construction Phase. The CMAR shall continue to provide current scheduling information and provide direction and coordination regarding beginning and finishing dates, responsibilities for performance and the relationships of the CMAR's work to the work of its subcontractors and suppliers to enable them to perform their respective tasks so that the development of construction progresses in a smooth and efficient manner in conformance with the overall Project Schedule. The Project Schedule shall include all phases of procurement, approval of shop drawings, change orders in progress, schedules for change orders, and performance testing requirements. The CMAR shall advise the Owner, its representatives, and the AE of their required participation in any meeting or inspection giving each at least one week notice unless such notice is made impossible by conditions beyond its control. The CMAR shall hold job-site meetings at least biweekly with the Construction Team and at least once each week with the subcontractors and the AE's field representative, or more frequently as required by work progress, to review progress, discuss problems and their solutions and coordinate future work with all subcontractors. The CMAR shall prepare and maintain a record of such meetings and distribute copies as necessary.

(6) Solicitation of Subcontracts. The Owner intends to bid, through the CMAR, all portions of this **PROJECT**.

(a) The CMAR shall prepare all documents for bidding procurement of long lead items, materials and services, and for subcontractor contracts. The solicitation and award process shall be consistent with the requirements of Article 6 hereof.

(b) As part of such bid preparation, the CMAR shall review the specifications and drawings prepared by the AE. Ambiguities, conflicts or lack of clarity of language, use of illegally restrictive requirements, and any other defects in the specifications or in the drawings noted by the CMAR shall be brought to the attention of the Owner and AE in written form.

(c) The CMAR shall, unless waived by Owner, conduct conferences with all prospective subcontractors, for the purpose of reviewing and approving awards. Invited will be the AE,

Owner and Owner's representatives. In the event questions are raised which require an interpretation of the documents or otherwise indicate a need for clarification or correction, the CMAR shall transmit these to the AE and upon receiving clarification or correction in writing shall prepare an amendment to the document and issue same to all of the prospective subcontractors.

(d) Selection and award of subcontracts shall be consistent with Article 6 hereof.

(e) Work by CMAR and/or LEA: in accordance with Tennessee Code Annotated 49-2-203(a)(3)(D)(ii), the CMAR is prohibited from undertaking actual construction work on the PROJECT, except in instances where bids have been solicited twice and no bids have been submitted. If the CMAR can document that a good faith effort was made in each bid solicitation to obtain bids and no bids were received, then the CMAR may perform the construction work at a price agreed upon by the CMAR, the AE and the Owner of the project with written authorization to support such CMAR completion. Further, a school system, at its own discretion, may perform work on the PROJECT with its own employees, and may include the coordination and oversight of this work as part of the services of the CMAR.

(f) Advertisement Timeframe - The CMAR shall publicly advertise the bidding for a period of time not less than the days provided in the schedule below. Such timeframes may only be waived or modified to a lesser time with approval of the Owner's Director of Procurement.

ESTIMATED CONSTRUCTION COSTS	CALENDAR DAYS FOR ADVERTISEMENT
$100,000.00 - $200,000.00	10 DAYS
$200,000.01 - $500,000.00	15 DAYS
$500,000.01 +	2I DAYS

(g) Advertisement Location/Media - The CMAR shall publicly advertise for the period listed above in a regionally circulated newspaper, on a news and information website, and on their company website or through a third-party eProcurement system where available. The advertisement must run at least once in the newspaper prior to the opening date following the above thresholds. The CMAR's advertisement must include the date and time of the submission deadline. The CMAR shall make every effort to receive maximum exposure and therefore receive adequate competition for their advertisement. Sealed bids for actual construction work shall be opened at a public bid opening and the names of the contractors and their bid amounts shall be announced.

(h) Documentation Responsibility - The CMAR shall maintain files that adequately support the competitive solicitation process chosen and followed by the CMAR. At minimum, the CMAR shall provide to the Owner assigned Project Manager a summary bid tabulation depicting all bids received broken down by discipline and clear indication of the selected sub-contractor(s). Should the CMAR not select the lowest bidder in any instance, a written description as to why the lowest bidder was not selected must be provided within the bid tabulation summary.

The bid tabulation summary and the guaranteed maximum price documentation shall be provided to the Owner Project Manager for review. The GMP documentation shall also provide a breakdown of pricing by discipline.

(7) Quality Control. The CMAR shall develop and maintain a program acceptable to the Owner and AE to assure quality control of the construction. The CMAR shall be responsible for and supervise the work of all subcontractors, providing instructions to each when their work does not conform to the requirements of the Project Plans and Specifications and the CMAR shall continue to

coordinate the work of each subcontractor to ensure that corrections are made in a timely manner so as to not affect the efficient progress of the work. Should a disagreement occur between the CMAR and the AE over the acceptability of the work, the Owner, at its sole discretion and in addition to any other remedies provided herein, shall have the right to determine acceptability.

(8) Subcontractor. The CMAR shall solely supervise the subcontractors. The CMAR shall negotiate all change orders and field orders with all affected subcontractors and shall review the costs and advise the Owner and AE of their validity and reasonableness, acting in the Owner's best interest. Before any work is begun on any change order which is to be funded through contingency, approval for use of contingency funds must be secured from Owner and a written authorization from the Owner must be issued. However, when there is an imminent threat to health and safety, and Owner's concurrence is impractical, the CMAR shall act immediately to remove the threats to health and safety and shall subsequently fully inform Owner of all such action taken. The CMAR shall also carefully review all shop drawings and then forward the same to the AE and Owner for review and actions. The AE will transmit them back to the CMAR who will then issue the shop drawings to the affected subcontractor for fabrication or revision. The CMAR shall maintain a suspense control system to promote expeditious handling. The CMAR shall request the AE to make interpretations of the drawings or specifications requested of him by the subcontractors and shall maintain a business system to promote timely response. The CMAR shall inform the AE which shop drawings or requests for clarification have the greatest urgency and need to be responded to first. The purpose shall be to enable the AE to prioritize requests coming from the CMAR. The AE shall timely respond. The CMAR shall advise the Owner and AE when timely response is not occurring on any of the above.

(9) Job Site Requirements.

(a) The CMAR shall provide each of the following activities as a part of its services hereunder:

(i) Maintain a log of daily activities, including manpower records, weather, delays, major decisions, etc.

(ii) Maintain a roster of companies on the **PROJECT** with names and telephone numbers of key personnel.

(iii) Establish and enforce job rules governing parking, clean-up, use of facilities and work discipline.

(iv) Provide labor relationships management and equal opportunity employment for a harmonious productive **PROJECT**.

(v) Provide and administer a safety program for the **PROJECT** to meet OSHA requirements. Monitor for subcontractor compliance without relieving them of responsibilities to perform work in accordance with best acceptable practice.

(vi) Provide quality control program.

(vii) Provide miscellaneous office supplies that support the construction efforts which are consumed by its own forces.

(viii) Provide for travel to and from its home office to the Project Site and to those other places within Hamilton County as required by the **PROJECT**.

(b) The CMAR shall provide personnel and equipment or shall arrange for separate subcontractors to provide each of the following as a Project Cost:

(i) Distribution of all required bidding documents and shop drawings, including the sets required by the Permitting Authority's inspectors.

(10) Job Site Administration. The CMAR shall provide as part of its services, job site administrative functions during construction to assure proper documentation, including but not limited to the following:

(a) Job Meetings. Hold progress and coordination meetings to provide for a timely completed **PROJECT**. Implement procedures and assure timely submittals, expedite processing approvals and return of shop drawings, samples, etc. Coordinate and expedite critical ordering and delivery of materials, work sequences, inspection and testing(s), labor allocation, etc. Review and implement revisions to the Project Schedule. Monitor and promote safety requirements. The CMAR shall use the job site meetings as a tool for (i) preplanning of work and enforcing schedules and for establishing procedures, responsibilities and identification of authority for all to clearly understand; (ii) identify party or parties responsible for follow up on any problems, delay items or questions, and (iii) record course for solution. The CMAR shall visit each pending item at each subsequent meeting until resolution is achieved and shall require all present to make known any problems or delaying event known to those present for appropriate attention and resolution.

(b) Material and Equipment Expediting. Provide staff to closely monitor material and equipment deliveries, critically important checking and follow-up procedures on supplier commitments of all subcontractors and maintain a material and equipment expediting log.

(c) Payments to Subcontractors. Develop and implement a procedure for review, processing and payment of applications by subcontractors for progress and final payments.

(d) Document Interpretation. Refer all questions for interpretation of the documents prepared by the AE to the AE and the Owner.

(e) Reports and Project Site Documents. Record the progress of the **PROJECT**. Submit written progress reports to the Owner and the AE, including information on subcontractors' work, and the percentage of completion. Keep a daily log available to the Owner, the AE and the Permitting Authority inspectors.

(f) Subcontractors Progress. Prepare periodic punch lists for subcontractor's work including unsatisfactory or incomplete items and schedules for their completion.

(g) Substantial Completion. The CMAR, AE, and Owner will conduct a pre-substantial completion inspection. The CMAR will prepare the pre-substantial completion punch list from which the CMAR and AE will develop a completion schedule. The CMAR shall ascertain when the work or designated portions thereof are ready for Owner and AE substantial completion inspection. The CMAR shall provide a complete list of incomplete or unsatisfactory items (preliminary punch list) to the Owner and AE prior to this inspection. The Owner and AE shall add to this list additional incomplete or unsatisfactory item(s). The CMAR shall prepare a punch list of items to be completed and a schedule for their completion including completion dates for review and approval by the Owner and AE ("Punch List Completion Date").

(h) Final Completion. Monitor the subcontractors' performance on the completion of the **PROJECT** and provide notice to the Owner and AE that the work is completed and ready for final

inspection. Secure and transmit three (3) copies to the Owner, through the AE, all required guarantees, affidavits, releases, bonds and waivers, manuals, record drawings and maintenance books including a final completion form.

(i) Startup. With the Owner's personnel, direct the check-out of utilities, operations, systems and equipment for readiness and assist in their initial start up and testing by the subcontractors.

(j) Record Drawings. The CMAR shall monitor the progress of its own forces or its subcontractors on marked up field prints so as to provide completed record drawings to be turned over to the AE for preparation of As-builts as required herein.

(k) Administrative Records. The CMAR will maintain at the job site and his principal office, originals or copies of, on a current basis, files and records, such as, but not limited to the following:

Contracts or Purchase Orders
Shop Drawings submittal/Approval Logs
Equipment Purchase/Delivery Logs
Contract Drawings and Specifications with Amendment
Warranties and Guarantees
Cost Accounting Records
Labor Costs
Material Costs
Equipment Costs
Cost Proposal Request
Payment Request Records
Meeting Minutes
Cost Estimates
Bulletin Quotations
Lab Test Reports
Insurance Certificates and Bonds
Contract Changes
Purchase Orders
Material Purchase Delivery Logs
Technical Standards
Design Handbooks
Record Drawing Marked Print
Operating and Maintenance Instruction
Daily Progress Reports
Transmittal Records
Inspection Reports
Bid/Award Information
Bid Analysis and Negotiations
Punch Lists
PMIS Schedule and updates
Suspense (Tickler) Files of Outstanding Requirements
Documentation of Good Faith Effort
Correspondence Files

The **PROJECT** records shall be available at all reasonable times to the Owner and AE for reference, review or reproduction.

(11) Shop Drawings and Samples. After checking and verifying all field measurements, the CMAR will submit to the AE and Owner for approval, in accordance with the acceptable schedule of Shop Drawing submission, five copies of all Shop Drawings, which shall have been checked by and stamped with the approval of the CMAR and identified as the AE may require. The data shown on the Shop Drawings will be complete with respect to dimensions, design criteria, materials of construction and the like to enable the AE to review the information as required.

The CMAR will also submit to the AE for approval with such promptness as to cause no delay in the Work, all samples required by the Contract Documents. All samples will have been checked by and stamped with the approval of the CMAR, identified clearly as to material, manufacturer, any pertinent numbers and the use for which intended.

(a) At the time of each submission, the CMAR will in writing call the AE's attention to any deviations that the Shop Drawing or sample may have from the requirements of the Contract Documents and, in addition, shall cause a specific notation to be made on each shop drawing submitted for review and approval of each such variation.

The AE will review and approve with reasonable promptness Shop Drawings and Samples, but its review and approval shall be only for conformance with the design concept of the **PROJECT** and for compliance with the information given in the Contract Documents. The approval of a separate item as such will not indicate approval of the assembly in which the item functions. The CMAR will make any corrections required by the AE and will return the required number of corrected copies of Shop Drawings and resubmit new samples until approved. All cost incurred for the resubmitted shop drawing shall be the CMAR responsibility. The CMAR's stamp of approval on any Shop Drawing or sample shall constitute a representation to the AE that the CMAR has either determined and verified all quantities, dimensions, field construction criteria, materials, catalog numbers and similar data or he assumes full responsibility for doing so, and that he has reviewed or coordinated each Shop Drawing or sample with the requirements of the Work and the Contract Document.

No work requiring a Shop Drawing or sample submissions shall be commenced until the submission has been approved by the AE. Any related work performed prior to review and approval by the Owner of the pertinent submission will be sole expense and responsibility of the CMAR. A copy of each approved Shop Drawing and each approved sample shall be kept in good order by the CMAR at the site and shall be available to the AE.

The AE approval of Shop Drawings or samples shall not relieve the CMAR from his responsibility for any deviations from the requirements of the Contract Documents, unless the CMAR has in writing called the AE's attention to such deviation at the time of submission and the Owner and the AE have given written approval to the specific deviation; or shall any approval by the AE relieve the CMAR from responsibility for errors or omissions in the Shop Drawings.

4.07 Project Schedule; Substantial Completion; Occupancy.

(1) Establishment of Project Substantial Completion Date. At the time a Guaranteed Maximum Price (GMP) is established, the Project Substantial Completion Date for completion of the construction may be amended by Owner upon recommendation of Construction Team, if reasonably necessary, which Project Substantial Completion Date shall be subject to mutually agreed upon Project delays. An amendment to Substantial Completion Date under this section will not necessarily involve additional CMAR compensation. The CMAR agrees to complete the construction prior to the Project Substantial Completion Date. The CMAR acknowledges that failure to complete the **PROJECT** prior to the Project Substantial Completion Date will result in substantial damages to the Owner. The CMAR

shall be assessed liquidated damages, as Owner's sole and exclusive remedy, in the amount, (***Liquidated Damages will be established with Phase 2 amendment***), per calendar day for each day completion is extended beyond the Project Substantial Completion Date, plus any fines and penalties directly imposed against Owner by any regulatory and/or governmental authority against Owner. Provided, however, CMAR and Owner shall cooperate with each other, and shall use best efforts and due diligence to avoid the imposition of any such fines and/or penalties.

(2) Completion of Construction. The date of Substantial Completion of the **PROJECT** or a designated portion thereof is the date when construction is sufficiently complete in accordance with the Project Plans and Specifications so the Owner can lawfully occupy or utilize the **PROJECT** for the use for which it is intended. The CMAR warranty shall commence on the Project Final Completion Date.

(3) Owner Occupancy. The CMAR shall provide services during the design and construction phases which will provide a successful and timely Owner occupancy of the **PROJECT**. The CMAR shall provide consultation and Project management to facilitate Owner occupancy and provide transitional services to get the work, as completed by the subcontractors; "on line" in such conditions as will satisfy Owner operations requirements. The CMAR shall catalog operational and maintenance requirements of the equipment to be operated by maintenance personnel and convey these to the Owner in such a manner as to promote their usability. The CMAR shall provide operations training, in equipment use, for building operators.

(4) Record Drawings. The CMAR shall continuously review Record Drawings and mark up progress prints. Upon receipt by CMAR of its final payment due hereunder, the CMAR shall provide to the AE and Owner an original of marked-up, Record Project Plans and Specifications showing the location and dimensions of the **PROJECT** as constructed, which documents shall be certified as being correct by the CMAR and the AE.

4.08 CMAR's Warranty. The CMAR warrants that all labor and materials will conform to the Project Plans and Specifications. The CMAR further warrants that all materials and equipment will be new, of good quality and free from any defects. With respect to the same work, the CMAR further agrees to correct or replace as necessary all work found by the Owner to be defective in material and workmanship or not in conformance with the Project Plans and Specifications for a period of one year from the Project Substantial Completion Date. CMAR shall use its best efforts and due diligence to ensure that, during the warranty period, those entities or individuals who have provided direct warranties to the Owner as required by the contract documents perform all required warranty work in a timely manner and at the sole cost and expense of such warranty providers. The direct cost of any warranty work shall be paid by CMAR. The CMAR shall collect and deliver to the Owner any specific written guaranties or warranties given by others as required by the contract documents. Also, the CMAR shall conduct, jointly with the Owner and the AE, a warranty inspection eleven (11) months after the Project Final Completion Date.

4.09 Lien Free Construction. All construction services provided by CMAR or any of the subcontractors in construction of the **PROJECT** on the Project Site shall be accomplished in a manner that will result in no liens, claims or encumbrances being imposed against the **PROJECT, provided Owner is maintaining their payment obligations required herein**.

ARTICLE 5.
OWNER'S RESPONSIBILITY

5.01 Project Site; Title. The Owner hereby represents to the CMAR that it currently has, and will maintain up through and including the Project Substantial Completion Date, good title to all of the real property constituting the Project Site. Owner agrees to resolve, at its expense, any disputes relating to the ownership and use of the Project Site which might arise during the course of construction.

5.02 Permits . The CMAR shall be responsible for paying for all licenses and shall be responsible for payment of and obtaining all necessary permits and governmental authorizations as may be necessary for the commencement of construction as contemplated by this Agreement, and through the completion of the **PROJECT**. Such permits and governmental authorizations shall include the Building Permit, temporary construction easements or right-of-ways if necessary, vacation of right-of-ways as may be required and any necessary variances, rezoning or other land use approvals. Upon receipt of all surveys, soils tests and other Project site information, CMAR shall promptly advise Owner of any inadequacies in such information and of the need for any additional surveys, soil or subsoil tests, or temporary construction easements or right-of-ways. Owner shall not be responsible for any delay or damages to the CMAR for any site conditions or deficiencies in the site and access to the site which could have been identified by CMAR and corrected by Owner prior to the establishment of the GMP. Nothing contained herein shall be construed as creating any obligation of the Owner relating to the **PROJECT** which is inconsistent with the exercise of Owner's obligations and responsibilities as a governmental authority, nor shall anything contained herein be construed as obligating the Owner to be a partner or joint venture with CMAR. Nothing herein shall be construed or deemed to contractually or otherwise obligate Owner to approve any rezoning or variance petition, if such rezoning or variance is necessary or desirable for development and/or completion of the **PROJECT**.

5.03 Project Plans and Specifications; Architect. The parties hereto acknowledge and agree that owner has previously entered into an agreement between Owner, Hamilton County Government and AE dated January 31, 2025. Pursuant to the terms of such agreement, the AE, as an agent and representative of Owner, is responsible for the preparation of Project Plans and Specifications which consist of drawings, specifications and other documents setting forth in detail the requirements for the construction of the **PROJECT**. All of such Project Plans and Specifications shall be provided either by Owner or the AE and CMAR shall be under no obligation to provide same and shall be entitled to rely upon the accuracy and completeness of the Project Plans and Specifications provided by the AE, and all preliminary drawings prepared in connection therewith. The CMAR shall be notified of any written modification in the agreement between Owner and AE. By execution hereof, CMAR represents and warrants that it has reviewed the agreement between Owner and AE, and finds that such agreement between Owner and AE is consistent and compatible with the obligations and requirements of CMAR as more fully set forth in this Agreement.

5.04 Surveys; Soil Tests and Other Project Site Information. Owner shall be responsible for providing a legal description and certified land survey of the Project Site in a form and content, and with such specificity as may be required by the AE and CMAR to perform their services. To the extent deemed necessary by Owner and AE, and solely at Owner's expense, Owner may engage the services of a Geotechnical Consultant to perform test borings and other underground soils testing as may be deemed necessary by the AE or the CMAR. CMAR shall not be obligated to provide such surveys or soil tests and shall be entitled to rely upon the accuracy and completeness of the information provided to CMAR. Owner shall provide CMAR as soon as reasonably possible following the execution of this Agreement all surveys or other survey information in its possession describing the physical characteristics of the Project Site, together with soils reports, subsurface investigations, utility locations, deed restrictions, easements and legal descriptions then in its possession or control.

5.05 Information; Communication; Coordination. The Owner hereby designates the District Facilities Director designee as Project Coordinator, to act in the Owner's behalf with respect to the **PROJECT**. The Project Coordinator shall examine all documents or requests for information submitted by the CMAR and shall advise CMAR of Owner's decisions pertaining thereto within a reasonable period of time to avoid unreasonable delay in the progress of the CMAR's services. CMAR shall indicate if any such documents or requests warrant priority consideration. However, decisions pertaining to approval of the Project Schedule as it relates to the date of Substantial Completion, the Project cost, CMAR's compensation, documentation relating to use of contingency, approving or changing the GMP shall only be effective when approved in writing by the Owner. Owner reserves the right to designate a different Project Coordinator provided CMAR is notified in writing of any such change. Owner and AE may communicate with subcontractors, materialmen, laborers or suppliers engaged to perform services on the **PROJECT**. Neither the Owner nor the AE shall attempt to direct the work of or otherwise interfere with any subcontractor, materialmen, laborer or supplier or otherwise interfere with the work of the CMAR.

5.06 Construction Inspections and Coordination. Owner, AE and CMAR agree to cooperate and coordinate with each other and all Permitting Authorities, including specifically: **Hamilton County Codes and Building Services**

5.07 Acknowledgment. The CMAR recognizes and acknowledges that Owner is a governmental body with certain procedural requirements to be satisfied. CMAR has and will make reasonable allowance in its performance of services for such additional time as may be required for approvals and decisions by the Owner and any other necessary government agency. Specific directions and approval made by the Owner shall be in writing authorized at its regular or special Board Meetings, or as otherwise consistent with authorities granted to the Project Coordinator.

ARTICLE 6.
SUBCONTRACTOR SELECTION AND PAYMENT PROCESS

6.01 Definition. A subcontractor is a person or organization who has a direct contract with the CMAR to perform any work at the Project Site. Except as specifically set forth herein with respect to direct materials acquisitions by Owner, nothing contained in this Agreement or in any contract document does or shall create any contractual relation between the Owner or AE and any subcontractor. Specifically, the CMAR is not acting as an agent of the Owner with respect to any subcontractor.

6.02 Subcontracts. The CMAR shall provide a copy of all proposed subcontracts, including general supplementary conditions to the Owner. Owner and CMAR understand, acknowledge and agree that Owner is in the process of evaluating its requirements for the procurement of subcontractor services necessary to construct the **PROJECT**. Prior to establishment of the GMP and CMAR's solicitation from subcontractors and/or suppliers, Owner and CMAR shall agree upon a procurement methodology and process which shall comply with the legal requirements and expectations of Owner. CMAR agrees to cooperate with Owner in any procurement methodology and process which is required by law, and also cooperate with Owner in any such methodology or process desired by Owner (and not otherwise legally required) provided that such cooperation does not result in any extension of the Project Substantial Completion Date established by the Project Schedule.

6.03 Application for Progress Payments.

(1) Not more often than once a month, nor less often than specified in the approved payment schedule, and on a date established at the Project Preconstruction Conference, the CMAR will submit to the AE and Owner for review an Estimate and Requisition for Payment Form filled out and signed by the CMAR covering the actual Work completed as of the date of the Application and supported by such

data. Also, if payment is requested on the basis of materials and equipment not incorporated in the Work but delivered and suitably stored at the site or at another location agreed to and authorized in writing, the application for Payment shall also be accompanied by such supporting data, satisfactory to the Owner, as well establish the Owner's title to the material and equipment and protect its interest therein, including applicable insurance. All progress payments will be subject to the retainage percentage. Such retainage shall be paid and will be issued in the final payment after acceptance by the Owner of the Work.

The Estimate and Requisition for Payment form shall list individually, each instrument of change to the Guaranteed Maximum Price or Project Contingency, its approved value, the amount previously requisitioned, the amount sought in the current requisition, the total value of completed work and, if requested by the Owner, the Estimate and Requisition for Payment form shall, for each instrument of change to the Guaranteed Maximum Price or Project Contingency, be further detailed to provide a breakdown, by trade, of the values and requisition amounts for each trade, for each change instrument.

(2) Approval of Payments. The AE will, within ten (10) calendar days after receipt of each Application for Payment, either indicate his approval of payment and deliver the application to the Owner or return the Application to the CMAR indicating in writing the reason for refusing to approve payment. In the latter case, the CMAR may make the necessary corrections and resubmit the Application. The Owner will, within five (5) calendar days after receipt of each approved application for payment, either indicate their approval of payment and within fifteen (15) calendar days pay the CMAR ninety five percent (95%) of the portion of the GMP properly allocated to labor, materials and equipment incorporated in the Work and ninety five percent (95%) of the portion of the GMP properly allocated to materials and equipment suitably stored at the site or at some other location or return the application to the CMAR through the AE indicating in writing the reason for refusing to approve payment. In the latter case, the CMAR may make the necessary corrections and resubmit the application to the AE.

The AE's approval of any payment requested in an Application for Payment shall constitute a representation by him to the Owner, based on the AE's on-site observations of the Work in progress and on his review of the Application for Payment and the supporting data that the CMAR is entitled to payment of the amount approved.

The AE may refuse to approve the whole or any part of any payment if in his opinion, he is unable to make such representations to the Owner. He may then refuse to approve any such payment because of subsequently discovered evidence or the results of subsequent inspections or test, nullify any such payment previously approved, to such extent as may be necessary in his opinion to protect the Owner from loss because:

1) The Work is defective;
2) A portion of such payment is the subject of a dispute or claim that has been filed.
3) The amount has been reduced because of Modifications;
4) The Owner has been required to correct defective Work or complete the Work in accordance with the guarantee and warranty.
5) Of unsatisfactory prosecution of the Work, including failure to clean up.

(3) The CMAR shall pay each subcontractor, upon receipt of payment from the Owner, out of the amount paid to the CMAR on account of such subcontractor's work, the amount to which the subcontractor is entitled in accordance with the terms of the CMAR's contract with such subcontractor. The CMAR shall, by appropriate agreement with each subcontract, require each subcontractor to make payments to subcontractors in a similar manner. After receipt of payment from Owner, if the need should arise to withhold payments to subcontractors for any reason, as solely determined by CMAR,

the CMAR shall promptly restore such monies to the owner, adjusting pay requests and Project bookkeeping as required.

Commencing with second application of the Estimate and Requisition for Payment form, the Owner may require, as a condition of payment, the submission of releases of lien from any or all subcontractors. Where the Owner so requires, the releases furnished shall be original copies, properly executed and notarized, in a form acceptable to the Owner.

(4) The CMAR warrants that upon payment of any retainage, materials and equipment covered by a partial payment request will pass to Owner either by incorporation in construction or upon receipt of payment by the CMAR, whichever occurs first; (a) work, materials and equipment covered by previous partial payment requests are free and clear of liens, claims, security interests or encumbrances, hereinafter referred to as "liens"; and (b) no work, materials or equipment covered by a partial payment request will have been acquired by the CMAR, or any other person performing work at the site or furnishing materials or equipment for the **PROJECT** is subject to an agreement under which an interest therein or an encumbrance thereon is retained by the seller or otherwise imposed by the CMAR or other such person.

6.04 Application for Final Payment.

(1) Final Inspection. Upon written notice from the CMAR that the **PROJECT** is complete, the AE and Owner will make a final inspection with the CMAR and will notify the CMAR in writing of any particulars which this inspection reveals that the Work is defective. The CMAR shall immediately make such corrections as are necessary to remedy the defects within a reasonable time.

(2) Final Inspection for Payment. After the CMAR has completed any such corrections to the satisfaction of the AE and Owner and delivered all maintenance and operating instructions, schedules, guarantees, bonds, certificates of inspection and other documents as required by the Contract Documents, he may make application for final payment following the procedure for progress payments. The final Application for Payment shall be accompanied by legally effective final releases or waivers of liens from the CMAR and all subcontractor(s) which performed services for the CMAR pursuant to the Contract Documents and the consent of surety, if applicable to final payment.

(3) Approval of Final Payment. If, on the basis of its observations and review of the Work during construction, its final inspection and its review of the final Estimate and Requisition for Payment, all as required by the Contract Documents, the AE is satisfied that the Work has been completed and the CMAR has fulfilled all of his obligations under the Contract Documents, it will, within ten (10) calendar days after receipt of the final Application for Payment, indicate in writing its approval of payment and deliver the application to the Owner. Otherwise, it will return the Application to the CMAR, indicating in writing its reason for refusing to approve final payment, in which case the CMAR will make the necessary corrections and resubmit the Application. The Owner will, within fifteen (15) calendar days after receipt of approved application for final payment, either indicate their approval of the estimate and requisition application for payment and within fifteen (15) calendar days pay the CMAR the amount approved by the Owner and issue a Certificate of Final Completion or return the application through the AE indicating in writing the reason for refusing to approve payment. In the latter case, the CMAR may make the necessary corrections and resubmit the application to the AE.

If, after substantial Completion of the Work, final completion is materially delayed through no fault of the CMAR, and the AE so confirms, the Owner shall and without terminating the Agreement, make payment of the balance due for that portion of the Work fully completed and accepted. If the remaining balance for Work not fully completed or corrected is less than the retainage stipulated in the Agreement, and if bonds have been furnished, the written consent of the Surety to the payment of the balance due

for that portion of the Work fully completed and accepted, shall be submitted by the CMAR to the AE, prior to certification of such payment. Such payment shall be made under the terms and conditions governing final payment, except that it shall not constitute a waiver of claims.

If liquidated damages are to be deducted from the final payment, the Owner shall so notify the CMAR in writing at least ten (10) calendar days prior to the Owner's submittal to Finance.

The CMAR will be required to submit with his final payment documents a DBE Participation Certification indicating all DBE subcontractor(s) and amount(s) utilized for the **PROJECT**.

At the final completion of the construction **PROJECT** the Owner's Project Manager will prepare a Contractor Performance Evaluation, and forward to the CMAR for review, comment and signature.

Upon receipt of the Contractor Performance Evaluation the CMAR will have seven (7) calendar days, from the date received, to review, comment, sign and return back to the Project manager. If the evaluation has not been received back from the CMAR within the seven (7) calendar days, the Owner will assume the CMAR fully agrees with and has no comments to the evaluation.

(4) Final Accounting Costs. Final accounting of costs of the work shall be provided by the CMAR in the form of a detailed cost report showing vendor, invoice number and date of invoice for all costs, all sorted by trade division cost code as is maintained by the CMAR in his accounting system. Upon receipt of the detailed cost report final accounting, the Owner may have access to all accounting records at the CMAR's place of business for review and reporting purposes by the Owner's accountant, whether external or internal.

ARTICLE 7
CHANGES IN THE PROJECT

7.01 Amending and Supplementing Contract Documents. The Contract Documents may be amended to provide for additions, deletions and revisions in the Work or to modify the terms and conditions thereof in one or more of the following ways:

(a) a formal Written Amendment,

(b) a Change Order, or

(c) a Field Directive Change.

The Contract price and the Contract Time may only be changed by the Change Order or a Written Amendment.

In addition, the requirements of the Contract Documents may be supplemented and minor variations and deviations in the Work may be authorized, in one or more of the following ways:

(a) a Field Change Order,
(b) the AE approval of a Shop Drawing or sample, or
(c) the AE written interpretation or clarification.

7.02 Changes in Work. Without invalidating the Agreement, the Owner may , upon mutual agreement with CMAR, and at any time or from time to time order additions, deletions or revisions in the Work; these will be authorized by Change Orders or Field Directive Change. Upon receipt of a Change Order or Field Directive Change, the CMAR will proceed with the Work involved.

All such Work shall be executed under the applicable conditions of the Contract Documents.

If any Change Order or Field Directive Change causes an increase or decrease in the Guaranteed Maximum Price (GMP) or any extension or shortening the Contract Time, an equitable adjustment will be made.

Additional Work performed by the CMAR without written authorization of a change in the form of an approved Change Order will not entitle him to an increase in the Guaranteed Maximum Price (GMP) or any extension of the Contract Time, except in the case of an emergency.

It is the CMAR's responsibility to notify the Surety of any changes affecting the general scope of the Work or change of the Guaranteed Maximum Price (GMP) and the amount of the applicable Bonds shall be adjusted accordingly. The Surety's Acceptance must be submitted to the AE, by the CMAR, within ten (10) calendar days of the initiation of the change.

7.03 Change of Guaranteed Maximum Price. The Guaranteed Maximum Price (GMP) constitutes the total compensation payable to the CMAR for performing the Work. All duties, responsibilities and obligations assigned to or undertaken by the CMAR shall be at his expense without change in the Guaranteed Maximum Price.

The Guaranteed Maximum Price (GMP) may only be changed by a Change Order. Any claim for an increase or decrease in the Guaranteed Maximum Price (GMP) shall be in writing and delivered to the AE within fifteen (15) calendar days of the occurrence of the event giving rise to the claim and stating the general nature of the claim. Notice of the amount of the claim with supporting data shall be delivered within fifty (50) calendar days after such occurrence (unless Owner allows an additional period of time to ascertain more accurate data in support of the claim) and shall be accompanied by the CMAR's written statement that the amount claimed covers all known amounts (direct and indirect) to which the CMAR has reason to believe it is entitled as a result of the occurrence of said event. No claim for an adjustment in the Guaranteed Maximum Price (GMP) will be valid if not submitted in accordance with this paragraph. All claims for adjustment in the Guaranteed Maximum Price (GMP) shall be reviewed by the AE. Any change in the Guaranteed Maximum Price (GMP) shall be incorporated in a Change Order and approved by the Owner. No claim by the CMAR for an equitable adjustment hereunder shall be allowed if asserted after final payment under this Contract.

The value of any Work covered by a Change Order or of any claim for an increase or decrease in the Guaranteed Maximum Price shall be determined in one of the following ways:

(a) Where the Work involved is covered by unit prices contained in the Contract Documents or subsequently agreed upon, by application of unit prices to the quantities of the items involved.

(b) By mutual acceptance of a lump sum properly itemized and supported by sufficient substantiating data to permit evaluation.

(c) By cost of the Work and mutually acceptable fixed amount for overhead and profit agreed upon by the parties.

In such cases the CMAR will submit in the form prescribed by the Owner an itemized cost breakdown together with supporting data. The amount of credit to be allowed by the CMAR to the Owner for any such change which results in a net decrease in cost will be the amount of the actual net decrease as determined by the Owner. When both additions and credits are involved in any one change, the combined overhead and profit shall be figured on the basis of the net increase or decrease, if any.

Regardless of how the value of Work covered by a Change Order or any other claim for an increase or decrease in the Guaranteed Maximum Price is determined, in no case shall the total amount of overhead and profit, including all tiers of subcontractors, exceed 15% of the cost of the Work, unless otherwise approved by the Owner. Such 15% limit shall not include the cost of the Construction Manager's General Conditions or CMAR Fees where due.

7.04 Change of Contract Time. The Contract Time may only be changed by a Change Order. Any claim for an extension in the Contract Time shall be in writing and delivered to the AE within fifteen (15) calendar days of the occurrence of the event giving rise to the claim and stating general nature of the claim. Notice of the extent of the claim with supporting data (analysis and documentation) shall be delivered within sixty (60) calendar days after such occurrence (unless the AE allows an additional period of time to ascertain in more accurate data in support of the claim) and shall be accompanied by the CMAR's written statement that the adjustment claim is the entire adjustment to which the CMAR has reason to believe it is entitle as a result of the occurrence of said event. If adverse weather conditions are the basis for a claim for additional time, such claim shall be documented by data substantiating that weather conditions were abnormal for the period of time and could not have been reasonably anticipated, and that the weather conditions had an adverse effect on the scheduled construction. No claim by the CMAR under this provision shall be allowed unless the CMAR has given the notice and the analysis and documentation required in this paragraph. All claims for adjustment in the Contract Time resulting from any such claim shall be incorporated in a Change Order.

The Owner shall not be responsible for any delay in the completion of the **PROJECT** where the delay is beyond the control or without fault or negligence on behalf of the Owner. The Owner shall not be held accountable for extra compensation or an extension of time due to default by the CMAR, subcontractors, or suppliers in the furnishing of labor or materials for the **PROJECT**, or having to replace defective materials.

The CMAR shall be entitled to a claim for an extension of time when a delay or hindrance is caused by an act of God, or any act or omission on the part of the Owner or any party within their control, provided the CMAR gives notice to the AE within fifteen (15) calendar days of the occurrence of the event giving rise to the claim and having stated the general nature of the claim. The CMAR's remedy shall be an extension of Contract Time and a reasonable increase to the Guaranteed Maximum Price.

No extension of Contract Time or increases in Guaranteed Maximum Price (GMP) shall be granted for any delay caused either by (1) inadequate crewing, default or bankruptcy of lower tier contract, slow submittals, etc., or (2) by severe though not unusual weather conditions (other than hurricanes and tornadoes) or (3) any delay impacting a portion of the Work within the available total float or slack time and not necessarily preventing completion of the Work within the Contract Time unless otherwise agreed to by the Owner in its sole discretion or (4) for any delay which is caused by the CMAR having to replace defective material or (5) delays attributable to the lack of performance by subcontractors regardless of the reasons.

ARTICLE 8.
RELATIONSHIP BETWEEN CMAR AND ARCHITECT-ENGINEER (AE)

8.01 Administration. The AE will provide administration of this Agreement as it relates to inspection of the **PROJECT** during construction and shall at all times have access to the work wherever it is in preparation and progress. Owner shall, in accordance with this Agreement and Owner's Agreement with AE, use its best efforts to maintain cooperation between the AE and CMAR.

8.02 Inspection of the Work. The AE will visit the Project Site at intervals appropriate to the stage of construction to become familiar with the progress and quality of the work and to determine in general if the work is proceeding in accordance with this Agreement and the Project Plans and Specifications. On the basis of the AE's on-site observations as the design professional, the AE will keep the Owner informed of the progress of the work, and will endeavor to protect the Owner against defects and deficiencies in the work of the CMAR. The AE will not have control or charge of and will not be responsible for construction means, methods, techniques, sequences or procedures, or for safety precautions and programs in connection with the work which shall be the obligation of CMAR.

8.03 Interpretation of Project Plans and Specifications. The AE will be the interpreter of the requirements of the Project Plans and Specifications. Upon receipt of comments or objections by CMAR or Owner, the AE will make decisions on all claims, disputes or other matters pertaining to the interpretation of the plans and specifications. The AE's decisions in matters relating to artistic effect will be final if consistent with the Project Plans and Specifications.

8.04 Rejection of Nonconforming Work. The AE and Owner have the authority to reject work which does not conform to the Project Plans and Specifications.

8.05 Uncovering of Work.

(1) If any portion of the work should be covered contrary to the written request of the AE, it must, if required in writing by the AE, be uncovered for his observation and shall be recovered at the CMAR's expense.

(2) If any other portion of the work has been covered which the AE has not specifically requested to observe prior to being covered, the AE may request to see such work and it shall be uncovered by the CMAR. If such work be found to be in accordance with the Project Plans and Specifications, the cost of uncovering and replacement shall, by appropriate Change Order, be added to the Project Cost.

8.06 Correction of Work. The CMAR shall promptly correct all work rejected by the AE for being defective or as failing to conform to the Project Plans and Specifications whether observed before or after the Project Completion Date and whether or not fabricated, installed or completed. The CMAR shall bear all costs of correcting such rejected work, including compensation for AE additional services made necessary thereby.

8.07 Timely Performance of AE. Owner, CMAR and AE understand, acknowledge and agree that timely performance and response by AE to certain information requested by CMAR is an important aspect of joint cooperation between and among the Construction Team. The CMAR shall identify which requests for information or response from the AE have the greatest urgency, and the CMAR shall identify those items which require prioritizing in response by the AE. The CMAR shall also identify the preferred time period for response and shall request a response time which is reasonably and demonstrably related to the needs of the **PROJECT** and CMAR. In the event that the period of time identified by CMAR for response is demonstrably unfair, AE shall communicate such information to CMAR, in writing, and AE shall identify the time necessary for response and a date upon which the AE's response will be made. In the event that the AE believes that any such information provided by CMAR is incomplete or otherwise inadequate to provide its response, AE shall immediately inform CMAR of such fact, in writing, with a copy to the Owner's Project Coordinator. In the event that the CMAR believes that AE is not providing timely services or responses as required by this paragraph, CMAR shall immediately inform AE of such fact, in writing, with a copy to the Owner's Project Coordinator.

ARTICLE 9
CONTRACTOR'S LIABILITY INSURANCE

9.01 Contractor's Liability Insurance. The CMAR will purchase and maintain such insurance as will protect him from claims under Worker's Compensation laws, disability benefit laws or other similar employee benefit laws; from claims for damages because of bodily injury, occupational sickness or disease, or death of his employees including claims insured by usual personal injury, sickness and disease, or death of any person other than his employees including claims insured by usual personal injury liability coverage; and from claims for injury to or destruction of tangible property including loss of use resulting therefrom any or all of which may arise out of or result from the CMAR's operations under the Contract Documents, whether such operations be by himself or any subcontractor or anyone directly or indirectly employed by any of them or for whose acts any of them may be legally liable. This insurance shall be written for no less than the limits of liability specified in the Contract Documents or required by law, whichever is greater, and shall include contractual liability insurance. As a prerequisite to the Owner signing the Contract, the CMAR will file with the Owner certificates of such insurance, acceptable to the Owner; these certificates shall contain a provision for cancellation.

9.02 Insurance Requirements. Before final execution of the Agreement and until acceptance of the Work by the Owner, the CMAR shall procure and maintain insurance of the types and of the limits specified below.

An Insurance Certificate shall be required from the CMAR. Such form must be properly executed and submitted by an authorized representative of the insurance company and CMAR. Such certificate of insurance state that the coverage is primary, and shall be in the types and amounts stated below.

9.03 Certificate of Insurance. the Hamilton County Department of Education, its officers and employees is to be specifically included as an Additional Insured on the Commercial General Liability coverage.

It shall be the responsibility of the CMAR to ensure that all subcontractors carry General Liability Insurance, Automobile Liability, and Workers' Compensation in compliance with statutory limits.

The Certificate of Insurance must contain the following limits:

(a) Worker's Compensation: Coverage to apply for all employees for Statutory Limits in compliance with the applicable state and federal laws. The policy must include Employers' Liability with a minimum limit of $500,000.00 each accident. The certificate shall include a waiver of subrogation from the carrier.

(b) Commercial General Liability: Shall have minimum limits of $ $2,000,000.00 per occurrence plus $10,000,000.00 in umbrella/excess liability coverage. Combined Single Limit for Bodily Injury Liability and Property Damage Liability. This shall include Premises and/or Operations, Independent Contractors and Products and/or Completed Operations, Broad Form Property Damage, and a Contractual Liability Endorsement. Said coverage must be on an occurrence basis. the Hamilton County Department of Education, its officers and employees shall be included as an Additional Insured.

(c) Business Automobile Policy: Shall have minimum limits of $1,000,000.00 per occurrence. Combined Single Limit for Bodily Injury Liability and Property Damage Liability. This shall include Owned Vehicles, Hired and Non-owned Vehicles, and Employees Non-Ownership and be based on occurrence basis.

(d) All Risk Builders Risk or Installation Floater: Upon execution of the Phase 2 Amendment, and prior to issuance of the Notice to Proceed for Construction Phase services, the CMAR shall also

procure and maintain All Risk coverage, with the limits of insurance to equal 100% of the completed contract amount of the Project. Any deductible is the responsibility of the CMAR. The Owner shall be named as an additional insured only with respect to losses in connection with this contract.

The CMAR agrees that the requested insurance coverage(s) are not intended to and shall not, in any manner, limit or reduce the liabilities and obligations assumed by the CMAR, it's agents, employees, subcontractors, etc.

ARTICLE 10.
FORCE MAJEURE, FIRE OR OTHER CASUALTY

10.01 Force Majeure.

(1) Delays in any performance by any party contemplated or required hereunder due to: fire, flood, earthquake or hurricane, acts of God, war, declaration of hostilities, revolt, civil strife, altercation or commotion, strike, labor dispute, or epidemic, or any law, order, proclamation, regulation or ordinance of any government or any subdivision thereof, or for any other similar cause to those enumerated, beyond the reasonable control and which with due diligence could not have been reasonably anticipated and without the fault or negligence of the party seeking excuse from performance, shall be deemed to be events of Force Majeure and any such delays shall be excused. In the event such party is delayed in the performance of any work or obligation pursuant to this Agreement for any of the events of Force Majeure and any such delays shall be excused. In the event such party is delayed in the performance of any work or obligation pursuant to this Agreement for any of the events of Force Majeure, the date for performance required or contemplated by this Agreement shall be extended by the number of calendar days such party is actually delayed in such substantial completion.

(2) The party seeking excuse for nonperformance on the basis of Force Majeure shall promptly give written notice to the Owner, if with respect to the CMAR, or to the CMAR, if with respect to the Owner, specifying its actual or anticipated duration, and weekly thereafter, if such delay shall be continuing, written notice stating whether the condition continues and giving its actual or then anticipated duration. Each party seeking excuse from nonperformance on the basis of Force Majeure shall use its best efforts to rectify any condition causing a delay and will cooperate with the other party, except that neither party shall be obligated to incur any unreasonable additional costs and expenses, to overcome any loss of time that has resulted.

10.02 Casualty; Actions by Owner and CMAR. During the Construction Period, if the **PROJECT**, or any part thereof, shall have been damaged or destroyed, in whole or in part, the CMAR shall promptly make proof of loss and Owner and CMAR shall proceed promptly to collect, or cause to be collected, all valid claims which may have arisen against insurers or others based upon such damage or destruction. The CMAR shall diligently assess the damages or destruction and shall prepare an estimate of the cost, expenses and other changes, including normal and ordinary compensation to the CMAR, necessary for reconstruction of the **PROJECT** substantially in accordance with the Project Plans and Specifications. Within fifteen (15) calendar days following satisfaction of the express conditions described in subsections (1), (2) and (3) below, the CMAR covenants and agrees diligently to commence reconstruction and to complete the reconstruction or repair of any loss or damage by fire or other casualty to the **PROJECT** to substantially the same size, floor area, cubic content and general appearance as prior to such loss or damage:

(1) receipt by the Owner or the Trustee of the proceeds derived from collection of all valid claims against insurers or others based upon such damage or destruction; and receipt of other sums

from any source such that the funds necessary to pay the Project Cost and any additions to the Project Cost necessitated for repair or reconstruction are available;

(2) written agreement executed by the CMAR and the Owner, by amendment to this Agreement or otherwise, authorizing and approving the repair or reconstruction and any additions to the Project Cost necessitated thereby, including any required amendment to the GMP; and

(3) final approval by the Owner of the Project Plans and Specifications for such repair or reconstruction and issuance of any required Building Permit.

10.03 Approval of Plans and Specifications. The Owner agrees to approve the plans and specifications for such reconstruction or repair if the reconstruction or repair contemplated by such plans and specifications is economically feasible, and will restore the **PROJECT**, or the damaged portion thereof, to substantially the same condition as prior to such loss or damage and such plans and specifications conform to the applicable laws, ordinances, codes and regulations. The owner agrees that all proceeds of any applicable insurance or other proceeds received by the owner or the CMAR as a result of such loss or damage shall be used solely for payment of the costs, expenses, and other charges of the reconstruction or repair of the **PROJECT**.

10.04 Notice of Loss or Damage. The CMAR shall promptly give the Owner written notice of any significant damage or destruction to the **PROJECT**, defined as loss or damage which it is contemplated by CMAR will increase the GMP or extend the date of substantial completion, stating the date on which such damage or destruction occurred, the then expectations of CMAR as to the effect of such damage or destruction on the use of the **PROJECT**, and the then proposed schedule, if any, for repair or reconstruction of the **PROJECT**. Loss or damage which the CMAR determines will not affect the GMP or date of substantial completion will be reported to Owner and AE immediately and associated corrective actions will be undertaken without delay.

ARTICLE 11
INDEMNIFICATIONS

11.01 Indemnification by CMAR. To the fullest extent permitted by law, the CMAR shall indemnify, defend, and hold harmless the Owner, its board, officers, employees, agents, and consultants (collectively, the "Indemnitees") from and against any and all claims, demands, suits, actions, damages, liabilities, judgments, losses, costs, and expenses (including reasonable attorneys' fees and litigation costs) of any nature whatsoever arising out of, relating to, or resulting from:

1. the negligent acts, errors, omissions, or willful misconduct of the CMAR, its subcontractors, suppliers, employees, agents, or consultants in connection with the performance of the Work;
2. any material breach by the CMAR of its contractual obligations under this Agreement;
3. damage to or destruction of tangible property (including Owner's property) caused by or resulting from the CMAR or those acting under its direction;
4. injury to or death of any person caused by or resulting from the CMAR or those acting under its direction; and
5. the failure of the CMAR or those acting under its direction to comply with any applicable federal, state, or local laws, ordinances, rules, regulations, or orders.

The CMAR shall, at its sole expense, promptly repair, restore, or replace any tangible property of the Owner that is damaged by the CMAR or its subcontractors.

The obligations of indemnification under this Article shall apply regardless of whether such claim, damage, loss, or expense is caused in part by an Indemnitee; provided, however, that the CMAR shall

not be required to indemnify or hold harmless an Indemnitee against liability for damages to the extent such damages are caused by the sole negligence or willful misconduct of that Indemnitee.

The parties acknowledge and agree that nothing in this Agreement shall be construed to waive or limit the Owner's governmental immunity or defenses available under the Tennessee Governmental Tort Liability Act, Tenn. Code Ann. § 29-20-101 et seq., or other applicable law. The CMAR's indemnification obligations are separate from, and in addition to, any insurance or self-insurance maintained by the Owner, including coverage provided through the Tennessee Risk Management Trust (TNRMT). Nothing herein shall be construed to expand the obligations of the Tennessee Risk Management Trust or to create any coverage for the CMAR's indemnification responsibilities, which remain the sole responsibility of the CMAR.

11.02 Exculpation. Notwithstanding the indemnification obligations set forth herein, the CMAR shall not be liable for, nor deemed to have assumed responsibility for, the professional services provided directly to the Owner by the Architect/Engineer (AE) or its agents, employees, or consultants. Without limitation, the CMAR shall not be responsible for errors, omissions, or deficiencies in maps, drawings, specifications, surveys, reports, or other design documents prepared by the AE, nor for losses, injuries, or damages arising out of the AE's performance of professional services.

The parties further acknowledge that the Owner's participation in the Tennessee Risk Management Trust provides certain self-insurance coverage subject to statutory limitations, but nothing in this Agreement shall be construed as obligating the Tennessee Risk Management Trust to provide coverage for the CMAR's indemnification obligations, which remain the sole responsibility of the CMAR.

ARTICLE 12.
DEFAULT; TERMINATION

12.01 Termination by Owner Without Cause. The Owner reserves the exclusive right to terminate this Agreement without cause as provided herein. In the event that Owner exercises its rights of termination, Owner shall provide written notice to CMAR of termination and the termination shall become effective upon delivery to CMAR of such written notice. As a condition of Owner's termination rights provided for in this paragraph, CMAR shall be released and discharged from all obligations arising by, through or under the terms of this Agreement, and the Payment and Performance Bond shall be terminated. In the event of any such termination by Owner, Owner shall assume and become liable for obligations, commitments and unsettled contractual claims that CMAR has previously undertaken or incurred in connection with the **PROJECT** and as authorized under this agreement. In addition, Owner shall pay CMAR the additional compensation described below:

(1) Termination by Owner for Certain Identified Events. After the establishment of the GMP, if the final cost estimates make the **PROJECT** no longer reasonably feasible from the standpoint of the Owner, Owner shall provide written notice to CMAR of termination prior the Construction Commencement Date. Owner shall pay CMAR all compensation earned or accrued by CMAR up to and including the date of termination.

(2) Termination Based Upon Abandonment, Casualty or Force Majeure. If, after the Construction Commencement Date (i) Owner abandons the **PROJECT** (which for purposes of this paragraph shall mean the cessation of all construction and other activities relating to the **PROJECT**, excluding those which are necessary to wind down or otherwise terminate all outstanding obligations with respect to the **PROJECT**, and no recommencement of same within 12 months following the date of termination), or (ii) the **PROJECT** is stopped for a period of 60 consecutive calendar days due to an instance of force majeure or the result of a casualty resulting in a loss that cannot be corrected or

restored within 120 calendar days (excluding the time required to assess the damage and complete the steps contemplated), the Owner shall have the right to terminate this Agreement and pay the CMAR its compensation earned or accrued to date.

(3) Owner's Termination for Owner Convenience. Notwithstanding anything contained herein to the contrary, Owner may without cause, terminate this agreement at any time upon delivery of written notice to the CMAR. In the event Owner delivers such notice to the CMAR, CMAR agrees to withdraw its employees and its equipment, if any, from the work site on the effective date of the termination as specified in said notice (which effective date shall not be less than two (2) business days after the date of delivery of the notice), regardless of any claim the CMAR may or may not have against the Owner. In the event of such termination, CMAR shall be entitled to any unpaid Cost of the **PROJECT** incurred to the effective date of such termination, and to no compensation other than the fees owed or accrued through the date of termination.

12.02 Termination by the CMAR. In the event that the **PROJECT** is stopped for a period of sixty (60) calendar days by the CMAR for the Owner's failure to make payments thereon, or in the event that Owner shall have otherwise defaulted in its obligations under the terms of this Agreement, the CMAR, upon giving fourteen (14) calendar days written notice of such event of nonpayment or default to the Owner, and upon the expiration of such fourteen (14) calendar day period, if such nonpayment or other event of default has not been cured, the CMAR may terminate this Agreement and demand payment of all of the CMAR's compensation hereof and Owner shall assume and become liable for obligations, commitments and unsettled contractual claims that CMAR has previously undertaken or incurred pursuant to this Agreement.

12.03 Owner's Right to Perform CMAR's Obligations and Termination by Owner for Cause.

(1) If the CMAR fails to timely perform any of his obligations under this Agreement, including any obligation the CMAR assumes to perform work with his own forces, the Owner may, after seven (7) calendar days' written notice, during which period the CMAR fails to perform such obligation, make good such deficiencies and perform such actions. The GMP, or the actual cost of the **PROJECT**, whichever is less, shall be reduced by the cost to the Owner of making good such deficiencies and the CMAR's compensation shall be reduced by an amount required to manage the deficiencies, provided, however, nothing contained herein shall limit or preclude Owner from pursuing additional damages from CMAR as a result of its breach.

(2) If the CMAR is adjudged bankrupt, or if it makes a general assignment for the benefit of its creditors or if a receiver is appointed on account of its insolvency, or if it persistently or repeatedly refuses or fails, except in case for which extension of time is provided, to supply enough properly skilled workmen or proper materials, or fails, without being excused, to maintain an established schedule (failure to maintain schedule shall be defined as any activity on the critical path that falls thirty (30) calendar days or more behind schedule) which has been adopted by the Construction Team, or if it fails to make prompt payment to subcontractors for materials or labor, or disregards laws, rules, ordinances, regulations, or orders of any public authority having jurisdiction, or otherwise is guilty of substantial violations of a provision of the Agreement, then the Owner may, without prejudice to any other right or remedy, and after giving the CMAR and its surety, if any, fourteen (14) calendar days' written notice, and during which period the CMAR fails to cure the violation, terminate the employment of the CMAR and take possession of the Project Site and of all materials, equipment, tools, construction equipment, and machinery thereon owned by the CMAR, and may finish the **PROJECT** by whatever method the Owner may deem expedient. In such case, the CMAR shall not be entitled to receive any further payment. Owner shall be entitled to recover all costs and damages arising as a result of failure of CMAR to perform as provided in this Agreement, as well as reasonable termination expenses and costs and damages incurred by the Owner may be deducted from any payments left owing the CMAR.

12.04 Obligations, Rights and Remedies Cumulative. The specific rights and remedies to which either the Owner or the CMAR are entitled are not exclusive and are intended to be in addition to any other remedies or means of redress to which the Owner or the CMAR may lawfully be entitled and are not specifically prohibited by this Agreement.

12.05 Non-action on Failure to Observe Provisions of This Agreement. The failure of the Owner or the CMAR to promptly insist upon strict performance of any terms, covenant, condition or provision of this Agreement or any exhibit or any other Agreement contemplated hereby, shall not be deemed a waiver of any right or remedy that the Owner or the CMAR may have, and shall not be deemed a waiver of any subsequent default or nonperformance of such term, covenant, condition or provision.

12.06 Litigation. All claims, disputes, or other matters in question between the Owner and the CMAR, arising under the terms of this Agreement and performance hereunder shall be decided by a court of competent jurisdiction, and shall not be the subject of arbitration. The parties agree that with respect to any Agreements executed by and between themselves relating to the **PROJECT** and any other persons or entities performing work on the **PROJECT**, that such agreements will contain a provision such that any disputes shall be resolved in a court of competent jurisdiction, it being the intention of all parties that any dispute be resolved in one consistent forum.

12.07 Attorney's Fees. In any litigation between the parties hereto arising out of this Agreement, the prevailing party shall be entitled to recover all fees and costs incurred in such litigation, including reasonable attorney's fees, through appeals.

ARTICLE 13.
MISCELLANEOUS

13.01 Harmony. CMAR is advised and hereby agrees that it will exert every reasonable and diligent effort to assure that all labor employed by it and its subcontractors for work on the **PROJECT** shall work in harmony with and be compatible with all other labor being used by building and construction contractors now or hereafter on the site of the **PROJECT**. CMAR further agrees that this provision will be included in all subcontracts of the subcontractors as well as the CMAR's own contract; provided, however, that this provision shall not be interpreted or enforced so as to deny or abridge on account of membership or non-membership in any labor union or labor organization, the right of any person to work of the Tennessee Constitution. Owner's liability for obligations, commitments and unsettled contract claims in the event of termination of this Agreement, shall be limited in accordance with an agreed to subcontract termination clause approved by Owner.

13.02 Ownership of Products and Documents. All documents, reports, analysis maps, blueprints, drawings and other papers and products prepared or received by CMAR in connection with this Agreement ("CMAR's work"), upon payment by Owner of fees accrued and owing at the time of CMAR's work shall be the property of Owner and Owner shall have the right to use CMAR's work subsequently without restriction or limitation.

13.03 Disadvantaged Business Enterprises. The CMAR is advised that the Hamilton County Department of Education encourages the utilization of local Disadvantaged Business Enterprise (DBE) participation in District procurement's. CMAR will take all reasonable and necessary affirmative steps to assure that local DBE firms will be utilized for this **PROJECT**.

13.04 Successors and Assignment. No transfer or assignment of the rights and/or obligations of Owner under this Agreement shall be effective without the written consent of the CMAR. No transfer or assignment of the rights and/or obligations of the CMAR under this Agreement shall be effective without

the written consent of the Owner. The terms herein contained shall bind and inure to the benefit of the Owner, its successors and assigns, and the CMAR, its successors and assignments, except as may be otherwise specifically provided herein.

13.05 Notices. All notices, demands, requests for approvals or other communications which may be or are required to be given by either party to the other in writing shall be deemed given and delivered on the date received by the person listed below or the Authorized Representative, or, if notice is by mail, on the date mailed to the address below or, if by hand delivery, on the date delivered to the address below:

To the CMAR	The Christman Company Jeffrey R. Arlington, Vice President 1111 N. Northshore Drive, Suite N-6000, Knoxville, TN 37804
With a copy to: And;	
To the Consultant:	Franklin Associates, Architect, Inc. Robert A. Franklin, AIA, President 142 North Market Street, Chattanooga, TN 37405
With a copy to: And;	
To the Owner	Hamilton County Department of Education 2501 Dodds Ave., Chattanooga, TN 37407
Department of	Maintenance
Project Manager	Justin Witt, Executive Director of Maintenance

The addresses to which notice is to be sent may be changed from time to time by a written notice delivered to each party to this Agreement. Until notice of change of address is received, a party may rely upon the last address given.

13.06 Severability. If any provision of this Agreement is held invalid by a court of competent jurisdiction, the remainder of this Agreement shall not be affected thereby if such reminder would then continue to conform to the requirements of applicable laws and if the remainder of this Agreement can substantially be reasonably performed without material hardship, so as to accomplish the intent and the goals of the parties hereto.

13.07 Applicable Law and Construction. The laws of the State of Tennessee shall govern the validity, performance and enforcement of this Agreement. This Agreement has been negotiated by the Owner and the CMAR, and this Agreement, including the Exhibits, shall not be deemed to have been prepared by either the Owner or the CMAR, and each of them shall be deemed to have participated equally in the preparation hereof.

13.08 Submission to Jurisdiction.

(1) Each party to this Agreement hereby submits to the Jurisdiction of the courts of the State of Tennessee with venue in Hamilton County, Tennessee, for the purposes of any suit, action or other proceeding arising out of or related to this Agreement and hereby agrees not to assert by way of a motion as a defense or otherwise that such action is brought in an inconvenient forum or that the venue of such action is improper or that the subject matter thereof may not be enforced in or by such courts.

(2) The present registered agent of The Christman Company is **Incorp Services, Inc.** the individual designated for service of process by the corporation which is CMAR under the terms of this Agreement, with an address of **1585 Mallory Ln, Suite 104, Brentwood, TN 37027-3036**. If at any

time during the term of this Agreement, the CMAR is not a resident of the State of Tennessee or has no partner, officer, employee or agent thereof available for service of process as a resident of the State of Tennessee, or if any permitted assignee thereof shall be a foreign corporation, partnership or other entity or shall have no officer, employee or agent available for service of process in the State of Tennessee, CMAR hereby designates the Secretary of State, State of Tennessee, its agent for the service of process in any court action between it and the Owner, arising out of or related to this Agreement and such service shall be made as provided by the laws of the State of Tennessee for service upon a nonresident; provided, however, that at the time of service on the Secretary of State, a copy of such service shall be mailed by prepaid, registered mail, return receipt requested, to the CMAR at the address for notices.

13.09 Estoppel Certificates. The CMAR and the Owner shall at any time and from time to time, upon not less than twenty-one (21) calendar days prior notice by the other party, execute, acknowledge and deliver to the other a statement certifying that this Agreement is unmodified and in full force and effect (or if there have been modifications that the same as modified is in full force and effect and setting forth such modifications), the dates to which any changes have been paid in advance, if any, and, to the knowledge of such party, neither it nor the other party is then in default hereof, it being intended that any such statement delivered may be relied upon by any prospective purchaser, mortgagee, assignee of any mortgage or assignee of the respective interests in the **PROJECT**, if any, of either party made in accordance with the provisions of this Agreement.

13.10 Complete Agreement. The written form of this Agreement and the Exhibits supersede and control over any and all prior agreements, understandings, representations and statements, whether written or oral, specifically including, but not limited to the Proposal, made with regard to the matters addressed by this Agreement.

13.11 Captions. The section headings and captions of this Agreement and the table of contents preceding this Agreement are for convenience and reference only and in no way definite, limit or describe the scope or intent of this Agreement, or any part thereof, or in any way affect this Agreement, or construe any article or section hereof.

13.12 Holidays. It is hereby agreed and declared that whenever the time period for a notice or performance under the terms of this Agreement is seven (7) days or greater, and would be made or given or done on a Saturday or Sunday or on a legal holiday observed by the Hamilton County Department of Education, it shall be postponed to the next following business day, not a Saturday, Sunday or legal holiday.

13.13 Exhibits. Each Exhibit referred to in and attached to this Agreement is an essential part of this Agreement. The Exhibits, and any amendments or revisions thereto, even if not physically attached hereto, shall be treated as if they are part of this Agreement.

13.14 Authorized Representatives. Within three (3) business days following the Effective Date of this Agreement, the Owner and the CMAR shall each designate an initial authorized representative (the Project Coordinator as to the Owner) to act on its behalf to the extent and for the duration of the **PROJECT** and shall provide to the other the name, address and specimen signature of such authorized representative. Unless otherwise designated by Owner to the contrary. Thereafter, subsequent or replacement designations may be made as deemed necessary and appropriate by the designating party. Upon such subsequent or replacement designation being made, the designating party shall promptly notify the other party hereto.

13.15 Nondiscrimination. At all times during the construction of the **PROJECT**, including the receipt, evaluation, negotiations and approval of all bids for work to be performed on the **PROJECT**, and the

hiring and discharge of all employees or other personnel, the CMAR shall not discriminate against any person or entity on the basis of race, creed, sex or national origin.

13.16 No General Obligation. In no event shall any obligation of the Owner under this Agreement be or constitute a pledge of the ad valorem taxing power of the Owner within the meaning of the Constitution of the State of Tennessee or any other applicable laws. Neither the CMAR nor any other party under or beneficiary of this Agreement shall ever have the right to compel the exercise of the ad valorem taxing power of the Owner, in any form on any real or personal property to pay the Owner's obligations or undertakings hereunder.

13.17 Members of the Owner Not Liable.

(1) All covenants, stipulations, obligations and agreements of the Owner contained in this Agreement shall be deemed to be covenants, stipulations, obligations and agreements of the Owner to the full extent authorized by the Constitution and laws of the State of Tennessee.

(2) No covenant, stipulation, obligation or agreement contained herein shall be deemed to be a covenant, stipulation, obligation or agreement of any present or future member of the Governing Body or agent or employee of the Owner in its, his or their individual capacity, and neither the members of the Governing Body of the Owner, nor any official executing this Agreement shall be liable personally or shall be subject to any accountability by reason of the execution by the Owner of this Agreement or any act pertaining hereto.

13.18 Relationship of the Parties. No party to this Agreement shall have any responsibility whatsoever with respect to services provided or contractual obligations assumed by the other party to third parties, and nothing in this Agreement shall be deemed to contemplate either party as a partner, agent or local representative of the other party, or relationship between the parties or to create the relationship of employer/employees.

13.19 Maintenance of Records. The CMAR shall keep adequate records and supporting documents applicable to this contractual matter. Said records and documentation will be retained by the CMAR for a minimum of seven (7) years from the date of termination of this Agreement. The Owner and its authorized agents shall have the right to audit, inspect and copy records and documentation as often as the Owner deems necessary during the period of this Agreement and during the period of seven (7) years thereafter; provided, however, such activity shall be conducted only during normal business hours. The Owner, during the period of time expressed by the preceding sentence, shall also have the right to obtain a copy of and otherwise inspect any audit made at the direction of the CMAR as concerns the aforesaid records and documentation.

CMAR specifically acknowledges its obligations to comply with State of Tennessee Regulations, with regard to public records, and shall:

1) keep and maintain public records that ordinarily and necessarily would be required by the Owner in order to perform the services required under this Agreement;
2) upon request from the Owner, provide the Owner with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the agreed upon costs or as otherwise provided by law;
3) ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed, except as authorized by law; and
4) meet all requirements for retaining public records and transfer, at no cost to the Owner, all public records in possession of CMAR upon termination of this Agreement and destroy any duplicate public records that are exempt or confidential and exempt from public records

disclosure requirements. All records stored electronically must be provided to the Owner in a format that is compatible with the information technology system of the Owner.

13.20 Consequential Damages. The Contractor and Owner waive Claims against each other for consequential damages arising out of or relating to this Contract. This mutual waiver includes:

.1 damages incurred by the Owner for income, profit, financing, business and reputation, and for loss of management or employee productivity or of the services of such persons; and

.2 damages incurred by the Contractor for principal office expenses including the compensation of personnel stationed there, for losses of financing, business and reputation, and for loss of profit, except anticipated profit arising directly from the Work.

This mutual waiver is applicable, without limitation, to all consequential damages due to either party's termination. Nothing contained in this Section shall be deemed to preclude assessment of liquidated damages, when applicable, in accordance with the requirements of the Contract Documents. However, this waiver shall not apply to the extent damages are covered by insurance required by Contractor under this Agreement.

IF THE CMAR HAS QUESTIONS REGARDING THE APPLICATION OF TENNESSEE CODE ANNOTATED 10-7-503, TO THE CMAR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THE CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT 423-498-7043, 3074 CLAUDE RAMSEY PARKWAY, CHATTANOOGA, TN 37421.

EXECUTION OF AGREEMENT, the parties have executed this Agreement as of the date last below written.

VENDOR:

_____

Signature Date

_____

Printed Name:

_____

Title

HAMILTON COUNTY DEPARTMENT OF EDUCATION:

Supported by:
Project Sponsoring Department

_____

Signature Date

_____

Printed Name

_____

Title

Approved by:
Hamilton County Department of Education

_____

Signature Date

_____

Printed Name

_____

Title

EXHIBIT A

DEFINITIONS

1. "Agreement" means this Agreement between Owner and Construction Manager, including any Exhibits attached hereto, and any amendments or revisions to this Agreement or any of the exhibits.

2. "Authorized Representative" means the person designated by the Owner and CMAR, respectively, to act on its behalf, pursuant to the terms of this Agreement. The Authorized Representative is referred to herein in this Agreement as Project Coordinator.

3. "Change Order" means a written order to the CMAR signed by the Owner, issued after execution of the Contract, authorizing a change in the Work or an adjustment in the Guaranteed Maximum Price or the Contract Time. The Guaranteed Maximum Price and the Contract Time may be changed only by a Change Order. A Change Order signed by the CMAR indicates his agreement therewith, including the adjustment in the Guaranteed Maximum Price or the Contract Time.

4. "Completion (Final)" means acceptance of the Project by the Owner as evidenced by its signature upon a final payment Certification form and approval thereof by the Owner or their designee. The final payment Certification shall be signed only after the Owner has assured itself by tests, inspections, or otherwise that all of the provisions of the Contract have been carried out as required.

5. "Completion (Substantial)" means an acceptance of the Work by the Owner when construction is sufficiently complete in accordance with the Contract Documents so the Owner can occupy or utilize the work or designated portion thereof for the use for which it is intended. A certificate of occupancy or compliance, when applicable, issued by the Building Official is required concurrent with or prior to issuance of the Certificate of Substantial Completion.

6. "Construction Commencement Date" means the date specified in the Construction Phase Notice to Proceed.

7. "Effective Date of the Agreement" means the date on which the agreement is signed and delivered by the latter of the two parties.

8. "Exhibits" means those agreements, forms of agreements, instruments and other documents attached hereto and designated as exhibits to this Agreement or incorporated by reference into this Agreement.

9. "Field Change Order" is a written change order requested by the AE, accepted by the CMAR, and approved by the Project Coordinator for minor changes in the Work, not involving the adjustments in the Guaranteed Maximum Price or an extension of Time, and not inconsistent with the overall intent of the Contract Documents.

10. "Field Directive Change" is a written directive to the CMAR, issued on or after the effective date of the Agreement ordering an addition, deletion, or revision in the Work, or responding to differing or unforeseen physical conditions under which the Work is to be performed or to emergencies. A Field Directive Change may not change the Guaranteed Maximum Price or the Contract Time, but is evidence that the parties expect that the change directed or documented by a Field Directive Change will be incorporated in a subsequently issued Change Order following negotiations by the parties as to its effect, if any, on the Guaranteed Maximum Price or the Contract Time.

11. "Force Majeure" means those conditions constituting excuse from performance as described in and subject to the conditions described in Paragraph 10.01 hereof.

12. "Guaranteed Maximum Price (GMP)" is established by the CMAR guaranteeing the maximum price to the Owner, for the construction cost of the project.

13. "Owner" means the Hamilton County Department of Education, a Local Education Agency (LEA) of the State of Tennessee, and any successor in interest thereto.

14. "Permitting Authority" means the Hamilton County Department of Education and any other applicable governmental authority acting in its governmental and regulatory capacity, which is required to issue or grant any permit, certificate, or other approval which is required to issue or grant any permit, certificate, or other approval which is required as a condition precedent to the commencement of any construction of the Project, or any part thereof, including the Building Permit.

15. "Project" means the design, construction and equipping of the Project established in the “Agreement between Owner and Construction Manager” and related or appurtenant facilities thereto, in accordance with the Project Plans and Specifications.

16. "Project Architect" or "AE" means Architect or Engineer established in the “Agreement between Owner and Construction Manager” and their successors and assigns, who have been selected by and retained by the Owner to provide the services of licensed architect-engineer for the Project as contemplated by this Agreement.

17. "Project Budget" means the compilation of identified costs for all services to be provided by CMAR, Project Architect and Subcontractors in connection with the planning, design, construction and equipping of the Project in accordance with the Project Plans and Specifications.

18. "Project Plans and Specifications" means the construction drawings and final specifications prepared by the Project Architect and any changes, supplements, amendments or additions thereto approved by the Owner and CMAR, which shall also include any construction drawings and final specifications required for the repair or construction of the Project.

19. "Project Schedule" means the estimated and approximate schedule and sequence of events for the commencement, progression and completion of the Project, and as such schedule may be amended as provided for in the Agreement.

20. "Punch List Completion Date" means the date upon which all previously incomplete or unsatisfactory items, as identified by CMAR, Project Architect and/or Owner are completed in a competent and workmanlike manner, consistent with standards for renovation of this type and with good building practices in the State of Tennessee.

21. "Subcontractor" means any person or organization as defined in Paragraph 6.01 hereof.

End of Exhibit A

EXHIBIT B

PROJECT COSTS

"Project Costs" mean all of the costs incurred by the Owner and CMAR [excluding Part II, below] in planning, constructing and equipping the Project, all of which Project Costs are to be incorporated within the GMP established by the CMAR, and without excluding any cost not listed but which is specifically identified in the Agreement, shall include the following:

PART I

Part IA - Costs Included Within CMAR Fees

Proportion related to this project of:

Salaries or other compensation of the CMAR's officers, partners and/or employees at its principal office and branch offices unless otherwise indicated in Part IB.

CMAR's general operating and overhead expenses of the CMAR's principal and branch offices, and all CMAR profit.

The costs of all data processing staff and data processing equipment.

Licenses.

Principal and branch office supplies including paper, pencils, paper clips, file folders, staples, etc.; janitorial supplies.

Costs for copies of documents created within the PMIS Reporting System and copies of all documents furnished to Owner.

Impact Fees.

Permits.

Part IB – Reimbursable Project Costs Not Included within CMAR Fee (General Conditions)

Wages and salaries of the Construction Manager's Project Manager and Superintendent when stationed at the site with the Owner's agreement.

Expenses such as telephone and facsimile service at the site, long-distance telephone charges, expressage, and postage.

Contractors' public liability and property damage insurance; and Worker's Compensation insurance.

Construction or other work performed by CMAR or otherwise, which, when CMAR is permitted to bid pursuant to this agreement, shall be for the bid price or where such work is performed pursuant to emergency or similar circumstances, shall be for the wages paid for labor in the direct employ of the CMAR (as opposed to wages paid to management or supervisory personnel), and such fringe benefits, if any, as may be payable with respect thereto.

Blueprint/Printing Copies - Costs of all reproductions used for bidding or information which may be distributed to vendors and the public.

Electrical Power consumption (monthly) - temporary construction use only.

Water consumption (monthly) - temporary construction use only.

Cleanup at the job site.

Barricades and safety equipment at the job site.

Temporary fencing and gates at the job site.

Signs at the job site, only sign permitted on site is project sign as defined in construction specification.

Weather protection at the job site.

Construction office trailer at the job site.

Record Drawings.

Progress Photographs/Video.

Owner's Insurance, including Builders Risk and Completed Products and Operations insurance

Cost of all materials, supplies and equipment incorporated by CMAR in the Project, including costs of transportation and storage thereof.

Cost including transportation and maintenance of all materials, supplies, equipment, temporary facilities and hand tools not owned by the workmen, which are employed or consumed in the performance of the work and cost less salvage value on such items used but not consumed which remain the property of the CMAR.

No costs shall be paid by the Owner to the CMAR for any expenses made necessary to correct defective workmanship or to correct any work not in conformance with the Plans and Specifications or to correct any deficiency or damage caused by negligent acts by the CMAR.

Surveys; layout equipment and materials.

Temporary Toilets/holding tanks.

Dumpsters at the job site.

Watchmen at the job site.

All costs directly incurred in the performance of the Project for the benefit of the Project and not included in the CMAR's fees as set forth in the Agreement.

PART II

Owner's Expenses

The Agreement includes items designated or contemplated as items to be provided by Owner, but excluded for the purposes of determination of the project costs or GMP. These items include but may not be limited to the following:

Site conditions (such as hazardous materials, concealed subsurface conditions and assorted tests and corrective measures).

Additional surveys, except construction layout.

Easements and temporary construction easements.

Land use approvals, if required.

Blue Print/Printing copies of the construction documents, plans and specifications.

Additional insurance, if any.

Any additional consultant fees as may be required, additional AE fees, additional CMAR fees.

All furniture, equipment and materials purchased and installed by Owner or other than CMAR.

Previously approved AE fees.

Already paid site acquisition costs.

Already completed Geotechnical and site studies.

Services provided by the Owners employees in planning, constructing and equipping the project.

End of Exhibit B

EXHIBIT C

PRE-CONSTRUCTION PROPOSAL

CMAR-RFP FILE: 26-14

Form 1 (Page 2 of 2)

HAMILTON COUNTY SCHOOLS

COST PROPOSAL FORM

COMPANY NAME: The Christman Company

SOLICITATION: CMAR-RFP 26-14, NORTH RIVER ELEMENTARY SCHOOL CONSTRUCTION MANAGER AT RISK

Having carefully examined the Solicitation/Contract Documents, Contractor/Vendor proposes to furnish the Scope of Services as described herein and within all applicable proposal submission documents for the fee(s) as presented below.

Pricing shall be inclusive of all labor, equipment, supplies, overhead, profit, material, and any other incidental costs required to perform and complete all work as specified in the Solicitation/Contract Documents. All Unit Prices shall be proposal at the nearest whole penny.

HCS requests proposals/proposals be submitted on proposal/proposal forms provided by the HCS for this solicitation. Fee(s) submitted on other forms, other than those provided by the HCS, may be deemed Non-Responsive upon review by and at the sole discretion of the HCS Purchasing Office.

NORTH RIVER ELEMENTARY SCHOOL CONSTRUCTION MANAGER AT RISK

Item	Description	Unit of Measure	Amount / Fee
PRECONSTRUCTION PHASE			
1	Preconstruction Fee: Assume a construction budget of $45,000,000.	Lump Sum	$ 65,000
CONSTRUCTION PHASE **The following fees are for evaluation purposes and shall be finalized as part of the final GMP process.*			
2	Proposed Construction Management Fee: Fee shall include overhead and profit applicable to a construction budget of $45,000,000.	Percentage	2.5 %
3	Proposed General Conditions Costs: Provide general conditions costs based on the General Requirements as stated herein (Fee & Cost Allocations).	Lump Sum	$ 1,650,385
4	Proposed General Liability Insurance Rate	Percentage	.85 %
5	Proposed Builders Risk Rate	Percentage	.20 %
6	Proposed Performance and Payment Bond Rate	Percentage	.70 %

EXHIBIT D

CMAR'S BACKGROUND SCREENING AFFIDAVIT

CMAR-RFP FILE: 26-14

Form 8

Certification of Compliance with Tennessee Public Chapter # 587

The General Assembly of the State of Tennessee requires any person, corporation or other entity who enters into or renews a contract with a local board of education comply with Tennessee Public Chapter #587 (TPC587).

TPC587 requires persons, employees of the person or corporation that have direct contact with school children or access to school grounds when children are present to have supplied to the corporation a fingerprint sample and have conducted a criminal history records check by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the person to have contact with such children or enter school grounds. (The Public Chapter 1080, (D) was amended to: "A person whose contract is for the performance of a service at a school-sponsored activity, assembly or even at which school officials or employees are present when the service is performed and where the activity, assembly, or event is *conducted under the supervision of school officials or employees."*

TPC587 provides guidance for employees who have been convicted of an offense that is classified as a sexual offense or a violent sexual offense.

I have read the attached TENNESSEE PUBLIC CHAPTER # 587 and certify compliance with the regulations.

The Christman Company - 1111 N Northshore Dr, Suite N - 600, Knoxville TN 37919

Name/Address of Organization

Marty E. Gibbs, Sr Vice President & General Manager

Name/Title of Submitting Official

Signature

12/2/2025

Date

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

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

From: Mary Ellen Heuton, Chief Financial Officer

Date: January 15, 2026

Subject: Monthly Financial Report

Board Agenda Category:

- ☑ Consent Agenda
- ☐ Action Item
- ☐ Reports and Information

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

Opportunity 2030 Commitment Connection

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

HAMILTON COUNTY SCHOOLS
REVENUE/EXPENSES VS BUDGET
PERIOD ENDED
November 2025

		General Purpose			Federal Programs			Self-Funded Programs			School Nutrition			Grand Totals		
REVENUES		**Adopted Budget**	**Revised Budget**	**YTD Actual**	**Adopted Budget**	**Revised Budget**	**YTD Actual**	**Adopted Budget**	**Revised Budget**	**YTD Actual**	**Adopted Budget**	**Revised Budget**	**YTD Actual**	**Adopted Budget**	**Revised Budget**	**YTD Actual**
LOCAL TAXES		276,530,590	276,530,590	54,357,783	-	-	-	-	-	-	-	-	-	276,530,590	276,530,590	54,357,783
LICENSES AND PERMITS		13,000	13,000	5,448	-	-	-	-	-	-	-	-	-	13,000	13,000	5,448
CHARGES FOR CURRENT SERVICES		424,000	424,000	215,126	-	-	-	5,203,293	5,214,793	1,990,204	3,718,711	3,718,711	1,651,555	9,346,004	9,357,504	3,856,886
OTHER LOCAL REVENUES		4,396,679	5,266,576	937,193	-	-	-	5,152,154	6,304,137	1,472,513	694,774	694,774	229,261	10,243,607	12,265,487	2,638,966
STATE OF TENNESSEE		294,513,153	303,282,963	115,536,715	-	-	-	-	-	-	-	-	-	294,513,153	303,282,963	115,536,715
OTHER STATE REVENUES		13,632,985	14,077,567	2,237,559	-	-	-	-	-	-	210,000	210,000	-	13,842,985	14,287,567	2,237,559
FEDERAL GOVERNMENT		2,154,770	1,269,525	402,190	36,439,010	50,519,320	7,183,100	-	-	-	25,726,184	25,726,184	9,708,472	64,319,964	77,515,029	17,293,762
OTHER SOURCES		927,480	927,480	-	-	-	-	-	-	-	-	-	395	927,480	927,480	395
RESERVES/FUND BALANCE *		-	7,612,247	-	-	-	-	21,623,109	50,630,616	6,422,562	-	-	-	21,623,109	58,242,863	6,422,562
PY ENCUMBRANCE BUDGET		869,897	11,757,707	-	-	-	-	-	-	-	-	260,577	-	869,897	12,018,283	-
TOTAL REVENUES		**593,462,554**	**621,161,655**	**173,692,016**	**36,439,010**	**50,519,320**	**7,183,100**	**31,978,556**	**62,149,546**	**9,885,279**	**30,349,669**	**30,610,246**	**11,589,683**	**692,229,789**	**764,440,766**	**202,350,077**
EXPENDITURES																
REGULAR INSTRUCTION PROGRAM	71100	245,509,367	261,214,011	88,671,093	5,406,819	9,183,378	2,140,434	4,136,987	4,545,449	1,119,249	-	-	-	255,053,173	274,942,838	91,930,776
SPECIAL EDUCATION INSTR PROG	71200	43,682,602	46,887,659	14,378,511	8,943,157	10,751,079	3,067,938	1,134,693	1,143,084	11,872	-	-	-	53,760,452	58,781,822	17,458,321
VOCATIONAL ED INSTR PROG	71300	20,702,161	20,660,989	6,147,493	680,658	784,859	274,980	75,358	124,588	31,142	-	-	-	21,458,177	21,570,436	6,453,615
STUDENT BODY EDUCATIONAL PROG	71400	4,563,624	4,603,624	121,520	-	-	-	1,000	1,124	-	-	-	-	4,564,624	4,604,748	121,520
ATTENDANCE	72110	7,788,126	8,796,615	2,517,389	74,400	162,838	108,235	-	-	-	-	-	-	7,862,526	8,959,453	2,625,624
HEALTH SERVICES	72120	7,027,172	7,230,772	2,334,329	50,000	201,026	11,303	339,036	354,036	46,680	-	-	-	7,416,208	7,785,834	2,392,313
OTHER STUDENT SUPPORT	72130	28,610,569	30,797,143	10,060,671	5,741,369	8,415,960	1,669,065	220,000	259,245	9,712	-	-	-	34,571,938	39,472,348	11,739,448
REG INST SUPPORT	72210	29,734,786	30,550,478	10,426,069	9,283,328	10,111,615	2,801,527	1,213,948	1,443,807	403,447	-	-	-	40,232,062	42,105,900	13,631,043
SPECIAL ED INST SUPPORT	72220	12,609,004	13,109,531	3,901,943	2,242,397	3,057,579	595,823	-	-	-	-	-	-	14,851,401	16,167,110	4,497,766
VOCATIONAL ED INST SUPPORT	72230	1,201,742	989,881	339,848	10,000	11,200	4,669	-	1,544	(350)	-	-	-	1,211,742	1,002,625	344,167
EDUCATION TECHNOLOGY	72250	9,227,277	9,994,002	4,102,000	-	-	-	-	-	-	-	-	-	9,227,277	9,994,002	4,102,000
BOARD OF EDUCATION	72310	6,928,477	6,832,411	2,158,855	-	-	-	100,000	100,000	13,549	-	-	-	7,028,477	6,932,411	2,172,403
OFFICE OF SUPERINTENDENT	72320	2,873,493	3,091,776	1,033,902	-	-	-	113,877	115,777	38,997	-	-	-	2,987,370	3,207,553	1,072,899
OFFICE OF PRINCIPAL	72410	38,488,175	38,736,656	14,818,473	-	8,160	-	18,000	19,000	4,072	-	-	-	38,506,175	38,763,816	14,822,545
FISCAL SERVICES	72510	4,510,135	5,273,153	1,633,124	-	-	-	-	-	-	-	-	-	4,510,135	5,273,153	1,633,124
HUMAN RESOURCES	72520	4,568,932	4,754,576	1,327,149	155,460	377,842	240,731	50,291	54,791	8,639	-	-	-	4,774,683	5,187,209	1,576,519
OPERATION OF PLANT	72610	35,490,091	35,765,630	11,689,931	-	2,363,622	1,094,104	2,000	10,601	-	-	-	-	35,492,091	38,139,853	12,784,036
MAINTENANCE OF PLANT	72620	12,312,491	13,088,101	5,434,657	-	-	-	-	138,545	121,491	-	-	-	12,312,491	13,226,646	5,556,148
TRANSPORTATION	72710	29,051,159	28,872,439	9,330,331	241,105	669,810	148,642	33,000	68,472	8,650	-	-	-	29,325,264	29,610,721	9,487,623
CENTRAL AND OTHER	72810	2,676,353	3,093,566	357,541	-	-	-	13,000	13,000	350	-	-	-	2,689,353	3,106,566	357,891
FOOD SERVICE	73100	5,850	5,850	2,575	-	-	-	-	-	-	30,349,669	30,610,246	10,800,280	30,355,519	30,616,096	10,802,856
COMMUNITY SERVICES	73300	748,518	773,399	246,686	365,201	375,654	57,054	3,957,973	3,966,723	1,384,185	-	-	-	5,071,692	5,115,776	1,687,925
EARLY CHILDHOOD EDUCATION	73400	2,908,533	3,099,814	1,043,606	2,364,558	2,521,080	806,907	564,643	584,472	170,811	-	-	-	5,837,734	6,205,366	2,021,324
REGULAR CAPITAL OUTLAY	76100	1,461,548	1,479,666	336,379	-	-	-	20,001,000	49,200,386	7,126,640	-	-	-	21,462,548	50,680,052	7,463,018
EDUCATION DEBT SERVICE		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
EDUCATION CAPITAL PROJECTS		-	138,873	-	880,558	1,523,618	-	3,750	4,902	-	-	-	-	884,308	1,667,393	-
CHARTER SCHOOLS (TRANSFERS)		40,782,369	41,321,041	8,504,471	-	-	-	-	-	-	-	-	-	40,782,369	41,321,041	8,504,471
TRANSFERS-STATE GRANTS		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TRANSFERS TO FUND BALANCE		-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TOTAL EXPENDITURES		**593,462,554**	**621,161,655**	**200,918,546**	**36,439,010**	**50,519,320**	**13,021,411**	**31,978,556**	**62,149,546**	**10,499,136**	**30,349,669**	**30,610,246**	**10,800,280**	**692,229,789**	**764,440,766**	**235,239,373**

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

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

From: Mary Ellen Heuton, Chief Financial Officer, Finance

Date: January 15, 2026

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

Board Agenda Category:

- ☑ Consent Agenda
- ☐ Action Item
- ☐ Reports and Information

The Federal Programs budget is amended by items 1 – 10. Items 1 – 6 and 9 consist of current year awards and carryover funds. Items 7 and 8 consist of carryover funds. Item 10 consists of current year awards.

The Self-Funded Programs budget is amended by item 11, which consists of current year contributions.

1. Title I, Part A: Improving Basic Programs, with a net increase of $11,291 and transfers between lines
2. Title II: Teacher and Principal Training and Recruiting Grant, with a net increase of $411 and transfers between lines
3. Title III: Language Instruction for English Learners and Immigrant Students, with a net increase of $3,350 and transfers between lines
4. Title IV, Part A: Student Support and Academic Enrichment Grant, with transfers between lines
5. Title I, Part A: Local Neglected, with a net increase of $141 and transfers between lines
6. Title I, Part D: Delinquent, with a net increase of $27 and transfers between lines
7. Turnaround Action Grant V, with transfers between lines
8. ATSI 24, with transfers between lines
9. Mental Health Service Professionals Grant, with an increase of $1,464,766
10. School Based Mental Health Grant, totaling $1,725,384
11. Hamilton County Government Funds, with a net increase of $362,411

Opportunity 2030 Commitment Connection

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

FEDERAL PROGRAMS
SOURCE OF FUNDS

January 15, 2026

BUDGET AMENDMENTS	FEDERAL THROUGH STATE 47100	DIRECT FEDERAL FUNDS 47990	TOTAL REVENUE	AMENDMENT ITEM #
Title I, Part A: Improving Basic Programs	11,291		11,291	1
Title II, Part A Teacher and Principal Training and Recruiting Grant	411		411	2
Title III: Language Instruction for English Learners and Immigrant Students	3,350		3,350	3
Title IV, Part A: Student Support and Academic Enrichments Grant	-		-	4
Title I, Part A: Local Neglected	141		141	5
Title I, Part D: Delinquent	27		27	6
Turnaround Action Grant V	-		-	7
ATSI 24 Grant	-		-	8
Mental Health Service Professionals Grant		1,464,766	1,464,766	9
School Based Mental Health Grant		1,725,384	1,725,384	10
	15,220	3,190,150	3,205,370	

FEDERAL PROGRAMS
USE OF FUNDS

January 15, 2026

BUDGET AMENDMENTS	REGULAR INSTRUCTION 71100	SPECIAL EDUCATION INSTRUCTION 71200	OTHER STUDENT SUPPORT 72130	REGULAR INSTRUCTION SUPPORT 72210	TRANSPORTATION 72710	INDIRECT COST 99100	TOTAL AMENDMENT AMOUNT	AMENDMENT ITEM #
Title I, Part A: Improving Basic Programs	221,035	(2,447)	(680,742)	311,198	161,910	336	11,291	1
Title II, Part A Teacher and Principal Training a	3,557			(3,158)		12	411	2
Title III: Language Instruction for English Learn	(135,235)		18,150	120,235		200	3,350	3
Title IV, Part A: Student Support and Academic	12,570		41,225	(59,795)	6,000		-	4
Title I, Part A: Local Neglected	136					5	141	5
Title I, Part D: Delinquent	(7,673)			7,700			27	6
Turnaround Action Grant V	16,903		(4,389)	(12,514)			-	7
ATSI 24	(394)		(59)	528		(75)	-	8
Mental Health Service Professionals Grant			1,217,074		15,000	232,692	1,464,766	9
School Based Mental Health Grant			1,639,115			86,269	1,725,384	10
	110,899	(2,447)	2,230,375	364,194	182,910	319,439	3,205,370	

SELF-FUNDED PROGRAMS
SOURCE OF FUNDS

January 15, 2026

BUDGET AMENDMENTS	OTHER GOVERNMENT GROUPS 48000	TOTAL AMENDMENT AMOUNT	AMENDMENT ITEM #
Hamilton County Government Funds	362,411	362,411	11

SELF-FUNDED PROGRAMS
USE OF FUNDS

January 15, 2026

BUDGET AMENDMENTS	REGULAR CAPITAL OUTLAY 76100	TOTAL AMENDMENT AMOUNT	AMENDMENT ITEM #
Hamilton County Government Funds	362,411	362,411	11

HAMILTON COUNTY DEPARTMENT OF EDUCATION
FEDERAL PROGRAMS
TITLE I, PART A: IMPROVING BASIC PROGRAMS
BUDGET FISCAL YEAR 2025-2026
FUND 050
AGENCY 142
ORGANIZATION 101
BUDGET SUMMARY

		AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
	2026 Award	18,638,491	11,291		18,649,782
	2025 Carryover	2,682,676			2,682,676
	Transfer to Consolidated Administration	(1,625,356)			(1,625,356)
	Total Source of Funds	**19,695,811**	**11,291**	**-**	**19,707,102**
	Revenue 141-2-101-0000-0-00000-471410-0000-0000-101	**19,695,811**	**11,291**	**-**	**19,707,102**

FUNCTION	OBJECT	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
71100	116	Teachers	915,426	143,732		1,059,158
71100	134	Instructional Personnel-Interventionists/Tutors	903,150	143,230		1,046,380
71100	163	Educational Assistants	1,311,502	24,158		1,335,660
71100	188	Teacher Bonuses	88,900		(8,500)	80,400
71100	189	Other Salaries and Wages	2,000			2,000
71100	201	Social Security	201,800	18,798		220,598
71100	204	State Retirement	267,641	14,083		281,724
71100	206	Life Insurance	2,066			2,066
71100	207	Health Insurance	710,255	6,075		716,330
71100	208	Dental Insurance	15,186			15,186
71100	210	Unemployment Compensation	724			724
71100	212	Medicare	47,199	4,389		51,588
71100	299	Other Fringe Benefits	11,521			11,521
71100	399	Contracted Services	905,528	28,953		934,481
71100	429	Instructional Supplies & Materials	1,219,138		(223,928)	995,210
71100	471	Software	178,832	4,181		183,013
71100	499	Other Supplies and Materials	-	40,000		40,000
71100	599	Other Charges: Field Trips/Charter Reimbursement	248,495	25,864		274,359
		Total 71100 - Regular Instruction	**7,029,363**	**453,463**	**(232,428)**	**7,250,398**
71200	163	Educational Assistants	164,307			164,307
71200	188	Bonus	11,000		(2,000)	9,000
71200	201	Social Security	10,869		(124)	10,745
71200	204	State Retirement	24,907		(294)	24,613
71200	206	Life Insurance	215			215
71200	207	Health Insurance	71,739			71,739
71200	208	Dental Insurance	1,583			1,583
71200	210	Unemployment Compensation	75			75
71200	212	Medicare	2,514		(29)	2,485
71200	299	Other Fringe Benefits	1,201			1,201
71200	599	Other Charges	40,000			40,000
		Total 71200 - Special Education Program	**328,410**	**-**	**(2,447)**	**325,963**
72120	399	Contracted Services	12,840			12,840
		Total 72120 - Health Services	**12,840**	**-**	**-**	**12,840**

FUNCTION	OBJECT	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
72130	123	Guidance Personnel	103,563	3,680		107,243
72130	130	Social Worker	-	3,680		3,680
72130	1347	ENL Interpreter	41,266			41,266
72130	188	Bonus	57,100			57,100
72130	1896	Parent Volunteer Coordinator	139,480			139,480
72130	1897	Family Partnership Specialist	130,917			130,917
72130	1898	Student Support Coach	27,626	1,520		29,146
72130	1899	Other Salaries & Wages	7,750	2,000		9,750
72130	189B	Truancy Specialist	414,120	4,196		418,316
72130	189G	Behavior Management Specialist	624,275		(9,658)	614,617
72130	201	Social Security	95,843	337		96,180
72130	204	State Retirement	200,787		(1,849)	198,938
72130	206	Life Insurance	1,202		(5)	1,197
72130	207	Health Insurance	401,088		(1,556)	399,532
72130	208	Dental Insurance	8,819		(35)	8,784
72130	210	Unemployment Compensation	422		(1)	421
72130	212	Medicare	22,415	79		22,494
72130	299	Other Fringe Benefits	6,692		(25)	6,667
72130	322	Evaluation and Testing	24,375			24,375
72130	355	Travel	5,000			5,000
72130	399	Contracted Services	428,687		(50,701)	377,987
72130	471	Software	49,026	2,157		51,183
72130	499	Other Supplies & Materials	36,970		(2,086)	34,884
72130	599	Other Charges	1,913,257		(632,475)	1,280,782
		Total 72130 - Other Student Support	**4,740,680**	**17,649**	**(698,391)**	**4,059,939**
72210	104	Coordinator	115,254			115,254
72210	105	Supervisor/Director, Coordinators	104,850			104,850
72210	119	Accountant	18,385			18,385
72210	138	Computer Technician	32,016			32,016
72210	141	Differentiated Compensation	30,700			30,700
72210	162	Classified Extended Contracts	6,550			6,550
72210	172	Instructional Coach	627,998			627,998
72210	188	Bonus	49,000			49,000
72210	1899	Other Salaries	2,500	5,000		7,500
72210	189A	Other Salaries - Centralized	60,671			60,671
72210	189D	District Content Lead	595,764			595,764
72210	189E	Dean	341,368		(22)	341,346
72210	196	In-Service Stipends	268,611	45,765		314,376
72210	201	Social Security	139,712	3,147		142,859
72210	204	State Retirement	200,702	4,854		205,556
72210	206	Life Insurance	977			977
72210	207	Health Insurance	325,840			325,840
72210	208	Dental Insurance	7,181			7,181
72210	210	Unemployment Compensation	344			344
72210	212	Medicare	32,208	739		32,947
72210	299	Other Fringe Benefits	5,450			5,450
72210	355	Travel	14,727			14,727
72210	399	Contracted Services	127,407	157,044		284,451
72210	499	Supplies & Materials (Staff Development)	5,000			5,000
72210	524	Staff Development	238,746	79,521		318,267
72210	599	Other Charges	358,015	15,150		373,165
		Total 72210 - Regular Instruction Support	**3,709,976**	**311,220**	**(22)**	**4,021,174**
72520	105	Coordinator	41,797			41,797
72520	188	Bonus	1,000			1,000
72520	201	Social Security	2,653			2,653
72520	204	State Retirement	3,270			3,270
72520	206	Life Insurance	20			20
72520	207	Health Insurance	6,660			6,660
72520	208	Dental Insurance	147			147
72520	210	Unemployment Compensation	7			7
72520	212	Medicare	902			902
72520	299	Other Fringe Benefits	112			112
72520	399	Contracted Services	225,000			225,000
		Total 72520 - Human Resources/Personnel	**281,568**	**-**	**-**	**281,568**

FUNCTION	OBJECT	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
72710	188	Bonus	2,000			2,000
72710	189	Dispatcher	52,223			52,223
72710	201	Social Security	3,362			3,362
72710	204	State Retirement	4,142			4,142
72710	206	Life Insurance	40			40
72710	207	Health Insurance	13,320			13,320
72710	208	Dental Insurance	294			294
72710	210	Unemployment Compensation	14			14
72710	212	Medicare	787			787
72710	299	Other Fringe Benefits	223			223
72710	314	Choice Transportation	444,693	161,910		606,603
		Total 72710 - Transportation	**521,098**	**161,910**	**-**	**683,008**
73400	116	Teacher Pre-K	1,100,000			1,100,000
73400	163	Educational Assistant Pre-K	400,000			400,000
73400	188	Bonus	28,880			28,880
73400	1,898	Student Support Coach	65,000			65,000
73400	189D	District Content Lead	84,000			84,000
73400	189J	Coordinator	45,000			45,000
73400	201	Social Security	107,000			107,000
73400	204	State Retirement	155,500			155,500
73400	206	Life Insurance	1,400			1,400
73400	207	Health Insurance	454,300			454,300
73400	208	Dental Insurance	10,000			10,000
73400	210	Unemployment Compensation	500			500
73400	212	Medicare	25,100			25,100
73400	299	Other Fringe Benefits	7,700			7,700
73400	355	Travel - Mileage	2,700			2,700
		Total 73400 - Early Childhood Education	**2,487,080**	**-**	**-**	**2,487,080**
99100	504	Indirect Cost (3.06%)	584,796	336		585,132
		Total 99100 - Indirect Cost	**584,796**	**336**	**-**	**585,132**
		TOTAL BUDGET	**19,695,811**	**944,578**	**(933,288)**	**19,707,102**

HAMILTON COUNTY DEPARTMENT OF EDUCATION
FEDERAL PROGRAMS
TITLE I, PART A: IMPROVING BASIC PROGRAMS
BUDGET FISCAL YEAR 2025-2026
FUND 050
AGENCY 142
ORGANIZATION 101
GRANT SUMMARY-BUDGET

FUNCTION-OBJECT	DESCRIPTION	Total	101-0000 Indirect costs & Transfers	101-9* Private Schools	Public & Charter School Support	101-1130 Pre-K Support	101-1110 Homeless Set Aside	101-1120 & 1122 Extended School Day & School Year	101-1140 Reserve Of Funds	101- 1150 Priority Schools Set Aside	101-1160 Family Engagement
71100-511610	Teachers	149,811			73,475			76,336			
71100-5116A0	Teachers - Related Arts	62,471			62,471						
71100-5116G0	Teacher - RTI	41,946			14,884					27,062	
71100-5116H0	Teacher - Intervention	91,358			38,500					52,858	
71100-513450	Instructional Personnel-Interventionist/Tutors	1,046,380			895,155					151,225	
71100-514090	Teachers Supplements	713,572			333,732			264,000		115,840	
71100-516310	Educational Assistants	896,177			558,610					337,567	
71100-516350	Educational Assistants - Behavior	439,483			439,483						
71100-518810	Bonus	80,400			52,400			2,000		26,000	
71100-518990	Other Salaries and Wages	2,000			2,000						
71100-520110	Social Security	220,598			153,349			21,227		46,022	
71100-520410	State Retirement	281,724			205,469			30,810		45,445	
71100-520610	Life Insurance	2,066			1,446			40		580	
71100-520710	Health Insurance	687,966			481,506			13,320		193,140	
71100-520770	Health Insurance - Part-time	28,364			24,614					3,750	
71100-520810	Dental Insurance	15,186			10,629			294		4,263	
71100-521010	Unemployment Compensation	724			507			14		203	
71100-521210	Medicare	51,588			35,860			4,966		10,762	
71100-529910	Long Term Disability	5,529			3,870			107		1,552	
71100-529930	Short Term Disability	5,992			4,194			116		1,682	
71100-539980	Contracted Substitutes	47,816			23,816					24,000	
71100-539990	Contracted Services	886,665		870,165	16,500					-	
71100-542910	Instructional Supplies & Materials	995,210		99,286	879,962					15,962	
71100-547110	Software	183,013		6,000	171,538					5,475	
71100-549990	Other Supplies and Materials	40,000			-					40,000	
71100-559990	Charges-Field Trips, etc	274,359		2,120	188,239			84,000			
	Total 71100 - Regular Instruction	**7,250,398**	**-**	**977,571**	**4,672,209**	**-**	**-**	**497,230**	**-**	**1,103,388**	**-**
71200-516340	Educational Assistant - ExEd	164,307			164,307						
71200-518810	Bonus	9,000			9,000						
71200-520110	Social Security	10,745			10,745						
71200-520410	State Retirement	24,613			24,613						
71200-520610	Life Insurance	215			215						
71200-520710	Health Insurance	71,739			71,739						
71200-520810	Dental Insurance	1,583			1,583						
71200-521010	Unemployment Compensation	75			75						
71200-521210	Medicare	2,485			2,485						
71200-529910	Long Term Disability	576			576						
71200-529930	Short Term Disability	625			625						
71200-559990	Other Charges	40,000			40,000						
	Total 71200 - Special Education Program	**325,963**			**325,963**		**-**	**-**	**-**	**-**	**-**
72120-539990	Contracted Services	12,840		12,840							
	Total 72120 - Health Services	**12,840**	**-**	**12,840**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
72130-512310	Guidance Personnel	107,243			61,740		-			45,503	
72130-513010	Social Worker	3,680			-					3,680	
72130-513470	ENL Interpreter	41,266			41,266						
72130-518810	Other Student Support Bonus	57,100			51,100					6,000	
72130-518960	Parent Volunteer Coordinator	139,480			139,480		-				
72130-518970	Family Partnership Specialist	130,917			86,792					44,125	
72130-518990	Other Salaries & Wages	9,750			9,750						
72130-5189B0	Truancy Specialist	418,316			358,659					59,657	
72130-5189G0	Behavior Management Specialist	614,617			614,617						
72130-520110	Social Security	96,180			84,619					11,561	
72130-520410	State Retirement	198,938			172,474					26,464	
72130-520610	Life Insurance	1,197			1,077					120	
72130-520710	Health Insurance	397,957			357,997					39,960	
72130-520770	Health Insurance - Part-time	1,575			1,575						
72130-520810	Dental Insurance	8,784			7,902					882	
72130-521010	Unemployment Compensation	421			379					42	
72130-521210	Medicare	22,494			19,791					2,703	
72130-529910	Long Term Disability	3,200			2,879					321	
72130-529930	Short Term Disability	3,467			3,119					348	
72130-532210	Evaluation and Testing	24,375		24,375							
72130-535510	Travel	5,000			-					5,000	
72130-539990	Contracted Services	377,987		10,803	119,954		113,230			134,000	
72130-547110	Software	51,183		1,058	50,125						
72130-549990	Materials & Supplies	34,884		4,288	25,163						5,433
72130-559990	Charges-Parent Meeting Expenses	424,631		4,706	419,925						
72130-559990	Other Charges: Set Aside Reserve of Funds	856,151							856,151		
	Total 72130 - Other Student Support	**4,059,939**	**-**	**45,230**	**2,630,383**	**-**	**113,230**	**-**	**856,151**	**409,512**	**5,433**

FUNCTION-OBJECT	DESCRIPTION	Total	101-0000 Indirect costs & Transfers	101-9* Private Schools	Public & Charter School Support	101-1130 Pre-K Support	101-1110 Homeless Set Aside	101-1120 & 1122 Extended School Day & School Year	101-1140 Reserve Of Funds	101- 1150 Priority Schools Set Aside	101-1160 Family Engagement
72210-510530	Coordinators	104,850						-		104,850	
72210-511910	Accountant	18,385								18,385	
72210-513810	Computer Technician	32,016			32,016						
72210-5140M0	Stipend - Multi Classroom Lead	130,000			130,000						
72210-514100	Differentiated Compensation	30,700								30,700	
72210-516210	Classified Extended Contracts	6,550			6,550						
72210-517210	Instructional Coach	627,998			153,132					474,866	
72210-518810	Instruction Support Bonuses	49,000			15,000		2,000	2,000		30,000	
72210-5189A0	Other Salaries - Centralized	60,671					60,671				
72210-5189D0	District Content Lead	595,764			-					595,764	
72210-5189E0	Dean	341,346			341,346						
72210-518990	Other Salary and Wages	7,500			7,500						
72210-519610	Stipends	184,376			163,001					21,375	
72210-520110	Social Security	142,859			52,914		3,566	7,270		79,109	
72210-520410	State Retirement	205,556			74,403		4,686	10,553		115,914	
72210-520610	Life Insurance	977			300		37	40		600	
72210-520710	Health Insurance	325,315			99,900		12,295	13,320		199,800	
72210-520770	Health Insurance - Part-time	525			525						
72210-520810	Dental Insurance	7,181			2,205		271	294		4,411	
72210-521010	Unemployment Compensation	344			105		14	14		211	
72210-521210	Medicare	32,947			12,378		890	1,700		17,979	
72210-529910	Long Term Disability	2,617			804		99	107		1,607	
72210-529930	Short Term Disability	2,833			870		107	116		1,740	
72210-535510	Travel - Local Travel	14,727			-		2,000	2,000		10,727	
72210-539990	Contracted Services	284,451		109,451	-					175,000	
72210-549990	Supplies & Materials (Staff Dev)	5,000			5,000						
72210-552410	Staff Development	318,267		55,556	232,711					30,000	
72210-559990	Staff Training Materials, Mtg expenses	373,165			373,165						
	Total 72210 - Regular Instruction Support	**4,021,174**	**-**	**165,007**	**1,703,825**	**-**	**86,636**	**152,668**	**-**	**1,913,038**	**-**
72520-510530	Coordinator	41,797								41,797	
72520-518810	Bonus	1,000								1,000	
72520-520110	Social Security	2,653								2,653	
72520-520410	State Retirement	3,270								3,270	
72520-520610	Life Insurance	20								20	
72520-520710	Health Insurance	6,660								6,660	
72520-520810	Dental Insurance	147								147	
72520-521010	Unemployment Compensation	7								7	
72520-521210	Medicare	902								902	
72520-529910	Long Term Disability	54								54	
72520-529930	Short Term Disability	58								58	
72520-539990	Contracted Services	225,000								225,000	
	Total 72520 - Human Resources/Personnel	**281,568**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**281,568**	**-**
72710-518810	Bonus	2,000					2,000				
72710-5189A0	Route Dispatcher	52,223					52,223				
72710-520110	Social Security	3,362					3,362				
72710-520410	State Retirement	4,142					4,142				
72710-520610	Life Insurance	40					40				
72710-520710	Health Insurance	13,320					13,320				
72710-520810	Dental Insurance	294					294				
72710-521010	Unemployment Compensation	14					14				
72710-521210	Medicare	787					787				
72710-529910	Long Term Disability	107					107				
72710-529930	Short Term Disability	116					116				
72710-531410	Choice Transportation	606,603		6,350	298,435			181,818		120,000	
	Total 72710 - Transportation	**683,008**	**-**	**6,350**	**298,435**	**-**	**76,405**	**181,818**	**-**	**120,000**	**-**
73400-5116D0	Pre K Teacher	1,100,000				1,100,000					
73400-516330	Educational Assistant Pre-K	400,000				400,000					
73400-518810	Bonus	28,880				28,880					
73400-518980	Student Support Coach	65,000				65,000					
73400-5189D0	District Content Lead	84,000				84,000					
73400-5189J0	Coordinator	45,000				45,000					
73400-520110	Social Security	107,000				107,000					
73400-520410	State Retirement	155,500				155,500					
73400-520610	Life Insurance	1,400				1,400					
73400-520710	Health Insurance	452,800				452,800					
73400-520770	Health Insurance - Part-time	1,500				1,500					
73400-520810	Dental Insurance	10,000				10,000					
73400-521010	Unemployment Compensation	500				500					
73400-521210	Medicare	25,100				25,100					
73400-529910	Long Term Disability	3,700				3,700					
73400-529930	Short Term Disability	4,000				4,000					
73400-535510	Travel - Mileage	2,700				2,700					
	Total 73400 - Early Childhood Education	**2,487,080**				**2,487,080**	**-**	**-**	**-**	**-**	**-**
99100-550410	Indirect Cost (3.06%)	585,132	585,132								
	Total 99100 - Indirect Cost	**585,132**	**585,132**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
	TOTAL BUDGET	**19,707,102**	**585,132**	**1,206,998**	**9,630,815**	**2,487,080**	**276,271**	**831,716**	**856,151**	**3,827,506**	**5,433**

HAMILTON COUNTY DEPARTMENT OF EDUCATION
FEDERAL PROGRAMS
TITLE I, PART A: IMPROVING BASIC PROGRAMS
BUDGET FISCAL YEAR 2025-2026
FUND 060
AGENCY 142
ORGANIZATION 101
PUBLIC & CHARTER SCHOOL SUMMARY--
BUDGET

								298,435	297,857	578			
	Description	**Total**	**Central High 0040**	**East Ridge High 0070**	**Hixson High 0128**	**Ooltewah High 0160**	**Red Bank High 0175**	**Sequoyah High 0196**	**Brainerd 0021**	**HSAT 0137**	**Lookout Val M/H 0165**	**Tyner Mid/High 0238**	**HC Virtual School 0275**
71100-511610	Teachers	73,475											
71100-5116A0	Teacher - Related Arts	62,471											
71100-5116G0	Teacher - RTI	14,884											14,884
71100-5116H0	Teacher - Intervention	38,500											
71100-513450	Instructional Personnel-Interventionist/Tutors	895,155			20,650	26,550							
71100-514090	Teachers Supplements	333,732		20,000	17,800	20,000	5,712	4,320		82,239	4,000	33,000	
71100-516310	Educational Assistants	558,610		30,139	34,100								
71100-516350	Educational Assistants - Behavior	439,483	34,390			34,100	66,106				31,935	26,100	
71100-518810	Bonus	52,400	2,000	2,000	2,000	-	4,000				2,000	-	-
71100-518990	Other Salaries and Wages	2,000											
71100-520110	Social Security	153,349	2,256	3,233	4,623	5,000	4,700	268		5,099	2,352	3,664	923
71100-520410	State Retirement	205,469	5,349	6,524	6,909	5,000	10,735	389		8,542	5,348	8,254	1,345
71100-520610	Life Insurance	1,446	40	40	40	40	80				40	40	10
71100-520710	Health Insurance	481,506	13,320	13,320	13,320	13,320	26,640				13,320	13,320	3,330
71100-520770	Health Insurance - Part-time	24,614			525	525							
71100-520810	Dental Insurance	10,629	294	294	294	294	588				294	294	74
71100-521010	Unemployment Compensation	507	14	14	14	14	28				14	14	4
71100-521210	Medicare	35,860	528	756	1,081	1,169	1,099	63		1,192	550	857	216
71100-529910	Long Term Disability	3,870	107	107	107	107	214				107	107	27
71100-529930	Short Term Disability	4,194	116	116	116	116	232				116	116	29
71100-533610	Maintenance & Repair - Equipment	-											
71100-539980	Contracted Services - Substitutes	23,816								963			
71100-539990	Contracted Services-SES, Storytellers	16,500											
71100-542910	Instructional Supplies & Materials	879,962	8,986	40,895	37,512	29,010	9,601	13,129	53,136	61,575	9,549	25,727	2,400
71100-547110	Instructional Software	171,538							5,000			6,000	3,800
71100-559990	Charges: field trips, etc	188,239				10,000				10,000		9,055	4,735
	Total 71100 - Regular Instruction	**4,672,209**	**67,400**	**117,438**	**139,091**	**145,245**	**129,735**	**18,169**	**58,136**	**169,610**	**69,625**	**126,548**	**31,777**
71200-516340	Education Assistant - ExEd	164,307		31,549									
71200-518810	Bonus	9,000		2,000									
71200-520110	Social Security	10,745		2,080									
71200-520410	State Retirement	24,613		4,932									
71200-520610	Life Insurance	215		40									
71200-520710	Health Insurance	71,739		13,320									
71200-520810	Dental Insurance	1,583		294									
71200-521010	Unemployment Compensation	75		14									
71200-521210	Medicare	2,485		486									
71200-529910	Long Term Disability	576		107									
71200-529930	Short Term Disability	625		116									
71200-559990	Other Charges	40,000											
	Total 71200 - Special Education Program	**325,963**	**-**	**54,938**		**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
72130-512310	Guidance Personnel	61,740	60,940										
72130-513470	ENL Interpreter	41,266											
72130-518810	Other Student Support Bonus	51,100	2,000	2,000	1,000		2,000		6,000	8,000		6,000	
72130-518960	Parent Volunteer Coordinator	139,480											
72130-518970	Family Partnership Specialist	86,792								2,287		50,891	
72130-5189B0	Truancy Specialist	358,659		51,655	27,500					111,465			
72130-5189G0	Behavior Management Specialist	614,617					44,764		137,487	94,202		101,200	
72130-518990	Other Salaries	9,750											
72130-520110	Social Security	84,619	3,902	3,327	1,767		2,899		8,896	13,389		9,801	
72130-520410	State Retirement	172,474	5,665	7,887	4,190		6,018		21,093	21,755		22,885	
72130-520610	Life Insurance	1,077	40	40	20		40		120	163		120	
72130-520710	Health Insurance	357,997	13,320	13,320	6,660		13,320		39,960	54,004		39,960	
72130-520770	Health Insurance - Part-time	1,575											
72130-520810	Dental Insurance	7,902	294	294	147		294		882	1,192		882	
72130-521010	Unemployment Compensation	379	14	14	7		14		42	57		42	
72130-521210	Medicare	19,791	913	778	413		678		2,081	3,132		2,292	
72130-529910	Long Term Disability	2,879	107	107	54		107		321	434		321	
72130-529930	Short Term Disability	3,119	116	116	58		116		348	471		348	
72130-535510	Travel - mileage	-											
72130-539990	Contracted Services	119,954		29,000									500
72130-547110	Software	50,125		3,000								11,529	
72130-549990	Parent Involvement Supplies & Materials	25,163									1,946	3,150	
72130-559990	Charges-Parent Mtg expenses	419,925	4,205	6,103	8,000	7,500	7,535	3,000	5,241	15,000		4,000	2,901
72130-579010	Parent Resource Equipment	-											
	Total 72130 - Other Student Support	**2,630,383**	**91,516**	**117,641**	**49,816**	**7,500**	**77,785**	**3,000**	**222,471**	**325,551**	**1,946**	**253,421**	**3,401**
72210-513810	Computer Technician	32,016								32,016			
72210-5140M0	Stipend - Multi Classroom Lead	130,000				10,000						40,000	
72210-516210	Classified Extended Contract	6,550	2,500								2,500		
72210-517210	Instructional Coach	153,132									3,700		
72210-518810	Instructional Support Bonuses	15,000		2,000						4,000			
72210-5189E0	Dean	341,346	29,070	65,111						61,325			
72210-518990	Other salaries and wages	7,500											
72210-519610	Stipends	163,001					4,680	7,780		5,000			
72210-520110	Social Security	52,914	1,957	4,161		620	290	482		6,531	384	2,480	
72210-520410	State Retirement	74,403	368	6,040		900	420	700		8,991	701	3,600	
72210-520610	Life Insurance	300		40						80			
72210-520710	Health Insurance	99,900		13,320						26,640			
72210-520770	Health Insurance - Part-time	525	525										
72210-520810	Dental Insurance	2,205		294						588			
72210-521010	Unemployment Compensation	105		14						28			
72210-521210	Medicare	12,378	458	973		145	68	113		1,528	90	580	
72210-529910	Long Term Disability	804		107						214			
72210-529930	Short Term Disability	870		116						232			
72210-549990	Other Supplies (Staff Development)	5,000											
72210-552410	Staff Development	232,711	10,000	15,000		18,703	736	5,000		12,000		25,000	
72210-559990	Staff Training Materials, Mtg expenses	373,165											
	Total 72210 - Regular Instruction Support	**1,703,825**	**44,878**	**107,176**	**-**	**30,368**	**6,194**	**14,075**	**-**	**159,173**	**7,375**	**71,660**	**-**
72710-531410	Contracts w Public Carriers	298,435				28,350	5,000		40,000	30,000		15,000	5,423
	Total 72710 - Transportation	**298,435**	**-**	**-**	**-**	**28,350**	**5,000**		**40,000**	**30,000**	**-**	**15,000**	**5,423**
	GRAND TOTAL	**9,630,815**	**203,794**	**397,193**	**188,907**	**211,463**	**218,714**	**35,244**	**320,607**	**684,334**	**78,946**	**466,629**	**40,601**

HAMILTON COUNTY DEPARTMENT OF EDUCATION
FEDERAL PROGRAMS
TITLE I, PART A: IMPROVING BASIC PROGRAMS
BUDGET FISCAL YEAR 2025-2026
FUND 060
AGENCY 142
ORGANIZATION 101
PUBLIC & CHARTER SCHOOL SUMMARY--
BUDGET

	Description	Charter Chattanooga Girls Leadership 8001	Charter Chattanooga Charter Sch of Excellence 8003	Charter Chatt Academy Community School 8006	Charter Chattanooga Charter Sch Middle 8010	Charter Chattanooga Charter High School 8015	Charter Chattanooga Prepatory School 8011	Charter CGLA Montessori School 8142	Brown Middle 0035	East Ridge Mid 0075	Ooltewah Middle 0157	Red Bank Middle 0180	Howard Connect Academy 0098
71100-511610	Teachers												
71100-5116A0	Teacher - Related Arts												
71100-5116G0	Teacher - RTI												
71100-5116H0	Teacher - Intervention											38,500	
71100-513450	Instructional Personnel-Interventionist/Tutors								23,925				
71100-514090	Teachers Supplements								9,100	21,606	15,080		4,200
71100-516310	Educational Assistants												
71100-516350	Educational Assistants - Behavior								-	16,225		21,096	
71100-518810	Bonus								-	1,000		1,400	
71100-518990	Other Salaries and Wages									2,000			
71100-520110	Social Security								2,047	2,530	935	3,912	260
71100-520410	State Retirement								819	4,761	1,351	3,208	378
71100-520610	Life Insurance								-	20		56	
71100-520710	Health Insurance									6,660		18,648	
71100-520770	Health Insurance - Part-time								500				
71100-520810	Dental Insurance								-	147		412	
71100-521010	Unemployment Compensation								-	7		20	
71100-521210	Medicare								479	593	219	915	61
71100-529910	Long Term Disability								-	54		150	
71100-529930	Short Term Disability								-	58		162	
71100-533610	Maintenance & Repair - Equipment												
71100-539980	Contracted Services - Substitutes												
71100-539990	Contracted Services-SES, Storytellers												
71100-542910	Instructional Supplies & Materials	31,309	-	3,675	-	-	-	30,977	41,274	29,925	5,294	3,003	3,025
71100-547110	Instructional Software	31,866					3,840	26,874	864	14,416	5,218		5,000
71100-559990	Charges: field trips, etc		11,625					74,452		800			-
	Total 71100 - Regular Instruction	**63,175**	**11,625**	**3,675**	**-**	**-**	**3,840**	**132,303**	**79,008**	**100,802**	**28,097**	**91,482**	**12,924**
71200-516340	Education Assistant - ExEd												
71200-518810	Bonus												
71200-520110	Social Security												
71200-520410	State Retirement												
71200-520610	Life Insurance												
71200-520710	Health Insurance												
71200-520810	Dental Insurance												
71200-521010	Unemployment Compensation												
71200-521210	Medicare												
71200-529910	Long Term Disability												
71200-529930	Short Term Disability												
71200-559990	Other Charges			40,000									
	Total 71200 - Special Education Program	**-**	**-**	**40,000**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
72130-512310	Guidance Personnel												
72130-513470	ENL Interpreter												
72130-518810	Other Student Support Bonus											1,400	
72130-518960	Parent Volunteer Coordinator												
72130-518970	Family Partnership Specialist										-		
72130-5189B0	Truancy Specialist											36,160	
72130-5189G0	Behavior Management Specialist												
72130-518990	Other Salaries										6,000		
72130-520110	Social Security										372	2,329	
72130-520410	State Retirement										654	5,048	
72130-520610	Life Insurance											28	
72130-520710	Health Insurance											9,324	
72130-520770	Health Insurance - Part-time										-		
72130-520810	Dental Insurance											206	
72130-521010	Unemployment Compensation											10	
72130-521210	Medicare										87	545	
72130-529910	Long Term Disability											75	
72130-529930	Short Term Disability											81	
72130-535510	Travel - mileage												
72130-539990	Contracted Services									29,000			
72130-547110	Software								2,136	7,069		-	
72130-549990	Parent Involvement Supplies & Materials	300					3,079		500	1,500	1,500		500
72130-559990	Charges-Parent Mtg expenses	14,112	124,970	1,022	91,551	1,126	40,956	2,183	2,516	2,650	2,000	3,614	4,586
72130-579010	Parent Resource Equipment												
	Total 72130 - Other Student Support	**14,412**	**124,970**	**1,022**	**91,551**	**1,126**	**44,035**	**2,183**	**5,152**	**40,219**	**10,613**	**58,820**	**5,086**
72210-513810	Computer Technician												
72210-5140M0	Stipend - Multi Classroom Lead												
72210-516210	Classified Extended Contract									300			
72210-517210	Instructional Coach												
72210-518810	Instructional Support Bonuses									2,000	1,000		
72210-5189E0	Dean									78,121	40,224		
72210-518990	Other salaries and wages										2,500		
72210-519610	Stipends									3,600		23,870	1,500
72210-520110	Social Security									5,209	2,711	1,480	93
72210-520410	State Retirement									7,578	4,078	2,150	135
72210-520610	Life Insurance									40	20		
72210-520710	Health Insurance									13,320	6,660		
72210-520770	Health Insurance - Part-time												
72210-520810	Dental Insurance									294	147		
72210-521010	Unemployment Compensation									14	7		
72210-521210	Medicare									1,218	634	346	22
72210-529910	Long Term Disability									107	54		
72210-529930	Short Term Disability									116	58		
72210-549990	Other Supplies (Staff Development)									5,000			
72210-552410	Staff Development							5,000	3,875	5,395			
72210-559990	Staff Training Materials, Mtg expenses	80,658	87,512		26,045	76,950	102,000						
	Total 72210 - Regular Instruction Support	**80,658**	**87,512**	**-**	**26,045**	**76,950**	**102,000**	**5,000**	**3,875**	**122,312**	**58,093**	**27,846**	**1,750**
72710-531410	Contracts w Public Carriers			17,457					10,000	1,000	25,000		-
	Total 72710 - Transportation	**-**	**-**	**17,457**	**-**	**-**	**-**	**-**	**10,000**	**1,000**	**25,000**	**-**	**-**
	GRAND TOTAL	**158,245**	**224,107**	**62,154**	**117,596**	**78,076**	**149,875**	**139,486**	**98,035**	**264,333**	**121,803**	**178,148**	**19,760**

HAMILTON COUNTY DEPARTMENT OF EDUCATION
FEDERAL PROGRAMS
TITLE I, PART A: IMPROVING BASIC PROGRAMS
BUDGET FISCAL YEAR 2025-2026
FUND 050
AGENCY 142
ORGANIZATION 101
PUBLIC & CHARTER SCHOOL SUMMARY--
BUDGET

	Description	Dalewood Middle 0055	East Lake Academy 0064	Hixson Middle 0129	Orchard Knob Middle 0200	Soddy Daisy Middle 0225	Alpine Crest 0010	East Ridge Elem 0065	Middle Valley Elem 0085	Harrison Elem 0090	Wolftever Creek Elem 0148	Red Bank Elem 0171	Spring Creek Elem 0235	Barger Acad 0097	Clifton Hills Elem 0048	Donaldson Elem 0037	Daisy Elem 0050
71100-511610	Teachers																
71100-5116A0	Teacher - Related Arts		5,722												56,749		
71100-5116G0	Teacher - RTI																
71100-5116H0	Teacher - Intervention																
71100-513450	Instructional Personnel-Interventionist/Tutors						-	69,600	28,800	59,100	62,540	28,800	37,500	53,940		29,550	
71100-514090	Teachers Supplements	22,325		8,000	11,950	5,600		2,000								-	
71100-516310	Educational Assistants	-			-		21,240	64,900		68,067			118,481			29,288	32,450
71100-516350	Educational Assistants - Behavior					30,138		34,100				60,270					
71100-518810	Bonus		-		-	2,000		6,000		8,000		4,000	4,000		-	4,000	2,000
71100-518990	Other Salaries and Wages																
71100-520110	Social Security	1,385	355	496	741	2,340	1,317	10,949	1,786	8,380	3,877	5,770	9,919	3,344	3,518	3,896	2,136
71100-520410	State Retirement	2,295	458	720	1,075	5,228		15,615		19,870		7,294	18,286		5,107	9,238	5,064
71100-520610	Life Insurance		5		-	40		120		160		80	160		40	80	40
71100-520710	Health Insurance		1,525		-	13,320		39,960		53,280		26,640	53,280		13,320	26,640	13,320
71100-520770	Health Insurance - Part-time	-					525	2,100	1,050		1,575	1,050	1,050	1,575			
71100-520810	Dental Insurance		34		-	294		882		1,176		588	1,176		294	588	294
71100-521010	Unemployment Compensation		2		-	14		42		56		28	56		14	28	14
71100-521210	Medicare	324	83	116	173	547	308	2,561	418	1,960	907	1,350	2,320	782	823	912	500
71100-529910	Long Term Disability		13		-	107		321		428		214	428		107	214	107
71100-529930	Short Term Disability		14		-	116		348		464		232	464		116	232	116
71100-533610	Maintenance & Repair - Equipment																
71100-539980	Contracted Services - Substitutes			2,100		3,000	2,000		5,900								3,600
71100-539990	Contracted Services-SES, Storytellers														5,500	5,500	
71100-542910	Instructional Supplies & Materials	3,385	40,218	30,123	1,320	6,231	6,292	22,876	14,601	32,225	20,828	5,000	17,650	9,690	47,656	5,938	2,950
71100-547110	Instructional Software		21,618	8,826	8,000	-			-							6,300	
71100-559990	Charges: field trips, etc					-			10,000						14,000	1,000	
	Total 71100 - Regular Instruction	**29,714**	**70,047**	**50,381**	**23,259**	**68,975**	**31,682**	**272,374**	**62,555**	**253,166**	**89,727**	**141,316**	**264,770**	**69,331**	**147,244**	**123,404**	**62,591**
71200-516340	Education Assistant - ExEd	11,258						34,100									
71200-518810	Bonus	1,000						2,000									
71200-520110	Social Security	760						2,238									
71200-520410	State Retirement	937						5,307									
71200-520610	Life Insurance	15						40									
71200-520710	Health Insurance	5,139						13,320									
71200-520810	Dental Insurance	113						294									
71200-521010	Unemployment Compensation	5						14									
71200-521210	Medicare	150						523									
71200-529910	Long Term Disability	41						107									
71200-529930	Short Term Disability	45						116									
71200-559990	Other Charges																
	Total 71200 - Special Education Program	**19,463**	**-**	**-**	**-**	**-**	**-**	**58,059**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**
72130-512310	Guidance Personnel				800												
72130-513470	ENL Interpreter			41,266													
72130-518810	Other Student Support Bonus	2,000	4,000	2,000	2,000						-			2,000	2,000		
72130-518960	Parent Volunteer Coordinator		58,496								26,870			21,111			
72130-518970	Family Partnership Specialist	33,614															
72130-5189B0	Truancy Specialist			-											55,481		
72130-5189G0	Behavior Management Specialist		26,042		43,240		27,621							44,765			
72130-518990	Other Salaries								1,250								2,500
72130-520110	Social Security	2,284	5,500	2,683	2,855		1,713		78		1,666			4,208	3,564		155
72130-520410	State Retirement	5,416	11,199	6,360	3,691				184		3,950			6,874	8,450		368
72130-520610	Life Insurance	31	101	40	40						40			40	40		
72130-520710	Health Insurance	10,390	33,197	13,320	13,320						13,320			13,320	13,320		
72130-520770	Health Insurance - Part-time						525							525			
72130-520810	Dental Insurance	229	733	294	294						294			294	294		
72130-521010	Unemployment Compensation	11	36	14	14						14			14	14		
72130-521210	Medicare	534	1,287	627	668		401		18		390			984	833		36
72130-529910	Long Term Disability	83	268	107	107						107			107	107		
72130-529930	Short Term Disability	90	290	116	116						116			116	116		
72130-535510	Travel - mileage																
72130-539990	Contracted Services						-	29,000					30,554				
72130-547110	Software	2,473	3,964			1,000	4,725		2,100				500		4,629		
72130-549990	Parent Involvement Supplies & Materials					-		2,000	1,500				1,000			120	
72130-559990	Charges-Parent Mtg expenses			3,093	1,912	1,981	4,313	4,068	5,000	4,789	-	3,489	1,575			2,382	5,002
72130-579010	Parent Resource Equipment	-															
	Total 72130 - Other Student Support	**57,155**	**145,113**	**69,920**	**69,057**	**2,981**	**39,298**	**35,068**	**10,130**	**4,789**	**46,767**	**3,489**	**33,629**	**94,358**	**88,848**	**2,502**	**8,061**
72210-513810	Computer Technician																
72210-5140M0	Stipend - Multi Classroom Lead		30,000		10,000										10,000		
72210-516210	Classified Extended Contract								1,250								
72210-517210	Instructional Coach														33,397		
72210-518810	Instructional Support Bonuses														1,000		
72210-5189E0	Dean																
72210-518990	Other salaries and wages																
72210-519610	Stipends		5,000	1,000			500	500	11,700				1,500		10,000	12,500	2,760
72210-520110	Social Security		2,170	62	620		31	31	803				93		3,373	775	171
72210-520410	State Retirement		3,150	90	900		45	45	1,235				135		4,896	1,125	248
72210-520610	Life Insurance														20		
72210-520710	Health Insurance														6,660		
72210-520770	Health Insurance - Part-time																
72210-520810	Dental Insurance														147		
72210-521010	Unemployment Compensation														7		
72210-521210	Medicare		508	15	145		7	7	188				22		789	182	40
72210-529910	Long Term Disability														54		
72210-529930	Short Term Disability														58		
72210-549990	Other Supplies (Staff Development)																
72210-552410	Staff Development		5,000	4,000		7,000	2,872		25,250	6,330		13,816			7,970	10,190	
72210-559990	Staff Training Materials, Mtg expenses																
	Total 72210 - Regular Instruction Support	**-**	**45,828**	**5,167**	**11,665**	**7,000**	**3,455**	**583**	**40,426**	**6,330**	**-**	**13,816**	**1,750**	**-**	**78,371**	**24,772**	**3,219**
72710-531410	Contracts w Public Carriers	4,000	2,500		15,575	1,400			7,000		4,200		7,538	4,000	5,500	1,500	
	Total 72710 - Transportation	**4,000**	**2,500**	**-**	**15,575**	**1,400**	**-**	**-**	**7,000**	**-**	**4,200**	**-**	**7,538**	**4,000**	**5,500**	**1,500**	**-**
	GRAND TOTAL	**110,332**	**263,488**	**125,468**	**119,556**	**80,356**	**74,435**	**366,084**	**120,111**	**264,285**	**140,694**	**158,621**	**307,687**	**167,689**	**319,963**	**152,178**	**73,871**

HAMILTON COUNTY DEPARTMENT OF EDUCATION
FEDERAL PROGRAMS
TITLE I, PART A: IMPROVING BASIC PROGRAMS
BUDGET FISCAL YEAR 2025-2026
FUND 060
AGENCY 142
ORGANIZATION 101
PUBLIC & CHARTER SCHOOL SUMMARY--
BUDGET

	Description	Dupont Elem 0058	East Brainerd Elem 0062	East Lake Elem 0063	Eastside Elem 0078	Hardy Elem 0110	Hixson Elem 0127	North Hamilton Co Elem 0147	Lookout Valley Elem 0241	Orchard Knob Elem 0194	Rivermont Elem 0183	Shepherd Elem 0017	Snow Hill Elem 0215	Woodmore Elem 0245	Brown Acad 0033	Battle Acad 0016
71100-511610	Teachers											73,475				
71100-5116A0	Teacher - Related Arts															
71100-5116G0	Teacher - RTI															
71100-5116H0	Teacher - Intervention															
71100-513450	Instructional Personnel-Interventionist/Tutors	57,420	-			43,750	43,245	56,360	13,125	11,250	40,120		83,050	45,700	60,180	
71100-514090	Teachers Supplements		12,200	23,000			1,600				3,000		7,000			
71100-516310	Educational Assistants			56,711	49,324					29,275					24,635	
71100-516350	Educational Assistants - Behavior						55,378			29,645						
71100-518810	Bonus			2,000	2,000		2,000			2,000		-				
71100-518990	Other Salaries and Wages															
71100-520110	Social Security	3,560	756	5,066	3,182	2,713	6,339	3,494	814	4,475	2,673	4,555	5,584	2,833	5,294	
71100-520410	State Retirement		1,098	10,700	7,545		4,940		1,050	8,955	270	6,613	630	1,160	3,346	
71100-520610	Life Insurance			80	40		40			80		40			35	
71100-520710	Health Insurance			26,640	13,320		13,320			26,640		13,320			11,783	
71100-520770	Health Insurance - Part-time	1,313	-			1,050	1,613	2,025	525	263	1,050		3,075	1,575	1,650	
71100-520810	Dental Insurance			588	294		294			588		294			260	
71100-521010	Unemployment Compensation			28	14		14			28		14			12	
71100-521210	Medicare	832	177	1,185	744	634	1,483	817	190	1,046	626	1,065	1,307	662	1,230	
71100-529910	Long Term Disability			214	107		107			214		107			95	
71100-529930	Short Term Disability			232	116		116			232		116			103	
71100-533610	Maintenance & Repair - Equipment															
71100-539980	Contracted Services - Substitutes	2,333								1,920				2,000		
71100-539990	Contracted Services-SES, Storytellers			-										5,500		
71100-542910	Instructional Supplies & Materials	13,182	18,532	38,377	34,368	9,523	1,454	-	17,654	10,516	11,375	1,500	8,529	1,448	6,519	
71100-547110	Instructional Software		4,400	5,000	11,316	3,200					-					
71100-559990	Charges: field trips, etc			30,000					5,000	5,572				2,000		
	Total 71100 - Regular Instruction	**78,640**	**37,163**	**199,821**	**122,370**	**60,870**	**131,943**	**62,696**	**38,358**	**132,699**	**59,114**	**101,099**	**109,175**	**62,878**	**115,142**	**-**
71200-516340	Education Assistant - ExEd		87,400													
71200-518810	Bonus		4,000													
71200-520110	Social Security		5,667													
71200-520410	State Retirement		13,437													
71200-520610	Life Insurance		120													
71200-520710	Health Insurance		39,960													
71200-520810	Dental Insurance		882													
71200-521010	Unemployment Compensation		42													
71200-521210	Medicare		1,326													
71200-529910	Long Term Disability		321													
71200-529930	Short Term Disability		348													
71200-559990	Other Charges															
	Total 71200 - Special Education Program	**-**	**153,503**	**-**	**-**	**-**	**-**			**-**	**-**	**-**	**-**	**-**	**-**	**-**
72130-512310	Guidance Personnel															
72130-513470	ENL Interpreter															
72130-518810	Other Student Support Bonus					3,000	500			2,000		3,000		200		
72130-518960	Parent Volunteer Coordinator							1,213				31,790				
72130-518970	Family Partnership Specialist															
72130-5189B0	Truancy Specialist					29,080	13,750					33,568				
72130-5189G0	Behavior Management Specialist					46,907				42,842				5,547		
72130-518990	Other Salaries															
72130-520110	Social Security					4,897	884	75		2,780		4,238		357		
72130-520410	State Retirement					11,611	2,095			6,592		10,049		440		
72130-520610	Life Insurance					60	10			40		60		4		
72130-520710	Health Insurance					19,980	3,330			13,320		19,980		1,332		
72130-520770	Health Insurance - Part-time							525								
72130-520810	Dental Insurance					441	74			294		441		29		
72130-521010	Unemployment Compensation					21	4			14		21		2		
72130-521210	Medicare					1,145	207	18		650		991		83		
72130-529910	Long Term Disability					161	27			107		161		11		
72130-529930	Short Term Disability					174	29			116		174		12		
72130-535510	Travel - mileage															
72130-539990	Contracted Services	600								600			700			
72130-547110	Software			7,000												
72130-549990	Parent Involvement Supplies & Materials	600	2,400		3,000				1,133	435			500			
72130-559990	Charges-Parent Mtg expenses	594	3,571		670	2,836	2,879		1,467	2,211	5,000		1,560	2,209	1,898	2,655
72130-579010	Parent Resource Equipment															
	Total 72130 - Other Student Support	**1,794**	**5,971**	**7,000**	**3,670**	**120,313**	**23,789**	**1,831**	**2,600**	**72,001**	**5,000**	**104,473**	**2,760**	**10,226**	**1,898**	**2,655**
72210-513810	Computer Technician															
72210-5140M0	Stipend - Multi Classroom Lead		30,000													
72210-516210	Classified Extended Contract															
72210-517210	Instructional Coach			7,500	72,646									35,889		
72210-518810	Instructional Support Bonuses				2,000									1,000		2,000
72210-5189E0	Dean			3,800												63,695
72210-518990	Other salaries and wages													5,000		
72210-519610	Stipends	10,500	1,000	31,571	15,000			3,900			6,150	1,000		550	1,440	
72210-520110	Social Security	651	1,922	2,659	5,558			242			381	62		2,749	89	4,074
72210-520410	State Retirement	945	2,790	3,858	8,068			353			553	90		4,174	130	5,912
72210-520610	Life Insurance				40									20		40
72210-520710	Health Insurance				13,320									6,660		13,320
72210-520770	Health Insurance - Part-time															
72210-520810	Dental Insurance				294									147		294
72210-521010	Unemployment Compensation				14									7		14
72210-521210	Medicare	152	450	622	1,300			56			89	15		642	21	953
72210-529910	Long Term Disability				107									54		107
72210-529930	Short Term Disability				116									58		116
72210-549990	Other Supplies (Staff Development)															
72210-552410	Staff Development	8,000		8,947			2,665			3,500	4,450	14,228		3,034		4,750
72210-559990	Staff Training Materials, Mtg expenses															
	Total 72210 - Regular Instruction Support	**20,248**	**36,162**	**58,957**	**118,463**	**-**	**2,665**	**4,551**	**-**	**3,500**	**11,623**	**15,395**	**-**	**59,984**	**1,680**	**95,275**
72710-531410	Contracts w Public Carriers	3,600	9,397	30,000			2,000		5,000	2,420	1,800			1,000	3,000	9,775
	Total 72710 - Transportation	**3,600**	**9,397**	**30,000**	**-**	**-**	**2,000**	**-**	**5,000**	**2,420**	**1,800**	**-**	**-**	**1,000**	**3,000**	**9,775**
	GRAND TOTAL	**104,282**	**242,196**	**295,778**	**244,503**	**181,183**	**160,397**	**69,078**	**45,958**	**210,620**	**77,537**	**220,967**	**111,935**	**134,088**	**121,720**	**107,705**

HAMILTON COUNTY DEPARTMENT OF EDUCATION
FEDERAL PROGRAMS
TITLE I, PART A: IMPROVING BASIC PROGRAMS
BUDGET FISCAL YEAR 2025-2026

SOURCE OF FUNDS SUMMARY

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-0000-0-00000-471410-0000-0000-101	FY26 Allocation less Contribution to Con Admin	17,013,135	11,291		17,024,426
141-2-101-0000-0-00000-471410-0000-0000-101	FY25 Carryover	2,682,676			2,682,676
	Total Source of Funds	**19,695,811**	**11,291**	**-**	**19,707,102**

USE OF FUNDS DETAIL

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-0000-0-99100-550410-0000-0000-101	Indirect Cost (3.06%)	584,796	336		585,132
	Total 99100 - Indirect Cost	**584,796**	**336**	**-**	**585,132**
Pre Kindergarten					
141-2-101-6000-6-73400-5116D0-PBEN-1130-101	Teacher Pre-K (18.48 FTE)	1,100,000			1,100,000
141-2-101-6000-6-73400-516330-PBEN-1130-101	Educational Assistant Pre-K (13.44 FTE)	400,000			400,000
141-2-101-6000-6-73400-518810-0000-1130-101	Bonus	28,880			28,880
141-2-101-6000-6-73400-5189D0-PBEN-1130-101	District Content Lead (1 FTE)	84,000			84,000
141-2-101-6000-6-73400-5189J0-PWOB-1130-101	Coordinator Part-time (.5 FTE)	45,000			45,000
141-2-101-6000-6-73400-518980-PBEN-1130-101	Student Support Coach	65,000			65,000
141-2-101-6000-6-73400-520110-0000-1130-101	Social Security	107,000			107,000
141-2-101-6000-6-73400-520410-0000-1130-101	State Retirement	155,500			155,500
141-2-101-6000-6-73400-520610-0000-1130-101	Life Insurance	1,400			1,400
141-2-101-6000-6-73400-520710-0000-1130-101	Health Insurance	452,800			452,800
141-2-101-6000-6-73400-520770-0000-1130-101	Health Insurance - Part-time	1,500			1,500
141-2-101-6000-6-73400-520810-0000-1130-101	Dental Insurance	10,000			10,000
141-2-101-6000-6-73400-521010-0000-1130-101	Unemployment Compensation	500			500
141-2-101-6000-6-73400-521210-0000-1130-101	Medicare	25,100			25,100
141-2-101-6000-6-73400-529910-0000-1130-101	Long Term Disability	3,700			3,700
141-2-101-6000-6-73400-529930-0000-1130-101	Short Term Disability	4,000			4,000
141-2-101-6000-6-73400-535510-0000-1130-101	Travel	2,700			2,700
	Total 73400 - Early Childhood Education	**2,487,080**	**-**	**-**	**2,487,080**
	Total Pre Kindergarten	**2,487,080**	**-**	**-**	**2,487,080**
Total Priority and on the Cusp School Set Aside					
141-2-101-6000-0-71100-539990-0000-1150-101	Contracted Services	25,000		(25,000)	-
	Total 71100 - Regular Instruction - MR/MT	**25,000**	**-**	**(25,000)**	**-**
141-2-101-0017-1-71100-516310-PBEN-1150-101	Educational Assistant (1 FTE)	26,626			26,626
141-2-101-0017-1-71100-518810-0000-1150-101	Bonus	2,000			2,000
141-2-101-0017-1-71100-520110-0000-1150-101	Social Security	3,742			3,742
141-2-101-0017-1-71100-520410-0000-1150-101	Retirement	2,187			2,187
141-2-101-0017-1-71100-520610-0000-1150-101	Life Insurance	40			40
141-2-101-0017-1-71100-520710-0000-1150-101	Medical Insurance	13,320			13,320
141-2-101-0017-1-71100-520810-0000-1150-101	Dental Insurance	294			294
141-2-101-0017-1-71100-521010-0000-1150-101	Unemployment Compensation	14			14
141-2-101-0017-1-71100-521210-0000-1150-101	Medicare	875			875
141-2-101-0017-1-71100-529910-0000-1150-101	Long Term Disability	107			107
141-2-101-0017-1-71100-529930-0000-1150-101	Short Term Disability	116			116
	Total 71100 - Regular Instruction -Bess T. Shepherd	**49,321**	**-**	**-**	**49,321**
141-2-101-0037-1-71100-5116H0-PBEN-1150-101	Teacher - Intervention (1 FTE)	52,858			52,858
141-2-101-0037-1-71100-516310-PBEN-1150-101	Educational Assistant (2 FTE)	54,033			54,033
141-2-101-0037-1-71100-518810-0000-1150-101	Bonus	4,000			4,000
141-2-101-0037-1-71100-520110-0000-1150-101	Social Security	6,875			6,875
141-2-101-0037-1-71100-520410-0000-1150-101	Retirement	9,191			9,191
141-2-101-0037-1-71100-520610-0000-1150-101	Life Insurance	120			120
141-2-101-0037-1-71100-520710-0000-1150-101	Medical Insurance	39,960			39,960
141-2-101-0037-1-71100-520810-0000-1150-101	Dental Insurance	882			882
141-2-101-0037-1-71100-521010-0000-1150-101	Unemployment Compensation	42			42
141-2-101-0037-1-71100-521210-0000-1150-101	Medicare	1,608			1,608
141-2-101-0037-1-71100-529910-0000-1150-101	Long Term Disability	321			321
141-2-101-0037-1-71100-529930-0000-1150-101	Short Term Disability	348			348
	Total 71100 - Regular Instruction - Donaldson Elementary	**170,238**	**-**	**-**	**170,238**
141-2-101-0041-4-71100-514090-0000-1150-101	Teacher Supplements	-	22,240		22,240
141-2-101-0041-4-71100-520110-0000-1150-101	Social Security	-	1,379		1,379
141-2-101-0041-4-71100-520410-0000-1150-101	Retirement	-	2,052		2,052
141-2-101-0041-4-71100-521210-0000-1150-101	Medicare	-	322		322
141-2-101-0041-4-71100-542910-0000-1150-101	Instructional Supplies and Materials	-	11,462		11,462
141-2-101-0041-4-71100-547110-0000-1150-101	Software	-	5,475		5,475
	Total 71100 - Regular Instruction - Normal Park	-	42,930	-	42,930

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-0048-1-71100-516310-PBEN-1150-101	Educational Assistant (1 FTE)	23,685			23,685
141-2-101-0048-1-71100-518810-0000-1150-101	Bonus	2,000			2,000
141-2-101-0048-1-71100-520110-0000-1150-101	Social Security	1,592			1,592
141-2-101-0048-1-71100-520410-0000-1150-101	Retirement	1,962			1,962
141-2-101-0048-1-71100-520610-0000-1150-101	Life Insurance	40			40
141-2-101-0048-1-71100-520710-0000-1150-101	Medical Insurance	13,320			13,320
141-2-101-0048-1-71100-520810-0000-1150-101	Dental Insurance	294			294
141-2-101-0048-1-71100-521010-0000-1150-101	Unemployment Compensation	14			14
141-2-101-0048-1-71100-521210-0000-1150-101	Medicare	372			372
141-2-101-0048-1-71100-529910-0000-1150-101	Long Term Disability	107			107
141-2-101-0048-1-71100-529930-0000-1150-101	Short Term Disability	116			116
	Total 71100 - Regular Instruction - CHES	**43,502**	**-**	**-**	**43,502**
141-2-101-0063-1-71100-516310-PBEN-1150-101	Educational Assistant (1 FTE)	23,109			23,109
141-2-101-0063-1-71100-518810-0000-1150-101	Bonus	2,000			2,000
141-2-101-0063-1-71100-520110-0000-1150-101	Social Security	1,557			1,557
141-2-101-0063-1-71100-520410-0000-1150-101	Retirement	1,918			1,918
141-2-101-0063-1-71100-520610-0000-1150-101	Life Insurance	40			40
141-2-101-0063-1-71100-520710-0000-1150-101	Medical Insurance	13,320			13,320
141-2-101-0063-1-71100-520810-0000-1150-101	Dental Insurance	294			294
141-2-101-0063-1-71100-521010-0000-1150-101	Unemployment Compensation	14			14
141-2-101-0063-1-71100-521210-0000-1150-101	Medicare	364			364
141-2-101-0063-1-71100-529910-0000-1150-101	Long Term Disability	107			107
141-2-101-0063-1-71100-529930-0000-1150-101	Short Term Disability	116			116
	Total 71100 - Regular Instruction - East Lake Elementary	**42,839**	**-**	**-**	**42,839**
141-2-101-0064-2-71100-513450-PWOB-1150-101	Other Instructional Personnel .5 FTE	-	28,250		28,250
141-2-101-0064-2-71100-520110-0000-1150-101	Social Security	-	1,752		1,752
141-2-101-0064-2-71100-520770-0000-1150-101	Medical Insurance - Part-time	-	500		500
141-2-101-0064-2-71100-521210-0000-1150-101	Medicare	-	410		410
	Total 71100 - Regular Instruction - East Lake Academy	**-**	**30,912**	**-**	**30,912**
141-2-101-0065-1-71100-516310-PBEN-1150-101	Educational Assistant (1 FTE)	26,610			26,610
141-2-101-0065-1-71100-518810-0000-1150-101	Bonus	2,000			2,000
141-2-101-0065-1-71100-520110-0000-1150-101	Social Security	1,774			1,774
141-2-101-0065-1-71100-520410-0000-1150-101	Retirement	2,186			2,186
141-2-101-0065-1-71100-520610-0000-1150-101	Life Insurance	40			40
141-2-101-0065-1-71100-520710-0000-1150-101	Medical Insurance	13,320			13,320
141-2-101-0065-1-71100-520810-0000-1150-101	Dental Insurance	294			294
141-2-101-0065-1-71100-521010-0000-1150-101	Unemployment Compensation	14			14
141-2-101-0065-1-71100-521210-0000-1150-101	Medicare	415			415
141-2-101-0065-1-71100-529910-0000-1150-101	Long Term Disability	107			107
141-2-101-0065-1-71100-529930-0000-1150-101	Short Term Disability	116			116
	Total 71100 - Regular Instruction - East Ridge Elementary	**46,876**	**-**	**-**	**46,876**
141-2-101-0075-2-71100-513450-PWOB-1150-101	Tutor Part-time .5 FTE	-	42,300		42,300
141-2-101-0075-2-71100-520110-0000-1150-101	Social Security	-	2,623		2,623
141-2-101-0075-2-71100-520770-0000-1150-101	Medical Insurance - Part-time	-	750		750
141-2-101-0075-2-71100-521210-0000-1150-101	Medicare	-	613		613
	Total 71100 - Regular Instruction - East Ridge MS	**-**	**46,286**	**-**	**46,286**
141-2-101-0078-1-71100-516310-PBEN-1150-101	Educational Assistant (1 FTE)	30,777			30,777
141-2-101-0078-1-71100-518810-0000-1150-101	Bonus	2,000			2,000
141-2-101-0078-1-71100-520110-0000-1150-101	Social Security	2,032			2,032
141-2-101-0078-1-71100-520410-0000-1150-101	Retirement	2,504			2,504
141-2-101-0078-1-71100-520610-0000-1150-101	Life Insurance	40			40
141-2-101-0078-1-71100-520710-0000-1150-101	Medical Insurance	13,320			13,320
141-2-101-0078-1-71100-520810-0000-1150-101	Dental Insurance	294			294
141-2-101-0078-1-71100-521010-0000-1150-101	Unemployment Compensation	14			14
141-2-101-0078-1-71100-521210-0000-1150-101	Medicare	475			475
141-2-101-0078-1-71100-529910-0000-1150-101	Long Term Disability	107			107
141-2-101-0078-1-71100-529930-0000-1150-101	Short Term Disability	116			116
	Total 71100 - Regular Instruction - East Side Elementary	**51,679**	**-**	**-**	**51,679**
141-2-101-0090-1-71100-516310-PBEN-1150-101	Educational Assistant (1 FTE)	25,730			25,730
141-2-101-0090-1-71100-518810-0000-1150-101	Bonus	2,000			2,000
141-2-101-0090-1-71100-520110-0000-1150-101	Social Security	1,719			1,719
141-2-101-0090-1-71100-520410-0000-1150-101	Retirement	2,119			2,119
141-2-101-0090-1-71100-520610-0000-1150-101	Life Insurance	40			40
141-2-101-0090-1-71100-520710-0000-1150-101	Medical Insurance	13,320			13,320
141-2-101-0090-1-71100-520810-0000-1150-101	Dental Insurance	294			294
141-2-101-0090-1-71100-521010-0000-1150-101	Unemployment Compensation	14			14
141-2-101-0090-1-71100-521210-0000-1150-101	Medicare	402			402
141-2-101-0090-1-71100-529910-0000-1150-101	Long Term Disability	107			107
141-2-101-0090-1-71100-529930-0000-1150-101	Short Term Disability	116			116
	Total 71100 - Regular Instruction - Harrison Elementary	**45,861**	**-**	**-**	**45,861**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-0097-1-71100-516310-PBEN-1150-101	Educational Assistant (1 FTE)	25,430			25,430
141-2-101-0097-1-71100-518810-0000-1150-101	Bonus	2,000			2,000
141-2-101-0097-1-71100-520110-0000-1150-101	Social Security	1,701			1,701
141-2-101-0097-1-71100-520410-0000-1150-101	Retirement	2,096			2,096
141-2-101-0097-1-71100-520610-0000-1150-101	Life Insurance	40			40
141-2-101-0097-1-71100-520710-0000-1150-101	Medical Insurance	13,320			13,320
141-2-101-0097-1-71100-520810-0000-1150-101	Dental Insurance	294			294
141-2-101-0097-1-71100-521010-0000-1150-101	Unemployment Compensation	14			14
141-2-101-0097-1-71100-521210-0000-1150-101	Medicare	398			398
141-2-101-0097-1-71100-529910-0000-1150-101	Long Term Disability	107			107
141-2-101-0097-1-71100-529930-0000-1150-101	Short Term Disability	116			116
	Total 71100 - Regular Instruction - Barger Academy	**45,516**	**-**	**-**	**45,516**
141-2-101-0110-1-71100-516310-PBEN-1150-101	Educational Assistant (1 FTE)	23,109			23,109
141-2-101-0110-1-71100-518810-0000-1150-101	Bonus	2,000			2,000
141-2-101-0110-1-71100-520110-0000-1150-101	Social Security	1,557			1,557
141-2-101-0110-1-71100-520410-0000-1150-101	Retirement	1,918			1,918
141-2-101-0110-1-71100-520610-0000-1150-101	Life Insurance	40			40
141-2-101-0110-1-71100-520710-0000-1150-101	Medical Insurance	13,320			13,320
141-2-101-0110-1-71100-520810-0000-1150-101	Dental Insurance	294			294
141-2-101-0110-1-71100-521010-0000-1150-101	Unemployment Compensation	14			14
141-2-101-0110-1-71100-521210-0000-1150-101	Medicare	364			364
141-2-101-0110-1-71100-529910-0000-1150-101	Long Term Disability	107			107
141-2-101-0110-1-71100-529930-0000-1150-101	Short Term Disability	116			116
	Total 71100 - Regular Instruction - Hardy Elementary	**42,839**	**-**	**-**	**42,839**
141-2-101-0155-1-71100-514090-0000-1150-101	Teacher Supplements	-	17,280		17,280
141-2-101-0155-1-71100-520110-0000-1150-101	Social Security	-	1,071		1,071
141-2-101-0155-1-71100-520410-0000-1150-101	Retirement	-	1,555		1,555
141-2-101-0155-1-71100-521210-0000-1150-101	Medicare	-	251		251
141-2-101-0155-1-71100-539980-0000-1150-101	Contract Substitutes	-	16,800		16,800
141-2-101-0155-1-71100-542910-0000-1150-101	Instructional Supplies	-	4,500		4,500
	Total 71100 - Regular Instruction - Ooltewah Elementary	**-**	**41,457**	**-**	**41,457**
141-2-101-0157-2-71100-513450-PWOB-1150-101	Tutor - Part-time (.5 FTE)	-	31,860		31,860
141-2-101-0157-2-71100-514090-0000-1150-101	Teacher Supplements	-	11,520		11,520
141-2-101-0157-2-71100-520110-0000-1150-101	Social Security	-	2,690		2,690
141-2-101-0157-2-71100-520410-0000-1150-101	Retirement	-	1,037		1,037
141-2-101-0157-2-71100-520770-0000-1150-101	Medical Insurance - Part-time	-	750		750
141-2-101-0157-2-71100-521210-0000-1150-101	Medicare	-	629		629
141-2-101-0157-2-71100-539980-0000-1150-101	Contract Substitutes	-	4,000		4,000
141-2-101-0157-2-71100-549990-0000-1150-101	Other Supplies and Materials	-	20,000		20,000
	Total 71100 - Regular Instruction - Ooltewah MS	-	72,486	-	72,486
141-2-101-0180-2-71100-539980-0000-1150-101	Contract Substitutes	-	2,000		2,000
	Total 71100 - Regular Instruction - Red Bank MS	**-**	**2,000**	**-**	**2,000**
141-2-101-0183-1-71100-513450-PWOB-1150-101	Tutor Part-time (.5 FTE)	-	28,700		28,700
141-2-101-0183-1-71100-514090-0000-1150-101	Teacher Supplements	-	12,960		12,960
141-2-101-0183-1-71100-520110-0000-1150-101	Social Security	-	2,583		2,583
141-2-101-0183-1-71100-520410-0000-1150-101	Retirement	-	1,166		1,166
141-2-101-0183-1-71100-520770-0000-1150-101	Medical Insurance - Part-time	-	650		650
141-2-101-0183-1-71100-521210-0000-1150-101	Medicare	-	604		604
141-2-101-0183-1-71100-539980-0000-1150-101	Contract Substitutes	-	1,200		1,200
	Total 71100 - Regular Instruction - Rivermont Elementary	**-**	**47,863**	**-**	**47,863**
141-2-101-0194-1-71100-516310-PBEN-1150-101	Educational Assistant (1 FTE)	28,162			28,162
141-2-101-0194-1-71100-518810-0000-1150-101	Bonus	2,000			2,000
141-2-101-0194-1-71100-520110-0000-1150-101	Social Security	1,870			1,870
141-2-101-0194-1-71100-520410-0000-1150-101	Retirement	2,304			2,304
141-2-101-0194-1-71100-520610-0000-1150-101	Life Insurance	40			40
141-2-101-0194-1-71100-520710-0000-1150-101	Medical Insurance	13,320			13,320
141-2-101-0194-1-71100-520810-0000-1150-101	Dental Insurance	294			294
141-2-101-0194-1-71100-521010-0000-1150-101	Unemployment Compensation	14			14
141-2-101-0194-1-71100-521210-0000-1150-101	Medicare	437			437
141-2-101-0194-1-71100-529910-0000-1150-101	Long Term Disability	107			107
141-2-101-0194-1-71100-529930-0000-1150-101	Short Term Disability	116			116
	Total 71100 - Regular Instruction - Orchard Knob ES	**48,664**	**-**	**-**	**48,664**
141-2-101-0235-1-71100-516310-PBEN-1150-101	Educational Assistant (1 FTE)	24,276			24,276
141-2-101-0235-1-71100-518810-0000-1150-101	Bonus	2,000			2,000
141-2-101-0235-1-71100-520110-0000-1150-101	Social Security	1,629			1,629
141-2-101-0235-1-71100-520410-0000-1150-101	Retirement	2,007			2,007
141-2-101-0235-1-71100-520610-0000-1150-101	Life Insurance	40			40
141-2-101-0235-1-71100-520710-0000-1150-101	Medical Insurance	13,320			13,320
141-2-101-0235-1-71100-520810-0000-1150-101	Dental Insurance	294			294
141-2-101-0235-1-71100-521010-0000-1150-101	Unemployment Compensation	14			14
141-2-101-0235-1-71100-521210-0000-1150-101	Medicare	381			381
141-2-101-0235-1-71100-529910-0000-1150-101	Long Term Disability	107			107
141-2-101-0235-1-71100-529930-0000-1150-101	Short Term Disability	116			116
	Total 71100 - Regular Instruction - Spring Creek Elementary	**44,184**	**-**	**-**	**44,184**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-0245-1-71100-513450-PWOB-1150-101	Tutor Part time (.5 FTE)	20,115			20,115
141-2-101-0245-1-71100-514090-0000-1150-101	Teacher Supplements	-	51,840		51,840
141-2-101-0245-1-71100-516310-PBEN-1150-101	Educational Assistant (1 FTE)	26,020			26,020
141-2-101-0245-1-71100-518810-0000-1150-101	Bonus	2,000			2,000
141-2-101-0245-1-71100-520110-0000-1150-101	Social Security	2,984	3,214		6,198
141-2-101-0245-1-71100-520410-0000-1150-101	Retirement	2,141	4,666		6,807
141-2-101-0245-1-71100-520610-0000-1150-101	Life Insurance	40			40
141-2-101-0245-1-71100-520710-0000-1150-101	Medical Insurance	13,320			13,320
141-2-101-0245-1-71100-520770-0000-1150-101	Medical Insurance - PT	450	685		1,135
141-2-101-0245-1-71100-520810-0000-1150-101	Dental Insurance	294			294
141-2-101-0245-1-71100-521010-0000-1150-101	Unemployment Compensation	14			14
141-2-101-0245-1-71100-521210-0000-1150-101	Medicare	698	752		1,450
141-2-101-0245-1-71100-529910-0000-1150-101	Long Term Disability	107			107
141-2-101-0245-1-71100-529930-0000-1150-101	Short Term Disability	116			116
141-2-101-0245-1-71100-549990-0000-1150-101	Other Supplies and Materials	-	20,000		20,000
	Total 71100 - Regular Instruction - Woodmore ES	**68,299**	**81,157**	**-**	**149,456**
141-2-101-0275-4-71100-5116G0-PBEN-1150-101	Teacher RTI (.5 FTE)	27,062			27,062
141-2-101-0275-4-71100-520110-0000-1150-101	Social Security	1,678			1,678
141-4-101-0275-4-71100-520410-0000-1150-101	Retirement	2,436			2,436
141-4-101-0275-4-71100-520610-0000-1150-101	Life Insurance	20			20
141-4-101-0275-4-71100-520710-0000-1150-101	Medical Insurance	6,660			6,660
141-4-101-0275-4-71100-520810-0000-1150-101	Dental Insurance	147			147
141-4-101-0275-4-71100-521010-0000-1150-101	Unemployment Compensation	7			7
141-2-101-0275-4-71100-521210-0000-1150-101	Medicare	392			392
141-2-101-0275-4-71100-529910-0000-1150-101	Long Term Disability	54			54
141-2-101-0275-4-71100-529930-0000-1150-101	Short Term Disability	58			58
	Total 71100 - Regular Instruction - HCVS	**38,514**	**-**	**-**	**38,514**
141-2-101-0033-1-72130-518810-0000-1150-101	Bonus	2,000			2,000
141-2-101-0033-1-72130-518970-PBEN-1150-101	Family Partnership Specialist (1 FTE)	44,125			44,125
141-2-101-0033-1-72130-520110-0000-1150-101	Social Security	2,860			2,860
141-2-101-0033-1-72130-520410-0000-1150-101	Retirement	6,780			6,780
141-2-101-0033-1-72130-520610-0000-1150-101	Life Insurance	40			40
141-2-101-0033-1-72130-520710-0000-1150-101	Medical Insurance	13,320			13,320
141-2-101-0033-1-72130-520810-0000-1150-101	Dental Insurance	294			294
141-2-101-0033-1-72130-521010-0000-1150-101	Unemployment Compensation	14			14
141-2-101-0033-1-72130-521210-0000-1150-101	Medicare	669			669
141-2-101-0033-1-72130-529910-0000-1150-101	Long Term Disability	107			107
141-2-101-0033-1-72130-529930-0000-1150-101	Short Term Disability	116			116
141-2-101-0033-1-72130-539990-0000-1150-101	Contract Services	64,000		(50,000)	14,000
	Total 72130 - Other Student Support - Brown Academy	**134,325**	**-**	**(50,000)**	**84,325**
141-1-101-0155-1-72130-513010-0000-1150-101	Social Worker	-	1,520		1,520
141-1-101-0155-1-72130-518980-0000-1150-101	Student Support Coach	-	1,520		1,520
141-1-101-0155-1-72130-520110-0000-1150-101	Social Security	-	188		188
141-1-101-0155-1-72130-520410-0000-1150-101	Retirement	-	243		243
141-1-101-0155-1-72130-521210-0000-1150-101	Medicare	-	44		44
	Total 72130 - Other Student Support - Ooltewah Elementary	**-**	**3,515**	**-**	**3,515**
141-2-101-0157-2-72130-513010-0000-1150-101	Social Worker	-	2,160		2,160
141-2-101-0157-2-72130-520110-0000-1150-101	Social Security	-	134		134
141-2-101-0157-2-72130-520410-0000-1150-101	Retirement	-	174		174
141-2-101-0157-2-72130-521210-0000-1150-101	Medicare	-	31		31
	Total 72130 - Other Student Support - Ooltewah Middle	**-**	**2,499**	**-**	**2,499**
141-1-101-0183-1-72130-512310-0000-1150-101	Counselor	-	2,880		2,880
141-1-101-0183-1-72130-520110-0000-1150-101	Social Security	-	179		179
141-1-101-0183-1-72130-520410-0000-1150-101	Retirement	-	259		259
141-1-101-0183-1-72130-521210-0000-1150-101	Medicare	-	42		42
	Total 72130 - Other Student Support - Rivermont Elementary	**-**	**3,360**	**-**	**3,360**
141-2-101-0245-1-72130-5189B0-0000-1150-101	Truancy Specialist	-	4,196		4,196
141-2-101-0245-1-72130-520110-0000-1150-101	Social Security	-	260		260
141-2-101-0245-1-72130-520410-0000-1150-101	Retirement	-	321		321
141-2-101-0245-1-72130-521210-0000-1150-101	Medicare	-	61		61
	Total 72130 - Other Student Support - Woodmore Elementary	**-**	**4,838**	**-**	**4,838**
141-2-101-6000-0-72130-518810-0000-1150-101	Bonus	2,000			2,000
141-2-101-6000-0-72130-5189B0-PBEN-1150-101	Truancy Specialist (1 FTE)	55,461			55,461
141-2-101-6000-0-72130-520110-0000-1150-101	Social Security	3,564			3,564
141-2-101-6000-0-72130-520410-0000-1150-101	Retirement	8,311			8,311
141-2-101-6000-0-72130-520610-0000-1150-101	Life Insurance	40			40
141-2-101-6000-0-72130-520710-0000-1150-101	Medical Insurance	13,320			13,320
141-2-101-6000-0-72130-520810-0000-1150-101	Dental Insurance	294			294
141-2-101-6000-0-72130-521010-0000-1150-101	Unemployment Compensation	14			14
141-2-101-6000-0-72130-521210-0000-1150-101	Medicare	833			833
141-2-101-6000-0-72130-529910-0000-1150-101	Long Term Disability	107			107
141-2-101-6000-0-72130-529930-0000-1150-101	Short Term Disability	116			116
141-2-101-6000-0-72130-535510-0000-1150-101	Travel: Mileage	2,000			2,000
141-2-101-6000-0-72130-539990-0000-1150-101	Contracted Services	120,000			120,000
	Total 72130 - Other Student Support - District	**206,060**	**-**	**-**	**206,060**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-6002-0-72130-512310-PBEN-1150-101	Counselor (.5 FTE)	42,623			42,623
141-2-101-6002-0-72130-518810-0000-1150-101	Bonus	2,000			2,000
141-2-101-6002-0-72130-518980-PBEN-1150-101	MT Student Support Coach (.5 FTE)	24,038			24,038
141-2-101-6002-0-72130-518980-0000-1150-101	MT Student Support Coach - additional days	3,588			3,588
141-2-101-6002-0-72130-520110-0000-1150-101	Social Security	4,376			4,376
141-2-101-6002-0-72130-520410-0000-1150-101	Retirement	10,376			10,376
141-2-101-6002-0-72130-520610-0000-1150-101	Life Insurance	40			40
141-2-101-6002-0-72130-520710-0000-1150-101	Medical Insurance	13,320			13,320
141-2-101-6002-0-72130-520810-0000-1150-101	Dental Insurance	294			294
141-2-101-6002-0-72130-521010-0000-1150-101	Unemployment Compensation	14			14
141-2-101-6002-0-72130-521210-0000-1150-101	Medicare	1,023			1,023
141-2-101-6002-0-72130-529910-0000-1150-101	Long Term Disability	107			107
141-2-101-6002-0-72130-529930-0000-1150-101	Short Term Disability	116			116
141-2-101-6002-0-72130-535510-0000-1150-101	Mileage	3,000			3,000
	Total 72130 - Other Student Support - MidTown LC	**104,915**	**-**	**-**	**104,915**
141-2-101-0000-0-72210-510530-PBEN-1150-101	Coordinator (1 FTE)	104,850			104,850
141-2-101-0000-0-72210-511910-PBEN-1150-101	Accountant (.25 FTE)	18,385			18,385
141-2-101-0000-0-72210-518810-0000-1150-101	Bonus	2,500			2,500
141-2-101-0000-0-72210-520110-0000-1150-101	Social Security	7,796			7,796
141-2-101-0000-0-72210-520410-0000-1150-101	Retirement	12,394			12,394
141-2-101-0000-0-72210-520610-0000-1150-101	Life Insurance	50			50
141-2-101-0000-0-72210-520710-0000-1150-101	Medical Insurance	16,650			16,650
141-2-101-0000-0-72210-520810-0000-1150-101	Dental Insurance	368			368
141-2-101-0000-0-72210-521010-0000-1150-101	Unemployment Compensation	18			18
141-2-101-0000-0-72210-521210-0000-1150-101	Medicare	1,823			1,823
141-2-101-0000-0-72210-529910-0000-1150-101	Long Term Disability	134			134
141-2-101-0000-0-72210-529930-0000-1150-101	Short Term Disability	145			145
141-2-101-0000-0-72210-535510-0000-1150-101	Travel	3,227			3,227
141-2-101-6000-0-72210-539990-0000-1150-101	Contracted Services	-	175,000		175,000
	Total 72210 - Regular Instruction Support - District	**168,340**	**175,000**	**-**	**343,340**
141-2-101-6002-0-72210-517210-PBEN-1150-101	Instructional Coach - New Teacher Coach (.5 FTE)	41,407			41,407
141-2-101-6002-0-72210-518810-0000-1150-101	Bonus	6,500			6,500
141-2-101-6002-0-72210-5189D0-PBEN-1150-101	District K-5 Math Lead MT (.5 FTE)	37,038			37,038
141-2-101-6002-0-72210-5189D0-PBEN-1150-101	District 6-12 Math Lead MT (.5 FTE)	41,407			41,407
141-2-101-6002-0-72210-5189D0-PBEN-1150-101	District K-5 ELA Lead MT (.5 FTE)	47,862			47,862
141-2-101-6002-0-72210-5189D0-PBEN-1150-101	District 3-5 ELA Lead MT (1 FTE)	80,873			80,873
141-2-101-6002-0-72210-5189D0-PBEN-1150-101	District 6-12 ELA Lead MT (.25 FTE)	16,941			16,941
141-2-101-6002-0-72210-5189D0-0000-1150-101	District Content Lead Supplemental Pay	5,882			5,882
141-2-101-6002-0-72210-520110-0000-1150-101	Social Security	17,230			17,230
141-2-101-6002-0-72210-520410-0000-1150-101	Retirement	25,380			25,380
141-2-101-6002-0-72210-520610-0000-1150-101	Life Insurance	130			130
141-2-101-6002-0-72210-520710-0000-1150-101	Medical Insurance	43,290			43,290
141-2-101-6002-0-72210-520810-0000-1150-101	Dental Insurance	955			955
141-2-101-6002-0-72210-521010-0000-1150-101	Unemployment Compensation	45			45
141-2-101-6002-0-72210-521210-0000-1150-101	Medicare	4,030			4,030
141-2-101-6002-0-72210-529910-0000-1150-101	Long Term Disability	348			348
141-2-101-6002-0-72210-529930-0000-1150-101	Short Term Disability	377			377
141-2-101-6002-0-72210-535510-0000-1150-101	Travel	3,500			3,500
	Total 72210 - Regular Instruction Support - Midtown	**373,195**	**-**	**-**	**373,195**
141-2-101-6003-0-72210-514100-0000-1150-101	Differentiated Compensation - MR Math Content Leads	30,700			30,700
141-2-101-6003-0-72210-517210-PBEN-1150-101	District New Teacher Coach MR (1 FTE)	83,302			83,302
141-2-101-6003-0-72210-518810-0000-1150-101	Bonus	11,000			11,000
141-2-101-6003-0-72210-5189D0-PBEN-1150-101	District K-5 Math Lead MR (1 FTE)	75,532			75,532
141-2-101-6003-0-72210-5189D0-PBEN-1150-101	District 6-12 Math Content Lead MR (1 FTE)	77,961			77,961
141-2-101-6003-0-72210-5189D0-PBEN-1150-101	District 6-12 Math Content Lead MR (.5 FTE)	33,884			33,884
141-2-101-6003-0-72210-5189D0-PBEN-1150-101	District Content Lead 3-5 ELA MR (1 FTE)	79,417			79,417
141-2-101-6003-0-72210-5189D0-PBEN-1150-101	District ELA K-2 Lead (1 FTE)	83,790			83,790
141-2-101-6003-0-72210-5189D0-0000-1150-101	District Content Lead Supplemental Pay	15,177			15,177
141-2-101-6003-0-72210-520110-0000-1150-101	Social Security	30,428			30,428
141-2-101-6003-0-72210-520410-0000-1150-101	Retirement	43,802			43,802
141-2-101-6003-0-72210-520610-0000-1150-101	Life Insurance	220			220
141-2-101-6003-0-72210-520710-0000-1150-101	Medical Insurance	73,260			73,260
141-2-101-6003-0-72210-520810-0000-1150-101	Dental Insurance	1,618			1,618
141-2-101-6003-0-72210-521010-0000-1150-101	Unemployment Compensation	78			78
141-2-101-6003-0-72210-521210-0000-1150-101	Medicare	7,116			7,116
141-2-101-6003-0-72210-529910-0000-1150-101	Long Term Disability	589			589
141-2-101-6003-0-72210-529930-0000-1150-101	Short Term Disability	638			638
141-2-101-6003-0-72210-535510-0000-1150-101	Travel	4,000			4,000
	Total 72210 - Regular Instruction Support - Missionary Ridge	**652,512**	**-**	**-**	**652,512**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-0037-1-72210-517210-PBEN-1150-101	Instructional Coach (1 FTE)	71,361			71,361
141-2-101-0037-1-72210-518810-0000-1150-101	Bonus	2,000			2,000
141-2-101-0037-1-72210-520110-0000-1150-101	Social Security	4,549			4,549
141-2-101-0037-1-72210-520410-0000-1150-101	Retirement	6,603			6,603
141-2-101-0037-1-72210-520610-0000-1150-101	Life Insurance	40			40
141-2-101-0037-1-72210-520710-0000-1150-101	Medical Insurance	13,320			13,320
141-2-101-0037-1-72210-520810-0000-1150-101	Dental Insurance	294			294
141-2-101-0037-1-72210-521010-0000-1150-101	Unemployment Compensation	14			14
141-2-101-0037-1-72210-521210-0000-1150-101	Medicare	1,064			1,064
141-2-101-0037-1-72210-529910-0000-1150-101	Long Term Disability	107			107
141-2-101-0037-1-72210-529930-0000-1150-101	Short Term Disability	116			116
	Total 72210 - Regular Instruction Support - DES	**99,468**	**-**	**-**	**99,468**
141-2-101-0041-4-72210-519610-0000-1150-101	Stipends	-	5,000		5,000
141-2-101-0041-4-72210-520110-0000-1150-101	Social Security	-	310		310
141-2-101-0041-4-72210-520410-0000-1150-101	Retirement	-	450		450
141-2-101-0041-4-72210-521210-0000-1150-101	Medicare	-	73		73
	Total 72210 - Regular Instruction Support - Normal Park	**-**	**5,833**	**-**	**5,833**
141-2-101-0048-1-72210-517210-PBEN-1150-101	Instructional Coach (.5 FTE)	30,360			30,360
141-2-101-0048-1-72210-518810-0000-1150-101	Bonus	1,000			1,000
141-2-101-0048-1-72210-520110-0000-1150-101	Social Security	1,945			1,945
141-2-101-0048-1-72210-520410-0000-1150-101	Retirement	2,822			2,822
141-2-101-0048-1-72210-520610-0000-1150-101	Life Insurance	20			20
141-2-101-0048-1-72210-520710-0000-1150-101	Medical Insurance	6,660			6,660
141-2-101-0048-1-72210-520810-0000-1150-101	Dental Insurance	147			147
141-2-101-0048-1-72210-521010-0000-1150-101	Unemployment Compensation	7			7
141-2-101-0048-1-72210-521210-0000-1150-101	Medicare	455			455
141-2-101-0048-1-72210-529910-0000-1150-101	Long Term Disability	54			54
141-2-101-0048-1-72210-529930-0000-1150-101	Short Term Disability	58			58
	Total 72210 - Regular Instruction Support - CHES	**43,528**	**-**	**-**	**43,528**
141-2-101-0110-1-72210-517210-PBEN-1150-101	Instructional Coach (1 FTE)	66,485			66,485
141-2-101-0110-1-72210-518810-0000-1150-101	Bonus	2,000			2,000
141-2-101-0110-1-72210-520110-0000-1150-101	Social Security	4,246			4,246
141-2-101-0110-1-72210-520410-0000-1150-101	Retirement	6,163			6,163
141-2-101-0110-1-72210-520610-0000-1150-101	Life Insurance	40			40
141-2-101-0110-1-72210-520710-0000-1150-101	Medical Insurance	13,320			13,320
141-2-101-0110-1-72210-520810-0000-1150-101	Dental Insurance	294			294
141-2-101-0110-1-72210-521010-0000-1150-101	Unemployment Compensation	14			14
141-2-101-0110-1-72210-521210-0000-1150-101	Medicare	993			993
141-2-101-0110-1-72210-529910-0000-1150-101	Long Term Disability	107			107
141-2-101-0110-1-72210-529930-0000-1150-101	Short Term Disability	116			116
	Total 72210 - Regular Instruction Support - HES	**93,778**	**-**	**-**	**93,778**
141-2-101-0157-2-72210-519610-0000-1150-101	Stipends	-	1,000		1,000
141-2-101-0157-2-72210-520110-0000-1150-101	Social Security	-	62		62
141-2-101-0157-2-72210-520410-0000-1150-101	Retirement	-	90		90
141-2-101-0157-2-72210-521210-0000-1150-101	Medicare	-	15		15
141-2-101-0157-2-72210-552410-0000-1150-101	Staff Development	-	15,000		15,000
	Total 72210 - Regular Instruction Support - Ooltewah MS	**-**	**16,167**	**-**	**16,167**
141-2-101-0180-2-72210-519610-0000-1150-101	Stipends	-	6,375		6,375
141-2-101-0180-2-72210-520110-0000-1150-101	Social Security	-	395		395
141-2-101-0180-2-72210-520410-0000-1150-101	Retirement	-	574		574
141-2-101-0180-2-72210-521210-0000-1150-101	Medicare	-	92		92
	Total 72210 - Regular Instruction Support - Red Bank MS	**-**	**7,436**	**-**	**7,436**
141-2-101-0194-1-72210-517210-PBEN-1150-101	Instructional Coach (1 FTE)	80,229			80,229
141-2-101-0194-1-72210-518810-0000-1150-101	Bonus	2,000			2,000
141-2-101-0194-1-72210-520110-0000-1150-101	Social Security	5,098			5,098
141-2-101-0194-1-72210-520410-0000-1150-101	Retirement	7,401			7,401
141-2-101-0194-1-72210-520610-0000-1150-101	Life Insurance	40			40
141-2-101-0194-1-72210-520710-0000-1150-101	Medical Insurance	13,320			13,320
141-2-101-0194-1-72210-520810-0000-1150-101	Dental Insurance	294			294
141-2-101-0194-1-72210-521010-0000-1150-101	Unemployment Compensation	14			14
141-2-101-0194-1-72210-521210-0000-1150-101	Medicare	1,192			1,192
141-2-101-0194-1-72210-529910-0000-1150-101	Long Term Disability	107			107
141-2-101-0194-1-72210-529930-0000-1150-101	Short Term Disability	116			116
	Total 72210 - Regular Instruction Support - OKES	**109,811**	**-**	**-**	**109,811**
141-2-101-0200-2-72210-517210-PBEN-1150-101	Instructional Coach (1 FTE)	67,371			67,371
141-2-101-0200-2-72210-518810-0000-1150-101	Bonus	2,000			2,000
141-2-101-0200-2-72210-520110-0000-1150-101	Social Security	4,301			4,301
141-2-101-0200-2-72210-520410-0000-1150-101	Retirement	6,243			6,243
141-2-101-0200-2-72210-520610-0000-1150-101	Life Insurance	40			40
141-2-101-0200-2-72210-520710-0000-1150-101	Medical Insurance	13,320			13,320
141-2-101-0200-2-72210-520810-0000-1150-101	Dental Insurance	294			294
141-2-101-0200-2-72210-521010-0000-1150-101	Unemployment Compensation	14			14
141-2-101-0200-2-72210-521210-0000-1150-101	Medicare	482			482
141-2-101-0200-2-72210-529910-0000-1150-101	Long Term Disability	107			107
141-2-101-0200-2-72210-529930-0000-1150-101	Short Term Disability	116			116
	Total 72210 - Regular Instruction Support - OKMS	**94,288**	**-**	**-**	**94,288**
141-2-101-0245-1-72210-517210-PBEN-1150-101	Instructional Coach (.5 FTE)	34,351			34,351

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-0245-1-72210-518810-0000-1150-101	Bonus	1,000			1,000
141-2-101-0245-1-72210-519610-0000-1150-101	Stipends	-	9,000		9,000
141-2-101-0245-1-72210-520110-0000-1150-101	Social Security	2,191	558		2,749
141-2-101-0245-1-72210-520410-0000-1150-101	Retirement	3,182	810		3,992
141-2-101-0245-1-72210-520610-0000-1150-101	Life Insurance	20			20
141-2-101-0245-1-72210-520710-0000-1150-101	Medical Insurance	6,660			6,660
141-2-101-0245-1-72210-520810-0000-1150-101	Dental Insurance	147			147
141-2-101-0245-1-72210-521010-0000-1150-101	Unemployment Compensation	7			7
141-2-101-0245-1-72210-521210-0000-1150-101	Medicare	513	131		644
141-2-101-0245-1-72210-529910-0000-1150-101	Long Term Disability	54			54
141-2-101-0245-1-72210-529930-0000-1150-101	Short Term Disability	58			58
141-2-101-0245-1-72210-552410-0000-1150-101	Staff Development	-	15,000		15,000
	Total 72210 - Regular Instruction Support - Woodmore Elemen	**48,183**	**25,499**	**-**	**73,682**
141-2-101-0000-0-72520-510530-PBEN-1150-101	Coordinator .5 FTE	41,797			41,797
141-2-101-0000-0-72520-518810-0000-1150-101	Bonus	1,000			1,000
141-2-101-0000-0-72520-520110-0000-1150-101	Social Security	2,653			2,653
141-2-101-0000-0-72520-520410-0000-1150-101	Retirement	3,270			3,270
141-2-101-0000-0-72520-520610-0000-1150-101	Life Insurance	20			20
141-2-101-0000-0-72520-520710-0000-1150-101	Medical Insurance	6,660			6,660
141-2-101-0000-0-72520-520810-0000-1150-101	Dental Insurance	147			147
141-2-101-0000-0-72520-521010-0000-1150-101	Unemployment Compensation	7			7
141-2-101-0000-0-72520-521210-0000-1150-101	Medicare	902			902
141-2-101-0000-0-72520-529910-0000-1150-101	Long Term Disability	54			54
141-2-101-0000-0-72520-529930-0000-1150-101	Short Term Disability	58			58
141-2-101-6000-0-72520-539990-0000-1150-101	Other Contracted Services	225,000			225,000
	Total 72520 - Human Resources/Personnel	**281,568**	**-**	**-**	**281,568**
141-2-101-0155-1-72710-531410-0000-1150-101	Contract with Public Carrier	-	12,600		12,600
141-2-101-0183-1-72710-531410-0000-1150-101	Contract with Public Carrier	-	12,600		12,600
141-2-101-0245-1-72710-531410-0000-1150-101	Contract with Public Carrier	-	18,900		18,900
141-2-101-0157-2-72710-531410-0000-1150-101	Contract with Public Carrier	-	18,900		18,900
141-2-101-8011-8-72710-531410-0000-1150-101	Contract with Public Carrier	-	57,000		57,000
	Total 72710 - Transportation	**-**	**120,000**	**-**	**120,000**
	Total Priority and on the Cusp School Set Aside	**3,173,303**	**729,238**	**(75,000)**	**3,827,541**
Homeless Set Aside					
141-2-101-6000-0-72130-539990-0000-1110-101	Contracted Services	113,230			113,230
	Total 72130 - Other Student Support	**113,230**	**-**	**-**	**113,230**
141-2-101-0000-0-72210-518810-0000-1110-101	Bonus	2,000			2,000
141-2-101-0000-0-72210-5189A0-PBEN-1110-101	Salary-Homeless Liaison (1 FTE)	60,671			60,671
141-2-101-0000-0-72210-520110-0000-1110-101	Social Security	3,566			3,566
141-2-101-0000-0-72210-520410-0000-1110-101	Retirement	4,686			4,686
141-2-101-0000-0-72210-520610-0000-1110-101	Life Insurance	37			37
141-2-101-0000-0-72210-520710-0000-1110-101	Health Insurance	12,295			12,295
141-2-101-0000-0-72210-520810-0000-1110-101	Dental Insurance	271			271
141-2-101-0000-0-72210-521010-0000-1110-101	Unemployment Compensation	14			14
141-2-101-0000-0-72210-521210-0000-1110-101	Medicare	890			890
141-2-101-0000-0-72210-529910-0000-1110-101	Long Term Disability	99			99
141-2-101-0000-0-72210-529930-0000-1110-101	Short Term Disability	107			107
141-2-101-0000-0-72210-535510-0000-1110-101	Mileage	2,000			2,000
	Total 72210 - Regular Instruction Support	**86,636**	**-**	**-**	**86,636**
141-2-101-0000-0-72710-518810-0000-1110-101	Bonus	2,000			2,000
141-2-101-0000-0-72710-5189A0-PBEN-1110-101	Route Dispatcher (1 FTE)	52,223			52,223
141-2-101-0000-0-72710-520110-0000-1110-101	Social Security	3,362			3,362
141-2-101-0000-0-72710-520410-0000-1110-101	Retirement	4,142			4,142
141-2-101-0000-0-72710-520610-0000-1110-101	Life Insurance	40			40
141-2-101-0000-0-72710-520710-0000-1110-101	Health Insurance	13,320			13,320
141-2-101-0000-0-72710-520810-0000-1110-101	Dental Insurance	294			294
141-2-101-0000-0-72710-521010-0000-1110-101	Unemployment Compensation	14			14
141-2-101-0000-0-72710-521210-0000-1110-101	Medicare	787			787
141-2-101-0000-0-72710-529910-0000-1110-101	Long Term Disability	107			107
141-2-101-0000-0-72710-529930-0000-1110-101	Short Term Disability	116			116
	Total 72710 - Transportation	**76,405**	**-**	**-**	**76,405**
	Total Homeless Set Aside	**276,271**	**-**	**-**	**276,271**
Diploma Completion (Graduation Success Program) - Set Aside					
141-2-101-7524-7-71100-511610-PBEN-1120-101	Teacher - Diploma Completion (1 FTE)	76,336			76,336
141-2-101-7524-7-71100-518810-0000-1120-101	Bonus	2,000			2,000
141-2-101-7524-7-71100-520110-0000-1120-101	Social Security	4,857			4,857
141-2-101-7524-7-71100-520410-0000-1120-101	State Retirement	7,050			7,050
141-2-101-7524-7-71100-520610-0000-1120-101	Life Insurance	40			40
141-2-101-7524-7-71100-520710-0000-1120-101	Health Insurance	13,320			13,320
141-2-101-7524-7-71100-520810-0000-1120-101	Dental Insurance	294			294
141-2-101-7524-7-71100-521010-0000-1120-101	Unemployment Compensation	14			14
141-2-101-7524-7-71100-521210-0000-1120-101	Medicare	1,136			1,136
141-2-101-7524-7-71100-529910-0000-1120-101	Long Term Disability	107			107
141-2-101-7524-7-71100-529930-0000-1120-101	Short Term Disability	116			116
	Total 71100 - Regular Instruction	**105,270**	**-**	**-**	**105,270**
141-2-101-7524-7-72210-510420-PBEN-1120-101	Coordinator - Diploma Completion (1 FTE)	115,254			115,254

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-7524-7-72210-518810-0000-1120-101	Bonus	2,000			2,000
141-2-101-7524-7-72210-520110-0000-1120-101	Social Security	7,270			7,270
141-2-101-7524-7-72210-520410-0000-1120-101	Retirement	10,553			10,553
141-2-101-7524-7-72210-520610-0000-1120-101	Life Insurance	40			40
141-2-101-7524-7-72210-520710-0000-1120-101	Health Insurance	13,320			13,320
141-2-101-7524-7-72210-520810-0000-1120-101	Dental Insurance	294			294
141-2-101-7524-7-72210-521010-0000-1120-101	Unemployment Compensation	14			14
141-2-101-7524-7-72210-521210-0000-1120-101	Medicare	1,700			1,700
141-2-101-7524-7-72210-529910-0000-1120-101	Long Term Disability	107			107
141-2-101-7524-7-72210-529930-0000-1120-101	Short Term Disability	116			116
141-2-101-7524-7-72210-535510-0000-1120-101	Mileage	2,000			2,000
	Total 72210 - Regular Instruction Support	**152,668**	**-**	**-**	**152,668**
	Total Diploma Completion Set Aside	**257,938**	**-**	**-**	**257,938**
Expectation Graduation Program					
141-2-101-6000-0-71100-514090-0000-1122-101	Extended Contracts	264,000			264,000
141-2-101-6000-0-71100-520110-0000-1122-101	Social Security	16,370			16,370
141-2-101-6000-0-71100-520410-0000-1122-101	State Retirement	23,760			23,760
141-2-101-6000-0-71100-521210-0000-1122-101	Medicare	3,830			3,830
141-2-101-6000-0-71100-559990-0000-1122-101	Other Charges	84,000			84,000
	Total 71100 - Regular Instruction	**391,960**	**-**	**-**	**391,960**
141-2-101-6000-0-72710-531410-0000-1122-101	Contracts w/ Public Carriers	181,818			181,818
	Total 72710 - Transportation	**181,818**	**-**	**-**	**181,818**
	Total Expectation Graduation Program	**573,778**	**-**	**-**	**573,778**
Family Engagement					
141-2-101-0000-0-72130-549990-0000-1160-101	Supplies: Channing Betes Books	5,433			5,433
	Total 72130 - Other Student Support	**5,433**	**-**	**-**	**5,433**
	Total Family Engagement	**5,433**	**-**	**-**	**5,433**
Reserve of Funds					
141-2-101-0000-0-72130-559990-0000-1140-101	Other Charges: Set Aside	1,500,000		(643,849)	856,151
	Total 72130 - Other Student Support	**1,500,000**	**-**	**(643,849)**	**856,151**
	Total District Programs	**8,858,599**	**729,574**	**(718,849)**	**8,869,324**
Grace Baptist (Private School)					
141-2-101-9007-5-71100-539990-0000-0000-101	Contracted Services	132,447	66		132,513
	Total 71100 - Regular Instruction	**132,447**	**66**	**-**	**132,513**
141-2-101-9007-5-72130-559990-0000-0000-101	Charges: Parental Involvement	1,104			1,104
	Total 72130 - Other Student Support	**1,104**	**-**	**-**	**1,104**
141-2-101-9007-5-72210-539990-0000-0000-101	Contracted Services	24,000			24,000
	Total 72210 - Regular Instruction Support	**24,000**	**-**	**-**	**24,000**
	Total Grace Baptist	**157,551**	**66**	**-**	**157,617**
Avondale SDA (Private School)					
141-2-101-9010-5-71100-539990-0000-0000-101	Contracted Services	35,056	20		35,076
	Total 71100 - Regular Instruction	**35,056**	**20**	**-**	**35,076**
141-2-101-9010-5-72130-549990-0000-0000-101	Other Materials and Supplies -Parent Involvement	340			340
	Total 72130 - Other Student Support	**340**	**-**	**-**	**340**
	Total Avondale SDA	**35,396**	**20**	**-**	**35,416**
Berean Academy					
141-2-101-9020-5-71100-539990-0000-0000-101	Contracted Services	22,000		(1,000)	21,000
141-2-101-9020-5-71100-542910-0000-0000-101	Instructional Materials and Supplies	9,500	1,031		10,531
	Total 71100 - Regular Instruction	**31,500**	**1,031**	**(1,000)**	**31,531**
141-2-101-9020-5-72130-549990-0000-0000-101	Other Materials and Supplies -Parent Involvement	509	1		510
	Total 72130 - Other Student Support	**509**	**1**	**-**	**510**
141-2-101-9020-5-72210-539990-0000-0000-101	Contracted Services	16,200			16,200
141-2-101-9020-5-72210-552410-0000-0000-101	Staff Development	15,330			15,330
	Total 72210 - Regular Instruction Support	**31,530**	**-**	**-**	**31,530**
	Total Berean Academy	**63,539**	**1,032**	**(1,000)**	**63,571**
Boyd Buchanan (Private School)					
141-2-101-9025-5-71100-539990-0000-0000-101	Contracted Services	59,711			59,711
	Total 71100 - Regular Instruction	**59,711**	**-**	**-**	**59,711**
141-2-101-9025-5-72130-539990-0000-0000-101	Contracted Services	1,950			1,950
141-2-101-9025-5-72130-549990-0000-0000-101	Other Materials and Supplies -Parent Involvement	778	1		779
	Total 72130 - Other Student Support	**2,728**	**1**	**-**	**2,729**
141-2-101-9025-5-72210-539990-0000-0000-101	Contracted Services	9,750			9,750
141-2-101-9025-5-72210-552410-0000-0000-101	Staff Development	10,737	47		10,784

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
	Total 72210 - Regular Instruction Support	**20,487**	**47**	**-**	**20,534**
	Total Boyd Buchanan	**82,926**	**48**	**-**	**82,974**
Brainerd Baptist (Private School)					
141-2-101-9030-5-71100-539990-0000-0000-101	Contracted Services	37,841			37,841
141-2-101-9030-5-71100-542910-0000-0000-101	Instructional Supplies	480	26		506
	Total 71100 - Regular Instruction	**38,321**	**26**	**-**	**38,347**
141-2-101-9030-5-72130-547110-0000-0000-101	Software	1,058			1,058
141-2-101-9030-5-72130-549990-0000-0000-101	Other Supplies and Materials - Parent Involvement	-			-
	Total 72130 - Other Student Support	**1,058**	**-**	**-**	**1,058**
	Total Brainerd Baptist	**39,379**	**26**	**-**	**39,405**
Bright School (Private School)					
141-2-101-9035-5-71100-539990-0000-0000-101	Other Contracted Services	4,656	8		4,664
	Total 71100 - Regular Instruction	**4,656**	**8**	**-**	**4,664**
141-2-101-9035-5-72120-539990-0000-0000-101	Other Contracted Services	6,840			6,840
	Total 72120 - Health Services	**6,840**	**-**	**-**	**6,840**
141-2-101-9035-5-72130-539990-0000-0000-101	Other Contracted Services				
141-2-101-9035-5-72130-549990-0000-0000-101	Materials and Supplies	127			127
	Total 72130 - Other Student Support	**127**	**-**	**-**	**127**
	Total Bright School	**11,623**	**8**	**-**	**11,631**
Chattanooga Christian School (Private School)					
141-2-101-9045-5-71100-539990-0000-0000-101	Other Contracted Services	224,573	133		224,706
	Total 71100 - Regular Instruction	**224,573**	**133**	**-**	**224,706**
141-2-101-9045-5-72130-539990-0000-0000-101	Other Contracted Services				
141-2-101-9045-5-72130-549990-0000-0000-101	Materials and Supplies	1,103	2		1,105
141-2-101-9045-5-72130-559990-0000-0000-101	Charges: Parental Involvement	1,104			1,104
	Total 72130 - Other Student Support	**2,207**	**2**	**-**	**2,209**
	Total Chattanooga Christian School	**226,780**	**135**	**-**	**226,915**
Montessori School (Private School)					
141-2-101-9066-5-71100-539990-0000-0000-101	Other Contracted Services	2,555	1		2,556
	Total 71100 - Regular Instruction	**2,555**	**1**	**-**	**2,556**
141-2-101-9066-5-72130-559990-0000-0000-101	Charges: Parent Involvement	28			28
	Total 72130 - Other Student Support	**28**	**-**	**-**	**28**
	Total Montessori School	**2,583**	**1**	**-**	**2,584**
Hickory Valley Christian School (Private School)					
141-2-101-9075-5-71100-539990-0000-0000-101	Other Contracted Services	4,219	7		4,226
	Total 71100 - Regular Instruction	**4,219**	**7**	**-**	**4,226**
141-2-101-9075-5-72120-539990-0000-0000-101	Other Contracted Services	6,000			6,000
	Total 72120 - Health Services	**6,000**	**-**	**-**	**6,000**
141-2-101-9075-5-72130-559990-0000-0000-101	Charges: Parent Involvement	113			113
	Total 72130 - Other Student Support	**113**	**-**	**-**	**113**
	Total Hickory Valley Christian School	**10,332**	**7**	**-**	**10,339**
Silverdale Academy (Private School)					
141-2-101-9081-5-71100-539990-0000-0000-101	Other Contracted Services	-	18,000		18,000
	Total 71100 - Regular Instruction	**-**	**18,000**	**-**	**18,000**
141-2-101-9081-5-72130-559990-0000-0000-101	Charges: Parent Involvement	743			743
	Total 72130 - Other Student Support	**743**	**-**	**-**	**743**
141-2-101-9081-5-72210-539990-0000-0000-101	Other Contracted Services	77,457		(17,956)	59,501
	Total 72210 - Regular Instruction Support	**77,457**	**-**	**(17,956)**	**59,501**
	Total Silverdale Academy	**78,200**	**18,000**	**(17,956)**	**78,244**
Notre Dame High (Private School)					
141-2-101-9325-5-71100-539990-0000-0000-101	Other Contracted Services	68,504	59		68,563
141-2-101-9325-5-71100-542910-0000-0000-101	Instructional Supplies	63,040			63,040
141-2-101-9325-5-71100-547110-0000-0000-101	Software	6,000			6,000
141-2-101-9325-5-71100-559990-0000-0000-101	Charges: Field Trips, etc	2,120			2,120
	Total 71100 - Regular Instruction	**139,664**	**59**	**-**	**139,723**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-9325-5-72130-532210-0000-0000-101	Evaluation and Testing	22,275			22,275
141-2-101-9325-5-72130-539990-0000-0000-101	Contracted Services	1,750			1,750
141-2-101-9325-5-72130-549990-0000-0000-101	Materials and Supplies	500			500
	Total 72130 - Other Student Support	**24,525**	**-**	**-**	**24,525**
141-2-101-9325-5-72210-552410-0000-0000-101	Staff Development	12,791			12,791
	Total 72210 - Regular Instruction Support	**12,791**	**-**	**-**	**12,791**
141-2-101-9325-5-72710-531410-0000-0000-101	Contracts w/ Public Carriers	6,350			6,350
	Total 72710 - Transportation	**6,350**	**-**	**-**	**6,350**
	Total Notre Dame High	**183,330**	**59**	**-**	**183,389**
Our Lady of Perpetual Help (Private School)					
141-2-101-9115-5-71100-539990-0000-0000-101	Contracted Services	88,722	36		88,758
	Total 71100 - Regular Instruction	**88,722**	**36**	**-**	**88,758**
141-2-101-9115-5-72130-559990-0000-0000-101	Charges: Parent Involvement	601	1		602
	Total 72130 - Other Student Support	**601**	**1**	**-**	**602**
	Total Our Lady of Perpetual Help	**89,323**	**37**	**-**	**89,360**
Saint Jude (Private School)					
141-2-101-9140-5-71100-539990-0000-0000-101	Contracted Services	40,521	24		40,545
	Total 71100 - Regular Instruction	**40,521**	**24**	**-**	**40,545**
141-2-101-9140-5-72130-539990-0000-0000-101	Other Contracted Services	5,000			5,000
141-2-101-9140-5-72130-549990-0000-0000-101	Parent supplies: materials, postage	396			396
	Total 72130 - Other Student Support	**5,396**	**-**	**-**	**5,396**
	Total Saint Jude	**45,917**	**24**	**-**	**45,941**
St. Nicholas					
141-2-101-9145-5-71100-539990-0000-0000-101	Other Contracted Services	9,225			9,225
	Total 71100 - Regular Instruction	**9,225**	**-**	**-**	**9,225**
141-2-101-9145-5-72130-539990-0000-0000-101	Other Contracted Services	1,803	300		2,103
141-2-101-9145-5-72130-559990-0000-0000-101	Charges: Parental Involvement	170			170
	Total 72130 - Other Student Support	**1,973**	**300**	**-**	**2,273**
141-2-101-9145-5-72210-552410-0000-0000-101	Staff Development	4,300		(289)	4,011
	Total 72210 - Regular Instruction Support	**4,300**	**-**	**(289)**	**4,011**
	Total St. Nicholas	**15,498**	**300**	**(289)**	**15,509**
Belvoir Christian Academy					
141-2-101-9090-5-71100-539990-0000-0000-101	Other Contracted Services	49,246	28		49,274
	Total 71100 - Regular Instruction	**49,246**	**28**	**-**	**49,274**
141-2-101-9090-5-72130-549990-0000-0000-101	Other Supplies and Materials - Parent Involvement	233			233
141-2-101-9090-5-72130-559990-0000-0000-101	Charges: Parental Involvement	234			234
	Total 72130 - Other Student Support	**467**	**-**	**-**	**467**
	Total Belvoir Christian Academy	**49,713**	**28**	**-**	**49,741**
Annoor Academy (Private School)					
141-2-101-9181-5-71100-539990-0000-0000-101	Contracted Services	6,596	13		6,609
141-2-101-9181-5-71100-542910-0000-0000-101	Instructional Supplies	22,000			22,000
	Total 71100 - Regular Instruction	**28,596**	**13**	**-**	**28,609**
141-2-101-9181-5-72130-549990-0000-0000-101	Supplies, Awards, Postage	226	1		227
	Total 72130 - Other Student Support	**226**	**1**	**-**	**227**
	Total Annoor Academy	**28,822**	**14**	**-**	**28,836**
Skyuka Hall					
141-2-101-9120-5-71100-539990-0000-0000-101	Contracted Services	15,000	12		15,012
	Total 71100 - Regular Instruction	**15,000**	**12**	**-**	**15,012**
141-2-101-9120-5-72130-532210-0000-0000-101	Evaluation and Testing	2,100			2,100
141-2-101-9120-5-72130-559990-0000-0000-101	Charges: Parental Involvement	198			198
	Total 72130 - Other Student Support	**2,298**	**-**	**-**	**2,298**
141-2-101-9120-5-72210-552410-0000-0000-101	Staff Development	12,640			12,640
	Total 72210 - Regular Instruction Support	**12,640**	**-**	**-**	**12,640**
	Total Skyuka Hall	**29,938**	**12**	**-**	**29,950**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
St. Peter's					
141-2-101-9147-5-71100-539990-0000-0000-101	Contracted Services	40,170	21		40,191
	Total 71100 - Regular Instruction	**40,170**	**21**	**-**	**40,191**
141-2-101-9147-5-72130-559990-0000-0000-101	Charges: Parental Involvement	354			354
	Total 72130 - Other Student Support	**354**	**-**	**-**	**354**
	Total St. Peter's	**40,524**	**21**	**-**	**40,545**
Beacon Academy					
141-2-101-9823-5-71100-539990-0000-0000-101	Contracted Services	9,774	4		9,778
141-2-101-9823-5-71100-547110-0000-0000-101	Software	-			-
	Total 72130 - Other Student Support	**9,774**	**4**	**-**	**9,778**
141-2-101-9823-5-72130-549990-0000-0000-101	Supplies and Materials - Parent Involvement	71			71
	Total 72130 - Other Student Support	**71**	**-**	**-**	**71**
	Total Beacon Academy	**9,845**	**4**	**-**	**9,849**
Redemption Point Christian Academy					
141-2-101-9898-5-71100-542910-0000-0000-101	Instructional Supplies	3,206	3		3,209
	Total 71100 - Regular Instruction	**3,206**	**3**	**-**	**3,209**
141-2-101-9898-5-72130-559990-0000-0000-101	Parent Meeting Expense	35			35
	Total 72130 - Other Student Support	**35**	**-**	**-**	**35**
	Total Redemption Point Christian Academy	**3,241**	**3**	**-**	**3,244**
Mission Montessori School					
141-2-101-9941-5-71100-539990-0000-0000-101	Contracted Services	1,916	1		1,917
	Total 71100 - Regular Instruction	**1,916**	**1**	**-**	**1,917**
141-2-101-9941-5-72130-559990-0000-0000-101	Parent Meeting Expense	21			21
	Total 72130 - Other Student Support	**21**	**-**	**-**	**21**
	Total Mission Montessori School	**1,937**	**1**	**-**	**1,938**
	Total Private Schools	**1,206,397**	**19,846**	**(19,245)**	**1,206,998**
Central High					
141-2-101-0040-3-71100-516350-PBEN-0000-101	Educational Assistant - Behavior (1 FTE)	34,390			34,390
141-2-101-0040-3-71100-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0040-3-71100-520110-0000-0000-101	Social Security	2,256			2,256
141-2-101-0040-3-71100-520410-0000-0000-101	Retirement	5,349			5,349
141-2-101-0040-3-71100-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0040-3-71100-520710-0000-0000-101	Health Insurance	13,320			13,320
141-2-101-0040-3-71100-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0040-3-71100-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0040-3-71100-521210-0000-0000-101	Medicare	528			528
141-2-101-0040-3-71100-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0040-3-71100-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0040-3-71100-542910-0000-0000-101	Instructional Supplies	18,986		(10,000)	8,986
	Total 71100 - Regular Instruction	**77,400**	**-**	**(10,000)**	**67,400**
141-2-101-0040-3-72130-512310-PBEN-0000-101	Guidance Personnel (1 FTE)	60,940			60,940
141-2-101-0040-3-72130-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0040-3-72130-520110-0000-0000-101	Social Security	3,902			3,902
141-2-101-0040-3-72130-520410-0000-0000-101	Retirement	5,665			5,665
141-2-101-0040-3-72130-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0040-3-72130-520710-0000-0000-101	Health Insurance	13,320			13,320
141-2-101-0040-3-72130-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0040-3-72130-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0040-3-72130-521210-0000-0000-101	Medicare	913			913
141-2-101-0040-3-72130-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0040-3-72130-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0040-3-72130-559990-0000-0000-101	Charges: Parental Involvement	4,205			4,205
	Total 72130 - Other Student Support	**91,516**	**-**	**-**	**91,516**
141-2-101-0040-3-72210-516210-0000-0000-101	Classified Overtime	2,500			2,500
141-2-101-0040-3-72210-5189E0-PWOB-0000-101	Dean (.5 FTE)	29,070			29,070
141-2-101-0040-3-72210-520110-0000-0000-101	Social Security	1,957			1,957
141-2-101-0040-3-72210-520410-0000-0000-101	Retirement	368			368
141-2-101-0040-3-72210-520770-0000-0000-101	Health Insurance - Part-time	525			525
141-2-101-0040-3-72210-521210-0000-0000-101	Medicare	458			458
141-2-101-0040-3-72210-552410-0000-0000-101	Staff Development	-	10,000		10,000
	Total 72210 - Regular Instruction Support	**34,878**	**10,000**	**-**	**44,878**
	Total Central High	**203,794**	**10,000**	**(10,000)**	**203,794**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
East Ridge High					
141-2-101-0070-3-71100-514090-0000-0000-101	Teacher Supplements	20,000			20,000
141-2-101-0070-3-71100-516310-PBEN-0000-101	Educational Assistant (1 FTE)	30,139			30,139
141-2-101-0070-3-71100-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0070-3-71100-520110-0000-0000-101	Social Security	3,233			3,233
141-2-101-0070-3-71100-520410-0000-0000-101	Retirement	6,524			6,524
141-2-101-0070-3-71100-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0070-3-71100-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0070-3-71100-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0070-3-71100-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0070-3-71100-521210-0000-0000-101	Medicare	756			756
141-2-101-0070-3-71100-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0070-3-71100-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0070-3-71100-542910-0000-0000-101	Instructional Supplies	40,895			40,895
	Total 71100 - Regular Instruction	**117,438**	**-**	**-**	**117,438**
141-2-101-0070-3-71200-516340-PBEN-0000-101	Educational Assistant - ExEd (1 FTE)	31,549			31,549
141-2-101-0070-3-71200-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0070-3-71200-520110-0000-0000-101	Social Security	2,080			2,080
141-2-101-0070-3-71200-520410-0000-0000-101	Retirement	4,932			4,932
141-2-101-0070-3-71200-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0070-3-71200-520710-0000-0000-101	Health Insurance	13,320			13,320
141-2-101-0070-3-71200-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0070-3-71200-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0070-3-71200-521210-0000-0000-101	Medicare	486			486
141-2-101-0070-3-71200-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0070-3-71200-529930-0000-0000-101	Short Term Disability	116			116
	Total 71200 - Special Education Program	**54,938**	**-**	**-**	**54,938**
141-2-101-0070-3-72130-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0070-3-72130-5189B0-PBEN-0000-101	Truancy Specialist (1 FTE)	51,655			51,655
141-2-101-0070-3-72130-520110-0000-0000-101	Social Security	3,327			3,327
141-2-101-0070-3-72130-520410-0000-0000-101	Retirement	7,887			7,887
141-2-101-0070-3-72130-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0070-3-72130-520710-0000-0000-101	Health Insurance	13,320			13,320
141-2-101-0070-3-72130-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0070-3-72130-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0070-3-72130-521210-0000-0000-101	Medicare	778			778
141-2-101-0070-3-72130-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0070-3-72130-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0070-3-72130-539990-0000-0000-101	Contracted Services	29,000			29,000
141-2-101-0070-3-72130-547110-0000-0000-101	Software	3,000			3,000
141-2-101-0070-3-72130-559990-0000-0000-101	Parent Meeting Expense	6,103			6,103
	Total 72130 - Other Student Support	**117,641**	**-**	**-**	**117,641**
141-2-101-0070-3-72210-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0070-3-72210-5189E0-PBEN-0000-101	Dean of Academic Success (1 FTE)	65,111			65,111
141-2-101-0070-3-72210-520110-0000-0000-101	Social Security	4,161			4,161
141-2-101-0070-3-72210-520410-0000-0000-101	Retirement	6,040			6,040
141-2-101-0070-3-72210-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0070-3-72210-520710-0000-0000-101	Health Insurance	13,320			13,320
141-2-101-0070-3-72210-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0070-3-72210-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0070-3-72210-521210-0000-0000-101	Medicare	973			973
141-2-101-0070-3-72210-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0070-3-72210-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0070-3-72210-552410-0000-0000-101	Staff Development	15,000			15,000
	Total 72210 - Regular Instruction Support	**107,176**	**-**	**-**	**107,176**
	Total East Ridge High	**397,193**	**-**	**-**	**397,193**
Hixson High					
141-2-101-0128-3-71100-513450-PWOB-0000-101	Instructional Personnel-Interventionist/Tutor Part-Time (1 FTE)	20,650			20,650
141-2-101-0128-3-71100-514090-0000-0000-101	Teacher Supplements	17,800			17,800
141-2-101-0128-3-71100-516350-PBEN-0000-101	Educational Assistant - Behavior (1 FTE)	34,100			34,100
141-2-101-0128-3-71100-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0128-3-71100-520110-0000-0000-101	Social Security	4,623			4,623
141-2-101-0128-3-71100-520410-0000-0000-101	Retirement	6,909			6,909
141-2-101-0128-3-71100-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0128-3-71100-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0128-3-71100-520770-0000-0000-101	Medical Insurance - Part-time	525			525
141-2-101-0128-3-71100-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0128-3-71100-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0128-3-71100-521210-0000-0000-101	Medicare	1,081			1,081
141-2-101-0128-3-71100-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0128-3-71100-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0128-3-71100-542910-0000-0000-101	Instructional Supplies	37,512			37,512
	Total 71100 - Regular Instruction	**139,091**	**-**	**-**	**139,091**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-0128-3-72130-518810-0000-0000-101	Bonus	1,000			1,000
141-2-101-0128-3-72130-5189B0-0000-0000-101	Truancy Specialist (.5 FTE)	27,500			27,500
141-2-101-0128-3-72130-520110-0000-0000-101	Social Security	1,767			1,767
141-2-101-0128-3-72130-520410-0000-0000-101	Retirement	4,190			4,190
141-2-101-0128-3-72130-520610-0000-0000-101	Life Insurance	20			20
141-2-101-0128-3-72130-520710-0000-0000-101	Medical Insurance	6,660			6,660
141-2-101-0128-3-72130-520810-0000-0000-101	Dental Insurance	147			147
141-2-101-0128-3-72130-521010-0000-0000-101	Unemployment Compensation	7			7
141-2-101-0128-3-72130-521210-0000-0000-101	Medicare	413			413
141-2-101-0128-3-72130-529910-0000-0000-101	Long Term Disability	54			54
141-2-101-0128-3-72130-529930-0000-0000-101	Short Term Disability	58			58
141-2-101-0128-3-72130-559990-0000-0000-101	Charges: Parental Involvement	8,000			8,000
	Total 72130 - Other Student Support	**49,816**	**-**	**-**	**49,816**
	Total Hixson High	**188,907**	**-**	**-**	**188,907**
Ooltewah High					
141-2-101-0160-3-71100-513450-PWOB-0000-101	Instructional Personnel-Interventionist/Tutor Part-Time (.5 FTE)	26,550			26,550
141-2-101-0160-3-71100-514090-0000-0000-101	Teacher Supplements	20,000			20,000
141-2-101-0160-3-71100-516350-PBEN-0000-101	Educational Assistant - Behavior (1 FTE)	34,100			34,100
141-2-101-0160-3-71100-520110-0000-0000-101	Social Security	5,000			5,000
141-2-101-0160-3-71100-520410-0000-0000-101	Retirement	5,000			5,000
141-2-101-0160-3-71100-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0160-3-71100-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0160-3-71100-520770-0000-0000-101	Medical Insurance - Part-time	525			525
141-2-101-0160-3-71100-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0160-3-71100-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0160-3-71100-521210-0000-0000-101	Medicare	1,169			1,169
141-2-101-0160-3-71100-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0160-3-71100-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0160-3-71100-542910-0000-0000-101	Instructional Supplies	39,010		(10,000)	29,010
141-2-101-0160-3-71100-559990-0000-0000-101	Other Charges	-	10,000		10,000
	Total 71100 - Regular Instruction	**145,245**	**10,000**	**(10,000)**	**145,245**
141-2-101-0160-3-72130-559990-0000-0000-101	Charges: Parental Involvement	7,500			7,500
	Total 72130 - Other Student Support	**7,500**	**-**	**-**	**7,500**
141-2-101-0160-3-72210-5140M0-0000-0000-101	Stipend - Multi-Classroom Lead	10,000			10,000
141-2-101-0160-3-72210-520110-0000-0000-101	Social Security	620			620
141-2-101-0160-3-72210-520410-0000-0000-101	Retirement	900			900
141-2-101-0160-3-72210-521210-0000-0000-101	Medicare	145			145
141-2-101-0160-3-72210-552410-0000-0000-101	Staff Development	18,703			18,703
	Total 72210 - Regular Instruction Support	**30,368**	**-**	**-**	**30,368**
141-2-101-0160-3-72710-531410-0000-0000-101	Contracts w/ Public Carriers	28,350			28,350
	Total 72710 - Transportation	**28,350**	**-**	**-**	**28,350**
	Total Ooltewah High	**211,463**	**10,000**	**(10,000)**	**211,463**
Red Bank High					
141-2-101-0175-3-71100-514090-0000-0000-101	Teacher Supplements	3,140	2,572		5,712
141-2-101-0175-3-71100-516350-PBEN-0000-101	Educational Assistant - Behavior (2 FTE)	66,106			66,106
141-2-101-0175-3-71100-518810-0000-0000-101	Bonus	4,000			4,000
141-2-101-0175-3-71100-520110-0000-0000-101	Social Security	4,541	159		4,700
141-2-101-0175-3-71100-520410-0000-0000-101	Retirement	10,504	231		10,735
141-2-101-0175-3-71100-520610-0000-0000-101	Life Insurance	80			80
141-2-101-0175-3-71100-520710-0000-0000-101	Medical Insurance	26,640			26,640
141-2-101-0175-3-71100-520810-0000-0000-101	Dental Insurance	588			588
141-2-101-0175-3-71100-521010-0000-0000-101	Unemployment Compensation	28			28
141-2-101-0175-3-71100-521210-0000-0000-101	Medicare	1,062	37		1,099
141-2-101-0175-3-71100-529910-0000-0000-101	Long Term Disability	214			214
141-2-101-0175-3-71100-529930-0000-0000-101	Short Term Disability	232			232
141-2-101-0175-3-71100-542910-0000-0000-101	Instructional Supplies	17,600		(7,999)	9,601
	Total 71100 - Regular Instruction	**134,735**	**2,999**	**(7,999)**	**129,735**
141-2-101-0175-3-72130-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0175-3-72130-5189G0-PBEN-0000-101	Behavior Management Specialist (1 FTE)	44,764			44,764
141-2-101-0175-3-72130-520110-0000-0000-101	Social Security	2,899			2,899
141-2-101-0175-3-72130-520410-0000-0000-101	Retirement	6,018			6,018
141-2-101-0175-3-72130-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0175-3-72130-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0175-3-72130-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0175-3-72130-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0175-3-72130-521210-0000-0000-101	Medicare	678			678
141-2-101-0175-3-72130-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0175-3-72130-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0175-3-72130-559990-0000-0000-101	Charges: Parental Involvement	7,535			7,535
	Total 72130 - Other Student Support	**77,785**	**-**	**-**	**77,785**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-0175-3-72210-519610-0000-0000-101	In-Service Stipends	4,680			4,680
141-2-101-0175-3-72210-520110-0000-0000-101	Social Security	290			290
141-2-101-0175-3-72210-520410-0000-0000-101	Retirement	420			420
141-2-101-0175-3-72210-521210-0000-0000-101	Medicare	68			68
141-2-101-0175-3-72210-552410-0000-0000-101	Staff Development	736			736
	Total 72210 - Regular Instruction Support	**6,194**	**-**	**-**	**6,194**
141-2-101-0175-3-72710-531410-0000-0000-101	Contracts w/ Public Carriers	-	5,000		5,000
	Total 72710 - Transportation	**-**	**5,000**	**-**	**5,000**
	Total Red Bank High	**218,714**	**7,999**	**(7,999)**	**218,714**
Sequoyah High					
141-2-101-0196-3-71100-514090-0000-0000-101	Teacher Supplements	4,320			4,320
141-2-101-0196-3-71100-520110-0000-0000-101	Social Security	268			268
141-2-101-0196-3-71100-520410-0000-0000-101	Retirement	389			389
141-2-101-0196-3-71100-521210-0000-0000-101	Medicare	63			63
141-2-101-0196-3-71100-542910-0000-0000-101	Instructional Supplies	13,129			13,129
	Total 71100 - Regular Instruction	**18,169**	**-**	**-**	**18,169**
141-2-101-0196-3-72130-559990-0000-0000-101	Charges: Parental Involvement	3,000			3,000
	Total 72130 - Other Student Support	**3,000**	**-**	**-**	**3,000**
141-2-101-0196-3-72210-519610-0000-0000-101	In-Service Stipends	7,780			7,780
141-2-101-0196-3-72210-520110-0000-0000-101	Social Security	482			482
141-2-101-0196-3-72210-520410-0000-0000-101	Retirement	700			700
141-2-101-0196-3-72210-521210-0000-0000-101	Medicare	113			113
141-2-101-0196-3-72210-552410-0000-0000-101	Staff Development	5,000			5,000
	Total 72210 - Regular Instruction Support	**14,075**	**-**	**-**	**14,075**
	Total Sequoyah High	**35,244**	**-**	**-**	**35,244**
Brainerd High					
141-2-101-0021-3-71100-542910-0000-0000-101	Instructional Supplies	58,136		(5,000)	53,136
141-2-101-0021-3-71100-547110-0000-0000-101	Sotware	-	5,000		5,000
	Total 71100 - Regular Instruction	**58,136**	**5,000**	**(5,000)**	**58,136**
141-2-101-0021-3-72130-518810-0000-0000-101	Bonus	6,000			6,000
141-2-101-0021-3-72130-5189G0-PBEN-0000-101	Behavior Management Specialist (3 FTE)	137,487			137,487
141-2-101-0021-3-72130-520110-0000-0000-101	Social Security	8,896			8,896
141-2-101-0021-3-72130-520410-0000-0000-101	Retirement	21,093			21,093
141-2-101-0021-3-72130-520610-0000-0000-101	Life Insurance	120			120
141-2-101-0021-3-72130-520710-0000-0000-101	Health Insurance	39,960			39,960
141-2-101-0021-3-72130-520810-0000-0000-101	Dental Insurance	882			882
141-2-101-0021-3-72130-521010-0000-0000-101	Unemployment Compensation	42			42
141-2-101-0021-3-72130-521210-0000-0000-101	Medicare	2,081			2,081
141-2-101-0021-3-72130-529910-0000-0000-101	Long Term Disability	321			321
141-2-101-0021-3-72130-529930-0000-0000-101	Short Term Disability	348			348
141-2-101-0021-3-72130-559990-0000-0000-101	Charges: Parental Involvement	5,241			5,241
	Total 72130 - Other Student Support	**222,471**	**-**	**-**	**222,471**
141-2-101-0021-3-72710-531410-0000-0000-101	Contracts w/ Public Carriers	40,000			40,000
	Total 72710 - Transportation	**40,000**	**-**	**-**	**40,000**
	Total Brainerd High	**320,607**	**5,000**	**(5,000)**	**320,607**
Howard School of Academics/Technology					
141-2-101-0137-3-71100-514090-0000-0000-101	Teacher Supplements	82,239			82,239
141-2-101-0137-3-71100-520110-0000-0000-101	Social Security	5,099			5,099
141-2-101-0137-3-71100-520410-0000-0000-101	Retirement	8,542			8,542
141-2-101-0137-3-71100-521210-0000-0000-101	Medicare	1,192			1,192
141-2-101-0137-3-71100-539980-0000-0000-101	Contract Substitutes	963			963
141-2-101-0137-3-71100-542910-0000-0000-101	Instructional Supplies	61,575			61,575
141-2-101-0137-3-71100-559990-0000-0000-101	Charges: Field Trips, etc	10,000			10,000
	Total 71100 - Regular Instruction	**169,610**	**-**	**-**	**169,610**
141-2-101-0137-3-72130-518810-0000-0000-101	Bonus	8,000			8,000
141-2-101-0137-3-72130-518970-PBEN-0000-101	Family Partnership Specialist (1 FTE)	2,287			2,287
141-2-101-0137-3-72130-5189G0-0000-0000-101	Behavior Management Specialist (2 FTE)	94,202			94,202
141-2-101-0137-3-72130-5189B0-0000-0000-101	Truancy Specialist (2 FTE)	111,465			111,465
141-2-101-0137-3-72130-520110-0000-0000-101	Social Security	13,389			13,389
141-2-101-0137-3-72130-520410-0000-0000-101	Retirement	21,755			21,755
141-2-101-0137-3-72130-520610-0000-0000-101	Life Insurance	163			163
141-2-101-0137-3-72130-520710-0000-0000-101	Medical Insurance	54,004			54,004
141-2-101-0137-3-72130-520810-0000-0000-101	Dental Insurance	1,192			1,192
141-2-101-0137-3-72130-521010-0000-0000-101	Unemployment Compensation	57			57
141-2-101-0137-3-72130-521210-0000-0000-101	Medicare	3,132			3,132
141-2-101-0137-3-72130-529910-0000-0000-101	Long Term Disability	434			434
141-2-101-0137-3-72130-529930-0000-0000-101	Short Term Disability	471			471
141-2-101-0137-3-72130-559990-0000-0000-101	Charges: Parental Involvement	15,000			15,000
	Total 72130 - Other Student Support	**325,551**	**-**	**-**	**325,551**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-0137-3-72210-513810-PBEN-0000-101	Computer Technician (1 FTE)	32,016			32,016
141-2-101-0137-3-72210-518810-0000-0000-101	Bonus	4,000			4,000
141-2-101-0137-3-72210-5189E0-PBEN-0000-101	Dean of Students (1 FTE)	61,325			61,325
141-2-101-0137-3-72210-519610-0000-0000-101	In-Service Stipends	5,000			5,000
141-2-101-0137-3-72210-520110-0000-0000-101	Social Security	6,531			6,531
141-2-101-0137-3-72210-520410-0000-0000-101	Retirement	8,991			8,991
141-2-101-0137-3-72210-520610-0000-0000-101	Life Insurance	80			80
141-2-101-0137-3-72210-520710-0000-0000-101	Health Insurance	26,640			26,640
141-2-101-0137-3-72210-520810-0000-0000-101	Dental Insurance	588			588
141-2-101-0137-3-72210-521010-0000-0000-101	Unemployment Compensation	28			28
141-2-101-0137-3-72210-521210-0000-0000-101	Medicare	1,528			1,528
141-2-101-0137-3-72210-529910-0000-0000-101	Long Term Disability	214			214
141-2-101-0137-3-72210-529930-0000-0000-101	Short Term Disability	232			232
141-2-101-0137-3-72210-552410-0000-0000-101	Staff Development	12,000			12,000
	Total 72210 - Regular Instruction Support	**159,173**	**-**	**-**	**159,173**
141-2-101-0137-3-72710-531410-0000-0000-101	Contracts w/ Public Carriers	30,000			30,000
	Total 72710 - Transportation	**30,000**	**-**	**-**	**30,000**
	Total Howard School of Academics/Technology	**684,334**	**-**	**-**	**684,334**
Lookout Valley Middle/High					
141-2-101-0165-4-71100-514090-0000-0000-101	Teacher Supplements	4,000			4,000
141-2-101-0165-4-71100-516350-PBEN-0000-101	Educational Assistant - Behavior (1 FTE)	31,935			31,935
141-2-101-0165-4-71100-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0165-4-71100-520110-0000-0000-101	Social Security	2,352			2,352
141-2-101-0165-4-71100-520410-0000-0000-101	Retirement	5,348			5,348
141-2-101-0165-4-71100-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0165-4-71100-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0165-4-71100-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0165-4-71100-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0165-4-71100-521210-0000-0000-101	Medicare	550			550
141-2-101-0165-4-71100-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0165-4-71100-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0165-4-71100-542910-0000-0000-101	Instructional Supplies	9,549			9,549
	Total 71100 - Regular Instruction	**69,625**	**-**	**-**	**69,625**
141-2-101-0165-4-72130-549990-0000-0000-101	Other Supplies and Materials	1,946			1,946
	Total 72130 - Other Student Support	**1,946**	**-**	**-**	**1,946**
141-2-101-0165-4-72210-516210-0000-0000-101	Classified Extended Contract	2,500			2,500
141-2-101-0165-4-72210-517210-0000-0000-101	Instructional Coach Supplemental	3,700			3,700
141-2-101-0165-4-72210-520110-0000-0000-101	Social Security	384			384
141-2-101-0165-4-72210-520410-0000-0000-101	Retirement	701			701
141-2-101-0165-4-72210-521210-0000-0000-101	Medicare	90			90
	Total 72210 - Regular Instruction Support	**7,375**	**-**	**-**	**7,375**
	TOTAL Lookout Valley Middle/High	**78,946**	**-**	**-**	**78,946**
Tyner Middle/High					
141-2-101-0238-4-71100-514090-0000-0000-101	Teacher Supplements	25,000	8,000		33,000
141-2-101-0238-4-71100-516350-PBEN-0000-101	Educational Assistant - Behavior (1 FTE)	26,100			26,100
141-2-101-0238-4-71100-520110-0000-0000-101	Social Security	3,168	496		3,664
141-2-101-0238-4-71100-520410-0000-0000-101	Retirement	6,793	1,461		8,254
141-2-101-0238-4-71100-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0238-4-71100-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0238-4-71100-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0238-4-71100-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0238-4-71100-521210-0000-0000-101	Medicare	741	116		857
141-2-101-0238-4-71100-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0238-4-71100-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0238-4-71100-542910-0000-0000-101	Instructional Supplies	35,800		(10,073)	25,727
141-2-101-0238-4-71100-547110-0000-0000-101	Software	6,000			6,000
141-2-101-0238-4-71100-559990-0000-0000-101	Other Charges	9,055			9,055
	Total 71100 - Regular Instruction	**126,548**	**10,073**	**(10,073)**	**126,548**
141-2-101-0238-4-72130-518810-0000-0000-101	Bonus	6,000			6,000
141-2-101-0238-4-72130-518970-PBEN-0000-101	Family Partnership Specialist (1 FTE)	50,891			50,891
141-2-101-0238-4-72130-5189G0-PBEN-0000-101	Behavior Management Specialist (2 FTE)	101,200			101,200
141-2-101-0238-4-72130-520110-0000-0000-101	Social Security	9,801			9,801
141-2-101-0238-4-72130-520410-0000-0000-101	Retirement	22,885			22,885
141-2-101-0238-4-72130-520610-0000-0000-101	Life Insurance	120			120
141-2-101-0238-4-72130-520710-0000-0000-101	Medical Insurance	39,960			39,960
141-2-101-0238-4-72130-520810-0000-0000-101	Dental Insurance	882			882
141-2-101-0238-4-72130-521010-0000-0000-101	Unemployment Compensation	42			42
141-2-101-0238-4-72130-521210-0000-0000-101	Medicare	2,292			2,292
141-2-101-0238-4-72130-529910-0000-0000-101	Long Term Disability	321			321
141-2-101-0238-4-72130-529930-0000-0000-101	Short Term Disability	348			348
141-2-101-0238-4-72130-547110-0000-0000-101	Software	11,529			11,529
141-2-101-0238-4-72130-549990-0000-0000-101	Supplies, Awards, Postage	3,150			3,150
141-2-101-0238-4-72130-559990-0000-0000-101	Charges: Parental Involvement	4,000			4,000
	Total 72130 - Other Student Support	**253,421**	**-**	**-**	**253,421**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-0238-4-72210-5140M0-0000-0000-101	Stipend - Multi Classroom Lead	40,000			40,000
141-2-101-0238-4-72210-520110-0000-0000-101	Social Security	2,480			2,480
141-2-101-0238-4-72210-520410-0000-0000-101	Retirement	3,600			3,600
141-2-101-0238-4-72210-521210-0000-0000-101	Medicare	580			580
141-2-101-0238-4-72210-552410-0000-0000-101	Staff Development	25,000			25,000
	Total 72210 - Regular Instruction Support	**71,660**	**-**	**-**	**71,660**
141-2-101-0238-4-72710-531410-0000-0000-101	Contracts w/ Public Carriers	15,000			15,000
	Total 72710 - Transportation	**15,000**	**-**	**-**	**15,000**
	Total Tyner Middle/High	**466,629**	**10,073**	**(10,073)**	**466,629**
Hamilton County Virtual School					
141-2-101-0275-4-71100-5116G0-PBEN-0000-101	Teacher - RTI (.25 FTE)	14,884			14,884
141-2-101-0275-4-71100-518810-0000-0000-101	Teacher Bonuses	500		(500)	-
141-2-101-0275-4-71100-520110-0000-0000-101	Social Security	954		(31)	923
141-2-101-0275-4-71100-520410-0000-0000-101	Retirement	1,385		(40)	1,345
141-2-101-0275-4-71100-520610-0000-0000-101	Life Insurance	10			10
141-2-101-0275-4-71100-520710-0000-0000-101	Medical Insurance	3,330			3,330
141-2-101-0275-4-71100-520810-0000-0000-101	Dental Insurance	74			74
141-2-101-0275-4-71100-521010-0000-0000-101	Unemployment Compensation	4			4
141-2-101-0275-4-71100-521210-0000-0000-101	Medicare	223		(7)	216
141-2-101-0275-4-71100-529910-0000-0000-101	Long Term Disability	27			27
141-2-101-0275-4-71100-529930-0000-0000-101	Short Term Disability	29			29
141-2-101-0275-4-71100-542910-0000-0000-101	Instructional Supplies	3,600		(1,200)	2,400
141-2-101-0275-4-71100-547110-0000-0000-101	Software	5,000		(1,200)	3,800
141-2-101-0275-4-71100-559990-0000-0000-101	Other Charges	4,735			4,735
	Total 71100 - Regular Instruction	**34,755**	**-**	**(2,978)**	**31,777**
141-2-101-0275-4-72130-539990-0000-0000-101	Contracted Services - Parent	500			500
141-2-101-0275-4-72130-559990-0000-0000-101	Charges: Parental Involvement	501	2,400		2,901
	Total 72130 - Other Student Support	**1,001**	**2,400**	**-**	**3,401**
141-2-101-0275-4-72710-531410-0000-0000-101	Contracts w/ Public Carriers	4,845	578		5,423
	Total 72710 - Transportation	**4,845**	**578**	**-**	**5,423**
	Total Hamilton County Virtual School	**40,601**	**2,978**	**(2,978)**	**40,601**
Chattanooga Girls Leadership Academy					
141-2-101-8001-8-71100-542910-0000-0000-101	Instructional Supplies	23,175	8,134		31,309
141-2-101-8001-8-71100-547110-0000-0000-101	Software	45,000		(13,134)	31,866
	Total 71100 - Regular Instruction	**68,175**	**8,134**	**(13,134)**	**63,175**
141-2-101-8001-8-72130-549990-0000-0000-101	Parent Materials and Supplies	300			300
141-2-101-8001-8-72130-559990-0000-0000-101	Charges: Behavior Specialists Part-Time (.5 FTE)	12,000			12,000
141-2-101-8001-8-72130-559990-0000-0000-101	Charges: Parental Involvement	2,112			2,112
	Total 72130 - Other Student Support	**14,412**	**-**	**-**	**14,412**
141-2-101-8001-8-72210-559990-0000-0000-101	Charges: PD Stipends	3,500	5,000		8,500
141-2-101-8001-8-72210-559990-0000-0000-101	Charges: Instructional Coach (1.0 FTE Part-time .7 FTE Full-time)	72,158			72,158
	Total 72210 - Regular Instruction Support	**75,658**	**5,000**	**-**	**80,658**
	Total Chattanooga Girls Leadership Academy	**158,245**	**13,134**	**(13,134)**	**158,245**
Chattanooga Charter School of Excellence					
141-2-101-8003-8-71100-542910-0000-0000-101	Instructional Supplies	11,625		(11,625)	-
141-2-101-8003-8-71100-559990-0000-0000-101	Charges: Educational Assistant	-	11,625		11,625
	Total 71100 - Regular Instruction	**11,625**	**11,625**	**(11,625)**	**11,625**
141-2-101-8003-8-72130-559990-0000-0000-101	Charges: Counselor (1 FTE)	68,671			68,671
141-2-101-8003-8-72130-559990-0000-0000-101	Charges: Behavior Management Specialist (1 FTE)	53,067			53,067
141-2-101-8003-8-72130-559990-0000-0000-101	Other Charges - Parent Meeting	3,232			3,232
	Total 72130 - Other Student Support	**124,970**	**-**	**-**	**124,970**
141-2-101-8003-8-72210-559990-0000-0000-101	Charges: Curriculum Coaches (1 FTE)	87,512			87,512
	Total 72210 - Regular Instruction Support	**87,512**	**-**	**-**	**87,512**
	Total Chattanooga Charter School of Excellence	**224,107**	**11,625**	**(11,625)**	**224,107**
Chatt Academy Community School					
141-2-101-8006-8-71100-542910-0000-0000-101	Instructional Supplies	3,675			3,675
	Total 71100 - Regular Instruction	**3,675**	**-**	**-**	**3,675**
141-2-101-8006-8-71200-559990-0000-0000-101	Charges: ExEd Assistant (1 FTE)	40,000			40,000
	Total 71200 - Special Education Program	**40,000**	**-**	**-**	**40,000**
141-2-101-8006-8-72130-559990-0000-0000-101	Charges: Parent Meetings	1,022			1,022
	Total 72130 - Other Student Support	**1,022**	**-**	**-**	**1,022**
141-2-101-8006-8-72710-531410-0000-0000-101	Contracts with Public Carriers	17,457			17,457
	Total 72710 - Transportation	**17,457**	**-**	**-**	**17,457**
	Total Chatt Academy Community School	**62,154**	**-**	**-**	**62,154**
Chattanooga Charter School of Excellence Middle School					

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-8-101-8010-8-71100-542910-0000-0000-101	Instructional Supplies	6,100		(6,100)	-
	Total 71100 - Regular Instruction	**6,100**	**-**	**(6,100)**	**-**
141-8-101-8010-8-72130-559990-0000-0000-101	Charges: Counselor	89,855			89,855
141-8-101-8010-8-72130-559990-0000-0000-101	Charges: Parent Meetings	1,696			1,696
	Total 72130 - Other Student Support	**91,551**	**-**	**-**	**91,551**
141-8-101-8010-8-72210-559990-0000-0000-101	Charges: Curriculum Coaches (.54 FTE)	19,945	6,100		26,045
	Total 72210 - Regular Instruction Support	**19,945**	**6,100**	**-**	**26,045**
	Total CCSE Middle	**117,596**	**6,100**	**(6,100)**	**117,596**
Chattanooga Charter School of Excellence High School					
141-2-101-8015-8-71100-542910-0000-0000-101	Instructional Supplies	4,050		(4,050)	-
	Total 71100 - Regular Instruction	**4,050**	**-**	**(4,050)**	**-**
141-2-101-8015-8-72130-559990-0000-0000-101	Charges: Family Partnership Sp (.02 FTE)	1,126			1,126
	Total 72130 - Other Student Support	**1,126**	**-**	**-**	**1,126**
141-2-101-8015-8-72210-559990-0000-0000-101	Charges: Curriculum Coaches (1 FTE)	72,900	4,050		76,950
	Total 72210 - Regular Instruction Support	**72,900**	**4,050**	**-**	**76,950**
	Total CCSE High	**78,076**	**4,050**	**(4,050)**	**78,076**
Chattanooga Preparatory School					
141-2-101-8011-8-71100-542910-0000-0000-101	Instructional Supplies	11,075		(11,075)	-
141-2-101-8011-8-71100-547110-0000-0000-101	Software	-	3,840		3,840
	Total 71100 - Regular Instruction	**11,075**	**3,840**	**(11,075)**	**3,840**
141-2-101-8011-8-72130-549990-0000-0000-101	Charges: Parent Materials and Supplies	3,079			3,079
141-2-101-8011-8-72130-559990-0000-0000-101	Charges: Other Student Support Salaries BMS (1 FTE)	33,721	7,235		40,956
	Total 72130 - Other Student Support	**36,800**	**7,235**	**-**	**44,035**
141-2-101-8011-8-72210-559990-0000-0000-101	Charges: Dean of Students (1 FTE)	102,000			102,000
	Total 72210 - Regular Instruction Support	**102,000**	**-**	**-**	**102,000**
	Total Chattanooga Preparatory School	**149,875**	**11,075**	**(11,075)**	**149,875**
CGLA Montessori School					
141-2-101-8142-8-71100-542910-0000-0000-101	Instructional Supplies	28,851	2,126		30,977
141-2-101-8142-8-71100-547110-0000-0000-101	Software	29,000		(2,126)	26,874
141-2-101-8142-8-71100-559990-0000-0000-101	Charges: Educational Assistant (2 FTE)	74,452			74,452
	Total 71100 - Regular Instruction	**132,303**	**2,126**	**(2,126)**	**132,303**
141-2-101-8142-8-72130-559990-0000-0000-101	Parent Meeting Expense	2,183			2,183
	Total 72130 - Other Student Support	**2,183**	**-**	**-**	**2,183**
141-2-101-8142-8-72210-552410-0000-0000-101	Staff Development	5,000			5,000
	Total 72210 - Regular Instruction Support	**5,000**	**-**	**-**	**5,000**
	Total CGLA Montessori School	**139,486**	**2,126**	**(2,126)**	**139,486**
Brown Middle					
141-2-101-0035-2-71100-513450-PWOB-0000-101	Instructional Personnel-Interventionist/Tutor Part-Time (.5 FTE)	23,925			23,925
141-2-101-0035-2-71100-514090-0000-0000-101	Teacher Supplements	9,100			9,100
141-2-101-0035-2-71100-520110-0000-0000-101	Social Security	2,047			2,047
141-2-101-0035-2-71100-520410-0000-0000-101	Retirement	819			819
141-2-101-0035-2-71100-520710-0000-0000-101	Medical Insurance	500			500
141-2-101-0035-2-71100-521210-0000-0000-101	Medicare	479			479
141-2-101-0035-2-71100-547110-0000-0000-101	Software	864			864
141-2-101-0035-2-71100-542910-0000-0000-101	Instructional Supplies	41,274			41,274
	Total 71100 - Regular Instruction	**79,008**	**-**	**-**	**79,008**
141-2-101-0035-2-72130-547110-0000-0000-101	Software	2,136			2,136
141-2-101-0035-2-72130-549990-0000-0000-101	Supplies, Awards, Postage	500			500
141-2-101-0035-2-72130-559990-0000-0000-101	Charges: Parental Involvement	2,516			2,516
	Total 72130 - Other Student Support	**5,152**	**-**	**-**	**5,152**
141-2-101-0035-2-72210-552410-0000-0000-101	Staff Development	3,875			3,875
	Total 72210 - Regular Instruction Support	**3,875**	**-**	**-**	**3,875**
141-2-101-0035-2-72710-531410-0000-0000-101	Contracts w/ Public Carriers	10,000			10,000
	Total 72710 - Transportation	**10,000**	**-**	**-**	**10,000**
	Total Brown Middle	**98,035**	**-**	**-**	**98,035**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
East Ridge Middle					
141-2-101-0075-2-71100-514090-0000-0000-101	Teacher Supplements	24,086		(2,480)	21,606
141-2-101-0075-2-71100-516350-PBEN-0000-101	Educational Assistant - Behavior (.5 FTE)	16,225			16,225
141-2-101-0075-2-71100-518810-0000-0000-101	Bonus	1,000			1,000
141-2-101-0075-2-71100-518990-0000-0000-101	Other Salaries: Classified Extended Hours	2,000			2,000
141-2-101-0075-2-71100-520110-0000-0000-101	Social Security	2,684		(154)	2,530
141-2-101-0075-2-71100-520410-0000-0000-101	Retirement	4,994		(233)	4,761
141-2-101-0075-2-71100-520610-0000-0000-101	Life Insurance	20			20
141-2-101-0075-2-71100-520710-0000-0000-101	Medical Insurance	6,660			6,660
141-2-101-0075-2-71100-520810-0000-0000-101	Dental Insurance	147			147
141-2-101-0075-2-71100-521010-0000-0000-101	Unemployment Compensation	7			7
141-2-101-0075-2-71100-521210-0000-0000-101	Medicare	629		(36)	593
141-2-101-0075-2-71100-529910-0000-0000-101	Long Term Disability	54			54
141-2-101-0075-2-71100-529930-0000-0000-101	Short Term Disability	58			58
141-2-101-0075-2-71100-542910-0000-0000-101	Instructional Supplies	29,925			29,925
141-2-101-0075-2-71100-547110-0000-0000-101	Software	14,416			14,416
141-2-101-0075-2-71100-559990-0000-0000-101	Charges: Field Trips, etc	800			800
	Total 71100 - Regular Instruction	**103,705**	**-**	**(2,903)**	**100,802**
141-2-101-0075-2-72130-539990-0000-0000-101	Contracted Services - Parent	29,000			29,000
141-2-101-0075-2-72130-547110-0000-0000-101	Software	4,166	2,903		7,069
141-2-101-0075-2-72130-549990-0000-0000-101	Supplies, Awards, Postage	1,500			1,500
141-2-101-0075-2-72130-559990-0000-0000-101	Charges: Parental Involvement	2,650			2,650
	Total 72130 - Other Student Support	**37,316**	**2,903**	**-**	**40,219**
141-2-101-0075-2-72210-516210-0000-0000-101	Clerical Personnel	300			300
141-2-101-0075-2-72210-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0075-2-72210-5189E0-PBEN-0000-101	Dean of Students (1 FTE)	78,121			78,121
141-2-101-0075-2-72210-519610-0000-0000-101	In-Service Stipends	3,600			3,600
141-2-101-0075-2-72210-520110-0000-0000-101	Social Security	5,209			5,209
141-2-101-0075-2-72210-520410-0000-0000-101	Retirement	7,578			7,578
141-2-101-0075-2-72210-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0075-2-72210-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0075-2-72210-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0075-2-72210-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0075-2-72210-521210-0000-0000-101	Medicare	1,218			1,218
141-2-101-0075-2-72210-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0075-2-72210-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0075-2-72210-549990-0000-0000-101	Supplies & Materials-Staff Development	5,000			5,000
141-2-101-0075-2-72210-552410-0000-0000-101	Staff Development	5,395			5,395
	Total 72210 - Regular Instruction Support	**122,312**	**-**	**-**	**122,312**
141-2-101-0075-2-72710-531410-0000-0000-101	Contracts w/ Public Carriers	1,000			1,000
	Total 72710 - Transportation	**1,000**	**-**	**-**	**1,000**
	Total East Ridge Middle	**264,333**	**2,903**	**(2,903)**	**264,333**
Ooltewah Middle					
141-2-101-0157-2-71100-514090-0000-0000-101	Teacher Supplements	15,080			15,080
141-2-101-0157-2-71100-520110-0000-0000-101	Social Security	935			935
141-2-101-0157-2-71100-520410-0000-0000-101	Retirement	1,351			1,351
141-2-101-0157-2-71100-521210-0000-0000-101	Medicare	219			219
141-2-101-0157-2-71100-542910-0000-0000-101	Instructional Supplies	10,800		(5,506)	5,294
141-2-101-0157-2-71100-547110-0000-0000-101	Software	5,218			5,218
	Total 71100 - Regular Instruction	**33,603**	**-**	**(5,506)**	**28,097**
141-2-101-0157-2-72130-518990-0000-0000-101	Other Salaries	4,000	2,000		6,000
141-2-101-0157-2-72130-520110-0000-0000-101	Social Security	248	124		372
141-2-101-0157-2-72130-520410-0000-0000-101	Retirement	360	294		654
141-2-101-0157-2-72130-521210-0000-0000-101	Medicare	58	29		87
141-2-101-0157-2-72130-549990-0000-0000-101	Supplies, Awards, Postage	1,500			1,500
141-2-101-0157-2-72130-559990-0000-0000-101	Charges: Parental Involvement	2,000			2,000
	Total 72130 - Other Student Support	**8,166**	**2,447**	**-**	**10,613**
141-2-101-0157-2-72210-518810-0000-0000-101	Bonus	1,000			1,000
141-2-101-0157-2-72210-518990-0000-0000-101	Other Salary and Wages	-	2,500		2,500
141-2-101-0157-2-72210-5189E0-0000-0000-101	Dean (.5 FTE)	40,224			40,224
141-2-101-0157-2-72210-520110-0000-0000-101	Social Security	2,556	155		2,711
141-2-101-0157-2-72210-520410-0000-0000-101	Retirement	3,710	368		4,078
141-2-101-0157-2-72210-520610-0000-0000-101	Life Insurance	20			20
141-2-101-0157-2-72210-520710-0000-0000-101	Medical Insurance	6,660			6,660
141-2-101-0157-2-72210-520810-0000-0000-101	Dental Insurance	147			147
141-2-101-0157-2-72210-521010-0000-0000-101	Unemployment Compensation	7			7
141-2-101-0157-2-72210-521210-0000-0000-101	Medicare	598	36		634
141-2-101-0157-2-72210-529910-0000-0000-101	Long Term Disability	54			54
141-2-101-0157-2-72210-529930-0000-0000-101	Short Term Disability	58			58
	Total 72210 - Regular Instruction Support	**55,034**	**3,059**	**-**	**58,093**
141-2-101-0157-2-72710-531410-0000-0000-101	Contracts w/ Public Carriers	25,000			25,000
	Total 72710 - Transportation	**25,000**	**-**	**-**	**25,000**
	Total Ooltewah Middle	**121,803**	**5,506**	**(5,506)**	**121,803**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
Red Bank Middle					
141-2-101-0180-2-71100-5116H0-PBEN-0000-101	Teacher - Intervention (.7 FTE)	38,500			38,500
141-2-101-0180-2-71100-516350-PBEN-0000-101	Educational Assistant - Behavior (.7 FTE)	21,096			21,096
141-2-101-0180-2-71100-518810-0000-0000-101	Bonus	1,400			1,400
141-2-101-0180-2-71100-520110-0000-0000-101	Social Security	3,912			3,912
141-2-101-0180-2-71100-520410-0000-0000-101	Retirement	3,208			3,208
141-2-101-0180-2-71100-520610-0000-0000-101	Life Insurance	56			56
141-2-101-0180-2-71100-520710-0000-0000-101	Medical Insurance	18,648			18,648
141-2-101-0180-2-71100-520810-0000-0000-101	Dental Insurance	412			412
141-2-101-0180-2-71100-521010-0000-0000-101	Unemployment Compensation	20			20
141-2-101-0180-2-71100-521210-0000-0000-101	Medicare	915			915
141-2-101-0180-2-71100-529910-0000-0000-101	Long Term Disability	150			150
141-2-101-0180-2-71100-529930-0000-0000-101	Short Term Disability	162			162
141-2-101-0180-2-71100-542910-0000-0000-101	Instructional Supplies	13,000		(9,997)	3,003
	Total 71100 - Regular Instruction	**101,479**	**-**	**(9,997)**	**91,482**
141-2-101-0180-2-72130-518810-0000-0000-101	Bonus	1,400			1,400
141-2-101-0180-2-72130-5189B0-PBEN-0000-101	Truancy Specialist (.7 FTE)	36,160			36,160
141-2-101-0180-2-72130-520110-0000-0000-101	Social Security	2,329			2,329
141-2-101-0180-2-72130-520410-0000-0000-101	Retirement	5,048			5,048
141-2-101-0180-2-72130-520610-0000-0000-101	Life Insurance	28			28
141-2-101-0180-2-72130-520710-0000-0000-101	Medical Insurance	9,324			9,324
141-2-101-0180-2-72130-520810-0000-0000-101	Dental Insurance	206			206
141-2-101-0180-2-72130-521010-0000-0000-101	Unemployment Compensation	10			10
141-2-101-0180-2-72130-521210-0000-0000-101	Medicare	545			545
141-2-101-0180-2-72130-529910-0000-0000-101	Long Term Disability	75			75
141-2-101-0180-2-72130-529930-0000-0000-101	Short Term Disability	81			81
141-2-101-0180-2-72130-547110-0000-0000-101	Software	677		(677)	-
141-2-101-0180-2-72130-559990-0000-0000-101	Charges: Parental Involvement	3,614			3,614
	Total 72130 - Other Student Support	**59,497**	**-**	**(677)**	**58,820**
141-2-101-0180-2-72210-519610-0000-0000-101	In-Service Stipends	14,720	9,150		23,870
141-2-101-0180-2-72210-520110-0000-0000-101	Social Security	913	567		1,480
141-2-101-0180-2-72210-520410-0000-0000-101	Retirement	1,326	824		2,150
141-2-101-0180-2-72210-521210-0000-0000-101	Medicare	213	133		346
	Total 72210 - Regular Instruction Support	**17,172**	**10,674**	**-**	**27,846**
	Total Red Bank Middle	**178,148**	**10,674**	**(10,674)**	**178,148**
Howard Connect Academy					
141-2-101-0098-2-71100-514090-0000-0000-101	Teacher Supplements	4,200			4,200
141-2-101-0098-2-71100-520110-0000-0000-101	Social Security	260			260
141-2-101-0098-2-71100-520410-0000-0000-101	Retirement	378			378
141-2-101-0098-2-71100-521210-0000-0000-101	Medicare	61			61
141-2-101-0098-2-71100-542910-0000-0000-101	Instructional Supplies	3,025			3,025
141-2-101-0098-2-71100-547110-0000-0000-101	Software	5,000			5,000
	Total 71100 - Regular Instruction	**12,924**	**-**	**-**	**12,924**
141-2-101-0098-2-72130-549990-0000-0000-101	Supplies, Awards, Postage	500			500
141-2-101-0098-2-72130-559990-0000-0000-101	Charges: Parental Involvement	4,586			4,586
	Total 72130 - Other Student Support	**5,086**	**-**	**-**	**5,086**
141-2-101-0098-2-72210-519610-0000-0000-101	In-Service Stipends	1,500			1,500
141-2-101-0098-2-72210-520110-0000-0000-101	Social Security	93			93
141-2-101-0098-2-72210-520410-0000-0000-101	Retirement	135			135
141-2-101-0098-2-72210-521210-0000-0000-101	Medicare	22			22
	Total 72210 - Regular Instruction Support	**1,750**	**-**	**-**	**1,750**
	Total Howard Connect Academy	**19,760**	**-**	**-**	**19,760**
Dalewood Middle					
141-2-101-0055-2-71100-514090-0000-0000-101	Teacher Supplements	12,325	10,000		22,325
141-2-101-0055-2-71100-520110-0000-0000-101	Social Security	765	620		1,385
141-2-101-0055-2-71100-520410-0000-0000-101	Retirement	1,110	1,185		2,295
141-2-101-0055-2-71100-521210-0000-0000-101	Medicare	179	145		324
141-2-101-0055-2-71100-542910-0000-0000-101	Instructional Supplies	19,335		(15,950)	3,385
	Total 71100 - Regular Instruction	**33,714**	**11,950**	**(15,950)**	**29,714**
141-2-101-0055-2-71200-516340-PBEN-0000-101	Educational Assistant - ExEd (.28 FTE)	11,258			11,258
141-2-101-0055-2-71200-518810-0000-0000-101	Bonus	1,000			1,000
141-2-101-0055-2-71200-520110-0000-0000-101	Social Security	760			760
141-2-101-0055-2-71200-520410-0000-0000-101	Retirement	937			937
141-2-101-0055-2-71200-520610-0000-0000-101	Life Insurance	15			15
141-2-101-0055-2-71200-520710-0000-0000-101	Medical Insurance	5,139			5,139
141-2-101-0055-2-71200-520810-0000-0000-101	Dental Insurance	113			113
141-2-101-0055-2-71200-521010-0000-0000-101	Unemployment Compensation	5			5
141-2-101-0055-2-71200-521210-0000-0000-101	Medicare	150			150
141-2-101-0055-2-71200-529910-0000-0000-101	Long Term Disability	41			41
141-2-101-0055-2-71200-529930-0000-0000-101	Short Term Disability	45			45
	Total 71200 - Special Education Program	**19,463**	**-**	**-**	**19,463**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-0055-2-72130-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0055-2-72130-518970-PBEN-0000-101	Family Partnership Specialist (.78 FTE)	33,614			33,614
141-2-101-0055-2-72130-520110-0000-0000-101	Social Security	2,284			2,284
141-2-101-0055-2-72130-520410-0000-0000-101	Retirement	5,416			5,416
141-2-101-0055-2-72130-520610-0000-0000-101	Life Insurance	31			31
141-2-101-0055-2-72130-520710-0000-0000-101	Medical Insurance	10,390			10,390
141-2-101-0055-2-72130-520810-0000-0000-101	Dental Insurance	229			229
141-2-101-0055-2-72130-521010-0000-0000-101	Unemployment Compensation	11			11
141-2-101-0055-2-72130-521210-0000-0000-101	Medicare	534			534
141-2-101-0055-2-72130-529910-0000-0000-101	Long Term Disability	83			83
141-2-101-0055-2-72130-529930-0000-0000-101	Short Term Disability	90			90
141-2-101-0055-2-72130-547110-0000-0000-101	Software	2,473			2,473
	Total 72130 - Other Student Support	**57,155**	**-**	**-**	**57,155**
141-2-101-0055-2-72710-531410-0000-0000-101	Contracts w/ Public Carriers	-	4,000		4,000
	Total 72710 - Transportation	**-**	**4,000**	**-**	**4,000**
	Total Dalewood Middle	**110,332**	**15,950**	**(15,950)**	**110,332**
East Lake Academy					
141-2-101-0064-2-71100-5116A0-PBEN-0000-101	Teacher - Related Arts (1 FTE)	5,722			5,722
141-2-101-0064-2-71100-520110-0000-0000-101	Social Security	355			355
141-2-101-0064-2-71100-520410-0000-0000-101	Retirement	458			458
141-2-101-0064-2-71100-520610-0000-0000-101	Life Insurance	5			5
141-2-101-0064-2-71100-520710-0000-0000-101	Medical Insurance	1,525			1,525
141-2-101-0064-2-71100-520810-0000-0000-101	Dental Insurance	34			34
141-2-101-0064-2-71100-521010-0000-0000-101	Unemployment Compensation	2			2
141-2-101-0064-2-71100-521210-0000-0000-101	Medicare	83			83
141-2-101-0064-2-71100-529910-0000-0000-101	Long Term Disability	13			13
141-2-101-0064-2-71100-529930-0000-0000-101	Short Term Disability	14			14
141-2-101-0064-2-71100-542910-0000-0000-101	Instructional Supplies	33,206	7,012		40,218
141-2-101-0064-2-71100-547110-0000-0000-101	Software	21,618			21,618
	Total 71100 - Regular Instruction	**63,035**	**7,012**	**-**	**70,047**
141-2-101-0064-2-72130-518810-0000-0000-101	Bonus	4,000			4,000
141-2-101-0064-2-72130-518960-PBEN-0000-101	Parent Coordinator (1.75 FTE)	58,496			58,496
141-2-101-0064-2-72130-5189G0-PBEN-0000-101	Behavior Management Specialist	35,700		(9,658)	26,042
141-2-101-0064-2-72130-520110-0000-0000-101	Social Security	6,098		(598)	5,500
141-2-101-0064-2-72130-520410-0000-0000-101	Retirement	14,457		(3,258)	11,199
141-2-101-0064-2-72130-520610-0000-0000-101	Life Insurance	106		(5)	101
141-2-101-0064-2-72130-520710-0000-0000-101	Medical Insurance	34,753		(1,556)	33,197
141-2-101-0064-2-72130-520810-0000-0000-101	Dental Insurance	768		(35)	733
141-2-101-0064-2-72130-521010-0000-0000-101	Unemployment Compensation	37		(1)	36
141-2-101-0064-2-72130-521210-0000-0000-101	Medicare	1,427		(140)	1,287
141-2-101-0064-2-72130-529910-0000-0000-101	Long Term Disability	280		(12)	268
141-2-101-0064-2-72130-529930-0000-0000-101	Short Term Disability	303		(13)	290
141-2-101-0064-2-72130-547110-0000-0000-101	Software	4,033		(69)	3,964
	Total 72130 - Other Student Support	**160,458**	**-**	**(15,345)**	**145,113**
141-2-101-0064-2-72210-5140M0-0000-0000-101	Stipend - Multi-Classroom Lead	30,000			30,000
141-2-101-0064-2-72210-519610-0000-0000-101	In-Service Stipends	-	5,000		5,000
141-2-101-0064-2-72210-520110-0000-0000-101	Social Security	1,860	310		2,170
141-2-101-0064-2-72210-520410-0000-0000-101	Retirement	2,700	450		3,150
141-2-101-0064-2-72210-521210-0000-0000-101	Medicare	435	73		508
141-2-101-0064-2-72210-552410-0000-0000-101	Staff Development	5,000			5,000
	Total 72210 - Regular Instruction Support	**39,995**	**5,833**	**-**	**45,828**
141-2-101-0064-2-72710-531410-0000-0000-101	Contracts w/ Public Carriers	-	2,500		2,500
	Total 72710 - Transportation	**-**	**2,500**	**-**	**2,500**
	Total East Lake Academy	**263,488**	**15,345**	**(15,345)**	**263,488**
Hixson Middle					
141-2-101-0129-2-71100-514090-0000-0000-101	Teacher Supplements	8,000			8,000
141-2-101-0129-2-71100-520110-0000-0000-101	Social Security	496			496
141-2-101-0129-2-71100-520410-0000-0000-101	Retirement	720			720
141-2-101-0129-2-71100-521210-0000-0000-101	Medicare	116			116
141-2-101-0129-2-71100-539980-0000-0000-101	Contracted Substitutes	2,100			2,100
141-2-101-0129-2-71100-542910-0000-0000-101	Instructional Supplies	21,116	9,007		30,123
141-2-101-0129-2-71100-547110-0000-0000-101	Software	19,000		(10,174)	8,826
	Total 71100 - Regular Instruction	**51,548**	**9,007**	**(10,174)**	**50,381**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-0129-2-72130-513470-PBEN-0000-101	ENL Interpreter (1 FTE)	41,266			41,266
141-2-101-0129-2-72130-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0129-2-72130-520110-0000-0000-101	Social Security	2,683			2,683
141-2-101-0129-2-72130-520410-0000-0000-101	Retirement	6,360			6,360
141-2-101-0129-2-72130-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0129-2-72130-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0129-2-72130-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0129-2-72130-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0129-2-72130-521210-0000-0000-101	Medicare	627			627
141-2-101-0129-2-72130-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0129-2-72130-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0129-2-72130-559990-0000-0000-101	Charges: Parental Involvement	3,093			3,093
	Total 72130 - Other Student Support	**69,920**	**-**	**-**	**69,920**
141-2-101-0129-2-72210-519610-0000-0000-101	In-Service Stipends	-	1,000		1,000
141-2-101-0129-2-72210-520110-0000-0000-101	Social Security	-	62		62
141-2-101-0129-2-72210-520410-0000-0000-101	Retirement	-	90		90
141-2-101-0129-2-72210-521210-0000-0000-101	Medicare	-	15		15
141-2-101-0129-2-72210-552410-0000-0000-101	Staff Development	4,000			4,000
	Total 72210 - Regular Instruction Support	**4,000**	**1,167**	**-**	**5,167**
	Total Hixson Middle	**125,468**	**10,174**	**(10,174)**	**125,468**
Orchard Knob Middle					
141-2-101-0200-2-71100-514090-0000-0000-101	Teacher Supplements	11,950			11,950
141-2-101-0200-2-71100-520110-0000-0000-101	Social Security	741			741
141-2-101-0200-2-71100-520410-0000-0000-101	Retirement	1,075			1,075
141-2-101-0200-2-71100-521210-0000-0000-101	Medicare	173			173
141-2-101-0200-2-71100-542910-0000-0000-101	Instructional Supplies	6,875		(5,555)	1,320
141-2-101-0200-2-71100-547110-0000-0000-101	Software	-	8,000		8,000
	Total 71100 - Regular Instruction	**20,814**	**8,000**	**(5,555)**	**23,259**
141-2-101-0200-2-72130-512310-0000-0000-101	Guidance Personnel	-	800		800
141-2-101-0200-2-72130-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0200-2-72130-5189G0-PBEN-0000-101	Behavior Management Specialist (1 FTE)	43,240			43,240
141-2-101-0200-2-72130-520110-0000-0000-101	Social Security	2,805	50		2,855
141-2-101-0200-2-72130-520410-0000-0000-101	Retirement	3,573	118		3,691
141-2-101-0200-2-72130-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0200-2-72130-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0200-2-72130-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0200-2-72130-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0200-2-72130-521210-0000-0000-101	Medicare	656	12		668
141-2-101-0200-2-72130-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0200-2-72130-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0200-2-72130-559990-0000-0000-101	Charges: Parental Involvement	1,912			1,912
	Total 72130 - Other Student Support	**68,077**	**980**	**-**	**69,057**
141-2-101-0200-2-72210-5140M0-0000-0000-101	Stipend - Multi Classroom Lead	10,000			10,000
141-2-101-0200-2-72210-520110-0000-0000-101	Social Security	620			620
141-2-101-0200-2-72210-520410-0000-0000-101	Retirement	900			900
141-2-101-0200-2-72210-521210-0000-0000-101	Medicare	145			145
	Total 72210 - Regular Instruction Support	**11,665**	**-**	**-**	**11,665**
141-2-101-0200-2-72710-531410-0000-0000-101	Contracts w/ Public Carriers	19,000		(3,425)	15,575
	Total 72710 - Transportation	**19,000**	**-**	**(3,425)**	**15,575**
	Total Orchard Knob Middle	**119,556**	**8,980**	**(8,980)**	**119,556**
Soddy Daisy Middle					
141-2-101-0225-2-71100-514090-0000-0000-101	Teacher Supplements	3,400	2,200		5,600
141-2-101-0225-2-71100-516350-PBEN-0000-101	Educational Assistant - Behavior (1 FTE)	30,138			30,138
141-2-101-0225-2-71100-518810-0000-0000-101	Teacher Bonus	2,000			2,000
141-2-101-0225-2-71100-520110-0000-0000-101	Social Security	2,204	136		2,340
141-2-101-0225-2-71100-520410-0000-0000-101	Retirement	5,030	198		5,228
141-2-101-0225-2-71100-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0225-2-71100-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0225-2-71100-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0225-2-71100-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0225-2-71100-521210-0000-0000-101	Medicare	515	32		547
141-2-101-0225-2-71100-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0225-2-71100-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0225-2-71100-539980-0000-0000-101	Contract Substitutes	-	3,000		3,000
141-2-101-0225-2-71100-542910-0000-0000-101	Instructional Supplies	14,898		(8,667)	6,231
141-2-101-0225-2-71100-559990-0000-0000-101	Charges: Field Trips, etc	333		(333)	-
	Total 71100 - Regular Instruction	**72,409**	**5,566**	**(9,000)**	**68,975**
141-2-101-0225-2-72130-547110-0000-0000-101	Software	1,000			1,000
141-2-101-0225-2-72130-559990-0000-0000-101	Charges: Parental Involvement	1,981			1,981
	Total 72130 - Other Student Support	**2,981**	**-**	**-**	**2,981**
141-2-101-0225-2-72210-552410-0000-0000-101	Staff Development	4,966	2,034		7,000
	Total 72210 - Regular Instruction Support	**4,966**	**2,034**	**-**	**7,000**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-0225-2-72710-531410-0000-0000-101	Contracts w/ Public Carriers	-	1,400		1,400
	Total 72710 - Transportation	**-**	**1,400**	**-**	**1,400**
	Total Soddy Daisy Middle	**80,356**	**9,000**	**(9,000)**	**80,356**
Alpine Crest Elementary					
141-2-101-0010-1-71100-516310-PWOB-0000-101	Educational Assistant (.5 FTE)	21,240			21,240
141-2-101-0010-1-71100-520110-0000-0000-101	Social Security	1,317			1,317
141-2-101-0010-1-71100-520770-0000-0000-101	Medical Insurance - Part-time	525			525
141-2-101-0010-1-71100-521210-0000-0000-101	Medicare	308			308
141-2-101-0010-1-71100-539980-0000-0000-101	Contract Substitutes	-	2,000		2,000
141-2-101-0010-1-71100-542910-0000-0000-101	Instructional Supplies	8,375		(2,083)	6,292
	Total 71100 - Regular Instruction	**31,765**	**2,000**	**(2,083)**	**31,682**
141-2-101-0010-1-72130-5189G0-PWOB-0000-101	Behavior Management Specialist Part-time (.5 FTE)	27,621			27,621
141-2-101-0010-1-72130-520110-0000-0000-101	Social Security	1,713			1,713
141-2-101-0010-1-72130-520770-0000-0000-101	Medical - Part-time	525			525
141-2-101-0010-1-72130-521210-0000-0000-101	Medicare	401			401
141-2-101-0010-1-72130-539990-0000-0000-101	Contracted Services	1,000		(1,000)	-
141-2-101-0010-1-72130-547110-0000-0000-101	Software	4,725			4,725
141-2-101-0010-1-72130-559990-0000-0000-101	Charges: Parental Involvement	1,313	3,000		4,313
	Total 72130 - Other Student Support	**37,298**	**3,000**	**(1,000)**	**39,298**
141-2-101-0010-1-72210-519610-0000-0000-101	In-Service Stipends	-	500		500
141-2-101-0010-1-72210-520110-0000-0000-101	Social Security	-	31		31
141-2-101-0010-1-72210-520410-0000-0000-101	Retirement	-	45		45
141-2-101-0010-1-72210-521210-0000-0000-101	Employer Medicare	-	7		7
141-2-101-0010-1-72210-554210-0000-0000-101	Staff Development	5,372		(2,500)	2,872
	Total 72210 - Regular Instruction Support	**5,372**	**583**	**(2,500)**	**3,455**
	TOTAL	**74,435**	**5,583**	**(5,583)**	**74,435**
East Ridge Elementary					
141-2-101-0065-1-71100-513450-PWOB-0000-101	Other Instructional Personnel Interventionist/Tutor (2 FTE)	69,600			69,600
141-2-101-0065-1-71100-514090-0000-0000-101	Teacher Supplements	2,000			2,000
141-2-101-0065-1-71100-516310-PBEN-0000-101	Educational Assistants (2 FTE)	64,900			64,900
141-2-101-0065-1-71100-516350-PBEN-0000-101	Educational Assistants - Behavior (1 FTE)	34,100			34,100
141-2-101-0065-1-71100-518810-0000-0000-101	Bonus	6,000			6,000
141-2-101-0065-1-71100-520110-0000-0000-101	Social Security	10,949			10,949
141-2-101-0065-1-71100-520410-0000-0000-101	Retirement	15,615			15,615
141-2-101-0065-1-71100-520610-0000-0000-101	Life Insurance	120			120
141-2-101-0065-1-71100-520710-0000-0000-101	Medical Insurance	39,960			39,960
141-2-101-0065-1-71100-520770-0000-0000-101	Medical Insurance - Part-time	2,100			2,100
141-2-101-0065-1-71100-520810-0000-0000-101	Dental Insurance	882			882
141-2-101-0065-1-71100-521010-0000-0000-101	Unemployment Compensation	42			42
141-2-101-0065-1-71100-521210-0000-0000-101	Medicare	2,561			2,561
141-2-101-0065-1-71100-529910-0000-0000-101	Long Term Disability	321			321
141-2-101-0065-1-71100-529930-0000-0000-101	Short Term Disability	348			348
141-2-101-0065-1-71100-542910-0000-0000-101	Instructional Supplies	22,876			22,876
	Total 71100 - Regular Instruction	**272,374**	**-**	**-**	**272,374**
141-2-101-0065-1-71200-516340-PBEN-0000-101	Educational Assistant - ExEd (1 FTE)	34,100			34,100
141-2-101-0065-1-71200-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0065-1-71200-520110-0000-0000-101	Social Security	2,238			2,238
141-2-101-0065-1-71200-520410-0000-0000-101	Retirement	5,307			5,307
141-2-101-0065-1-71200-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0065-1-71200-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0065-1-71200-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0065-1-71200-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0065-1-71200-521210-0000-0000-101	Medicare	523			523
141-2-101-0065-1-71200-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0065-1-71200-529930-0000-0000-101	Short Term Disability	116			116
	Total 71200 - Special Education Program	**58,059**	**-**	**-**	**58,059**
141-2-101-0065-1-72130-539990-0000-0000-101	Contracted Services	29,000			29,000
141-2-101-0065-1-72130-549990-0000-0000-101	Supplies, Awards, Postage	2,000			2,000
141-2-101-0065-1-72130-559990-0000-0000-101	Charges: Parental Involvement	4,068			4,068
	Total 72130 - Other Student Support	**35,068**	**-**	**-**	**35,068**
141-2-101-0065-1-72210-519610-0000-0000-101	In-Service Stipends	500			500
141-2-101-0065-1-72210-520110-0000-0000-101	Social Security	31			31
141-2-101-0065-1-72210-520410-0000-0000-101	Retirement	45			45
141-2-101-0065-1-72210-521210-0000-0000-101	Medicare	7			7
	Total 72210 - Regular Instruction Support	**583**	**-**	**-**	**583**
	Total East Ridge Elementary	**366,084**	**-**	**-**	**366,084**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
Middle Valley Elementary					
141-2-101-0085-1-71100-513450-PWOB-0000-101	Other Instructional Personnel Interventionist/Tutor Part-time (1 FTE)	28,800			28,800
141-2-101-0085-1-71100-520110-0000-0000-101	Social Security	1,786			1,786
141-2-101-0085-1-71100-520770-0000-0000-101	Medical Insurance - Part-time	1,050			1,050
141-2-101-0085-1-71100-521210-0000-0000-101	Medicare	418			418
141-2-101-0085-1-71100-539980-0000-0000-101	Contracted Substitutes	5,900			5,900
141-2-101-0085-1-71100-542910-0000-0000-101	Instructional Supplies	14,601			14,601
141-2-101-0085-1-71100-547110-0000-0000-101	Software	2,000		(2,000)	-
141-2-101-0085-1-71100-559990-0000-0000-101	Other Charges	8,000	2,000		10,000
	Total 71100 - Regular Instruction	**62,555**	**2,000**	**(2,000)**	**62,555**
141-2-101-0085-1-72130-518990-0000-0000-101	Other Salaries and Wages	1,250			1,250
141-2-101-0085-1-72130-520110-0000-0000-101	Social Security	78			78
141-2-101-0085-1-72130-520410-0000-0000-101	Retirement	184			184
141-2-101-0085-1-72130-521210-0000-0000-101	Medicare	18			18
141-2-101-0085-1-72130-547110-0000-0000-101	Software	2,100			2,100
141-2-101-0085-1-72130-549990-0000-0000-101	Supplies, Awards, Postage	1,500			1,500
141-2-101-0085-1-72130-559990-0000-0000-101	Training materials, mtg exp.	5,000			5,000
	Total 72130 - Other Student Support	**10,130**	**-**	**-**	**10,130**
141-2-101-0085-1-72210-516210-0000-0000-101	Classified Extended Contracts/Overtime	1,250			1,250
141-2-101-0085-1-72210-519610-0000-0000-101	In-Service Stipends	11,700			11,700
141-2-101-0085-1-72210-520110-0000-0000-101	Social Security	803			803
141-2-101-0085-1-72210-520410-0000-0000-101	Retirement	1,235			1,235
141-2-101-0085-1-72210-521210-0000-0000-101	Medicare	188			188
141-2-101-0085-1-72210-552410-0000-0000-101	Staff Development	25,250			25,250
	Total 72210 - Regular Instruction Support	**40,426**	**-**	**-**	**40,426**
141-2-101-0085-1-72710-531410-0000-0000-101	Contracts w/ Public Carriers	7,000			7,000
	Total 72710 - Transportation	**7,000**	**-**	**-**	**7,000**
	Total Middle Valley Elementary	**120,111**	**2,000**	**(2,000)**	**120,111**
Harrison Elementary					
141-2-101-0090-1-71100-513450-PBEN-0000-101	Other Instructional Personnel Interventionist/Tutor (2 FTE)	59,100			59,100
141-2-101-0090-1-71100-516310-PBEN-0000-101	Educational Assistant (2 FTE)	68,067			68,067
141-2-101-0090-1-71100-518810-0000-0000-101	Bonus	8,000			8,000
141-2-101-0090-1-71100-520110-0000-0000-101	Social Security	8,380			8,380
141-2-101-0090-1-71100-520410-0000-0000-101	Retirement	19,870			19,870
141-2-101-0090-1-71100-520610-0000-0000-101	Life Insurance	160			160
141-2-101-0090-1-71100-520710-0000-0000-101	Medical Insurance	53,280			53,280
141-2-101-0090-1-71100-520810-0000-0000-101	Dental Insurance	1,176			1,176
141-2-101-0090-1-71100-521010-0000-0000-101	Unemployment Compensation	56			56
141-2-101-0090-1-71100-521210-0000-0000-101	Medicare	1,960			1,960
141-2-101-0090-1-71100-529910-0000-0000-101	Long Term Disability	428			428
141-2-101-0090-1-71100-529930-0000-0000-101	Short Term Disability	464			464
141-2-101-0090-1-71100-542910-0000-0000-101	Instructional Supplies	32,225			32,225
	Total 71100 - Regular Instruction	**253,166**	**-**	**-**	**253,166**
141-2-101-0090-1-72130-559990-0000-0000-101	Training materials, mtg exp.	4,789			4,789
	Total 72130 - Other Student Support	**4,789**	**-**	**-**	**4,789**
141-2-101-0090-1-72210-552410-0000-0000-101	Staff Development	6,330			6,330
	Total 72210 - Regular Instruction Support	**6,330**	**-**	**-**	**6,330**
	Total Harrison Elementary	**264,285**	**-**	**-**	**264,285**
Wolftever Creek Elementary					
141-2-101-0148-1-71100-513450-PWOB-0000-101	Other Instruction Personnel Interventionists/Tutors Part-Time (1.5 F	62,540			62,540
141-2-101-0148-1-71100-520110-0000-0000-101	Social Security	3,877			3,877
141-2-101-0148-1-71100-520770-0000-0000-101	Medical Insurance - Part-time	1,575			1,575
141-2-101-0148-1-71100-521210-0000-0000-101	Medicare	907			907
141-2-101-0148-1-71100-542910-0000-0000-101	Instructional Supplies	17,475	3,353		20,828
	Total 71100 - Regular Instruction	**86,374**	**3,353**	**-**	**89,727**
141-2-101-0148-1-72130-518960-PBEN-0000-101	Parent Volunteer Coordinator	26,870			26,870
141-2-101-0148-1-72130-520110-0000-0000-101	Social Security	1,666			1,666
141-2-101-0148-1-72130-520410-0000-0000-101	Retirement	3,950			3,950
141-2-101-0148-1-72130-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0148-1-72130-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0148-1-72130-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0148-1-72130-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0148-1-72130-521210-0000-0000-101	Medicare	390			390
141-2-101-0148-1-72130-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0148-1-72130-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0148-1-72130-559990-0000-0000-101	Charges: Parental Involvement	3,353		(3,353)	-
	Total 72130 - Other Student Support	**50,120**	**-**	**(3,353)**	**46,767**
141-2-101-0148-1-72710-531410-0000-0000-101	Contracts w/ Public Carriers	4,200			4,200
	Total 72710 - Transportation	**4,200**	**-**	**-**	**4,200**
	Total Wolftever Creek Elementary	**140,694**	**3,353**	**(3,353)**	**140,694**
Red Bank Elementary					

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-0171-1-71100-513450-PWOB-0000-101	Other Instruction Personnel Interventionists/Tutors Part-Time (1 FTE	28,800			28,800
141-2-101-0171-1-71100-516350-PBEN-0000-101	Educational Assistants - Behavior (2 FTE)	60,270			60,270
141-2-101-0171-1-71100-518810-0000-0000-101	Bonus	4,000			4,000
141-2-101-0171-1-71100-520110-0000-0000-101	Social Security	5,770			5,770
141-2-101-0171-1-71100-520410-0000-0000-101	Retirement	7,294			7,294
141-2-101-0171-1-71100-520610-0000-0000-101	Life Insurance	80			80
141-2-101-0171-1-71100-520710-0000-0000-101	Medical Insurance	26,640			26,640
141-2-101-0171-1-71100-520770-0000-0000-101	Medical Insurance - Part-time	1,050			1,050
141-2-101-0171-1-71100-520810-0000-0000-101	Dental Insurance	588			588
141-2-101-0171-1-71100-521010-0000-0000-101	Unemployment Compensation	28			28
141-2-101-0171-1-71100-521210-0000-0000-101	Medicare	1,350			1,350
141-2-101-0171-1-71100-529910-0000-0000-101	Long Term Disability	214			214
141-2-101-0171-1-71100-529930-0000-0000-101	Short Term Disability	232			232
141-2-101-0171-1-71100-542910-0000-0000-101	Instructional Supplies	12,550		(7,550)	5,000
	Total 71100 - Regular Instruction	**148,866**	**-**	**(7,550)**	**141,316**
141-2-101-0171-1-72130-559990-0000-0000-101	Charges: Parental Involvement	3,489			3,489
	Total 72130 - Other Student Support	**3,489**	**-**	**-**	**3,489**
141-2-101-0171-1-72210-552410-0000-0000-101	Staff Development	6,266	7,550		13,816
	Total 72210 - Regular Instruction Support	**6,266**	**7,550**	**-**	**13,816**
	Total Red Bank Elementary	**158,621**	**7,550**	**(7,550)**	**158,621**
Spring Creek Elementary					
141-2-101-0235-1-71100-513450-PWOB-0000-101	Other Instructional Personnel Interventionists/Tutors Part-Time (1 FT	37,500			37,500
141-2-101-0235-1-71100-516310-PBEN-0000-101	Educational Assistants (4 FTE)	118,481			118,481
141-2-101-0235-1-71100-518810-0000-0000-101	Bonus	8,000		(4,000)	4,000
141-2-101-0235-1-71100-520110-0000-0000-101	Social Security	10,167		(248)	9,919
141-2-101-0235-1-71100-520410-0000-0000-101	Retirement	18,592		(306)	18,286
141-2-101-0235-1-71100-520610-0000-0000-101	Life Insurance	160			160
141-2-101-0235-1-71100-520710-0000-0000-101	Medical Insurance	53,280			53,280
141-2-101-0235-1-71100-520770-0000-0000-101	Medical Insurance - Part-time	1,050			1,050
141-2-101-0235-1-71100-520810-0000-0000-101	Dental Insurance	1,176			1,176
141-2-101-0235-1-71100-521010-0000-0000-101	Unemployment Compensation	56			56
141-2-101-0235-1-71100-521210-0000-0000-101	Medicare	2,378		(58)	2,320
141-2-101-0235-1-71100-529910-0000-0000-101	Long Term Disability	428			428
141-2-101-0235-1-71100-529930-0000-0000-101	Short Term Disability	464			464
141-2-101-0235-1-71100-542910-0000-0000-101	Instructional Supplies	17,650			17,650
	Total 71100 - Regular Instruction	**269,382**	**-**	**(4,612)**	**264,770**
141-2-101-0235-1-72130-539990-0000-0000-101	Contracted Services	30,554			30,554
141-2-101-0235-1-72130-547110-0000-0000-101	Software	500			500
141-2-101-0235-1-72130-549990-0000-0000-101	Supplies, Awards, Postage	1,000			1,000
141-2-101-0235-1-72130-559990-0000-0000-101	Charges: Parental Involvement	1,575			1,575
	Total 72130 - Other Student Support	**33,629**	**-**	**-**	**33,629**
141-2-101-0235-1-72210-519610-0000-0000-101	In-Service Stipends	1,500			1,500
141-2-101-0235-1-72210-520110-0000-0000-101	Social Security	93			93
141-2-101-0235-1-72210-520410-0000-0000-101	Retirement	135			135
141-2-101-0235-1-72210-521210-0000-0000-101	Medicare	22			22
	Total 72210 - Regular Instruction Support	**1,750**	**-**	**-**	**1,750**
141-2-101-0235-1-72710-531410-0000-0000-101	Contracts w/ Public Carriers	2,926	4,612		7,538
	Total 72710 - Transportation	**2,926**	**4,612**	**-**	**7,538**
	Total Spring Creek Elementary	**307,687**	**4,612**	**(4,612)**	**307,687**
Barger Academy					
141-2-101-0097-1-71100-513450-PWOB-0000-101	Instruction Personnel Interventionist/Tutor Part-time (1.5 FTE)	53,940			53,940
141-2-101-0097-1-71100-520110-0000-0000-101	Social Security	3,344			3,344
141-2-101-0097-1-71100-520770-0000-0000-101	Medical Insurance - Part-time	1,575			1,575
141-2-101-0097-1-71100-521210-0000-0000-101	Medicare	782			782
141-2-101-0097-1-71100-542910-0000-0000-101	Instructional Supplies	13,690		(4,000)	9,690
	Total 71100 - Regular Instruction	**73,331**	**-**	**(4,000)**	**69,331**
141-2-101-0097-1-72130-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0097-1-72130-518960-PWOB-0000-101	Parent Coordinator Part-Time (.5 FTE)	21,111			21,111
141-2-101-0097-1-72130-5189G0-0000-0000-101	Behavior Management Specialist (1 FTE)	44,765			44,765
141-2-101-0097-1-72130-520110-0000-0000-101	Social Security	4,208			4,208
141-2-101-0097-1-72130-520410-0000-0000-101	Retirement	6,874			6,874
141-2-101-0097-1-72130-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0097-1-72130-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0097-1-72130-520770-0000-0000-101	Medical Insurance - Part-time	525			525
141-2-101-0097-1-72130-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0097-1-72130-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0097-1-72130-521210-0000-0000-101	Medicare	984			984
141-2-101-0097-1-72130-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0097-1-72130-529930-0000-0000-101	Short Term Disability	116			116
	Total 72130 - Other Student Support	**94,358**	**-**	**-**	**94,358**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-0097-1-72710-531410-0000-0000-101	Contracts w/ Public Carriers	-	4,000		4,000
	Total 72710 - Transportation	**-**	**4,000**	**-**	**4,000**
	Total Barger Academy	**167,689**	**4,000**	**(4,000)**	**167,689**
Clifton Hills Elementary					
141-2-101-0048-1-71100-5116A0-PBEN-0000-101	Teacher - Related Arts (1 FTE)	56,749			56,749
141-2-101-0048-1-71100-520110-0000-0000-101	Social Security	3,518			3,518
141-2-101-0048-1-71100-520410-0000-0000-101	Retirement	5,107			5,107
141-2-101-0048-1-71100-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0048-1-71100-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0048-1-71100-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0048-1-71100-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0048-1-71100-521210-0000-0000-101	Medicare	823			823
141-2-101-0048-1-71100-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0048-1-71100-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0048-1-71100-539990-0000-0000-101	Contracted Services	5,500			5,500
141-2-101-0048-1-71100-542910-0000-0000-101	Instructional Supplies	47,656			47,656
141-2-101-0048-1-71100-559990-0000-0000-101	Charges: Field Trips, etc	14,000			14,000
	Total 71100 - Regular Instruction	**147,244**	**-**	**-**	**147,244**
141-2-101-0048-1-72130-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0048-1-72130-5189B0-PBEN-0000-101	Truancy Specialist (1 FTE)	55,481			55,481
141-2-101-0048-1-72130-520110-0000-0000-101	Social Security	3,564			3,564
141-2-101-0048-1-72130-520410-0000-0000-101	Retirement	8,450			8,450
141-2-101-0048-1-72130-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0048-1-72130-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0048-1-72130-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0048-1-72130-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0048-1-72130-521210-0000-0000-101	Medicare	833			833
141-2-101-0048-1-72130-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0048-1-72130-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0048-1-72130-547110-0000-0000-101	Software	4,629			4,629
	Total 72130 - Other Student Support	**88,848**	**-**	**-**	**88,848**
141-2-101-0048-1-72210-5140M0-0000-0000-101	Stipend Multi-Classroom Lead	10,000			10,000
141-2-101-0048-1-72210-517210-PBEN-0000-101	Instructional Coach (.5 FTE)	33,397			33,397
141-2-101-0048-1-72210-518810-0000-0000-101	Instructional Support Bonuses	1,000			1,000
141-2-101-0048-1-72210-519610-0000-0000-101	In-Service Stipends	10,000			10,000
141-2-101-0048-1-72210-520110-0000-0000-101	Social Security	3,373			3,373
141-2-101-0048-1-72210-520410-0000-0000-101	Retirement	4,896			4,896
141-2-101-0048-1-72210-520610-0000-0000-101	Life Insurance	20			20
141-2-101-0048-1-72210-520710-0000-0000-101	Health Insurance	6,660			6,660
141-2-101-0048-1-72210-520810-0000-0000-101	Dental Insurance	147			147
141-2-101-0048-1-72210-521010-0000-0000-101	Unemployment Compensation	7			7
141-2-101-0048-1-72210-521210-0000-0000-101	Medicare	789			789
141-2-101-0048-1-72210-529910-0000-0000-101	Long Term Disability	54			54
141-2-101-0048-1-72210-529930-0000-0000-101	Short Term Disability	58			58
141-2-101-0048-1-72210-552410-0000-0000-101	Staff Development	7,970			7,970
	Total 72210 - Regular Instruction Support	**78,371**	**-**	**-**	**78,371**
141-2-101-0048-1-72710-531410-0000-0000-101	Contracts w/ Public Carriers	5,500			5,500
	Total 72710 - Transportation	**5,500**	**-**	**-**	**5,500**
	Total Clifton Hills Elementary	**319,963**	**-**	**-**	**319,963**
Donaldson Elementary					
141-2-101-0037-1-71100-513450-PBEN-0000-101	Other Instructional Personnel Interventionists/Tutors (1 FTE)	29,550			29,550
141-2-101-0037-1-71100-516310-0000-0000-101	Educational Assistant (1.5 FTE)	29,288			29,288
141-2-101-0037-1-71100-518810-0000-0000-101	Teacher Bonuses	4,000			4,000
141-2-101-0037-1-71100-520110-0000-0000-101	Social Security	3,896			3,896
141-2-101-0037-1-71100-520410-0000-0000-101	Retirement	9,238			9,238
141-2-101-0037-1-71100-520610-0000-0000-101	Life Insurance	80			80
141-2-101-0037-1-71100-520710-0000-0000-101	Medical Insurance	26,640			26,640
141-2-101-0037-1-71100-520810-0000-0000-101	Dental Insurance	588			588
141-2-101-0037-1-71100-521010-0000-0000-101	Unemployment Compensation	28			28
141-2-101-0037-1-71100-521210-0000-0000-101	Medicare	912			912
141-2-101-0037-1-71100-529910-0000-0000-101	Long Term Disability	214			214
141-2-101-0037-1-71100-529930-0000-0000-101	Short Term Disability	232			232
141-2-101-0037-1-71100-539990-0000-0000-101	Contracted Services	5,500			5,500
141-2-101-0037-1-71100-542910-0000-0000-101	Instructional Supplies	18,071		(12,133)	5,938
141-2-101-0037-1-71100-547110-0000-0000-101	Software	-	6,300		6,300
141-2-101-0037-1-71100-559900-0000-0000-101	Other Charges	1,000			1,000
	Total 71100 - Regular Instruction	**129,237**	**6,300**	**(12,133)**	**123,404**
141-2-101-0037-1-72130-549990-0000-0000-101	Supplies, Awards, Postage	-	120		120
141-2-101-0037-1-72130-559990-0000-0000-101	Charges: Parental Involvement	2,502		(120)	2,382
	Total 72130 - Other Student Support	**2,502**	**120**	**(120)**	**2,502**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-0037-1-72210-519610-0000-0000-101	In-Service Stipends	7,500	5,000		12,500
141-2-101-0037-1-72210-520110-0000-0000-101	Social Security	465	310		775
141-2-101-0037-1-72210-520410-0000-0000-101	Retirement	675	450		1,125
141-2-101-0037-1-72210-521210-0000-0000-101	Medicare	109	73		182
141-2-101-0037-1-72210-552410-0000-0000-101	Staff Development	10,190			10,190
	Total 72210 - Regular Instruction Support	**18,939**	**5,833**	**-**	**24,772**
141-2-101-0037-1-72710-531410-0000-0000-101	Contracts w/ Public Carriers	1,500			1,500
		1,500	**-**	**-**	**1,500**
	Total Donaldson Elementary	**152,178**	**12,253**	**(12,253)**	**152,178**
Daisy Elementary					
141-2-101-0050-1-71100-516310-PBEN-0000-101	Educational Assistant (1 FTE)	32,450			32,450
141-2-101-0050-1-71100-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0050-1-71100-520110-0000-0000-101	Social Security	2,136			2,136
141-2-101-0050-1-71100-520410-0000-0000-101	Retirement	5,064			5,064
141-2-101-0050-1-71100-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0050-1-71100-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0050-1-71100-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0050-1-71100-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0050-1-71100-521210-0000-0000-101	Medicare	500			500
141-2-101-0050-1-71100-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0050-1-71100-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0050-1-71100-539980-0000-0000-101	Contract Substitutes	-	3,600		3,600
141-2-101-0050-1-71100-542910-0000-0000-101	Instructional Supplies	6,550		(3,600)	2,950
	Total 71100 - Regular Instruction	**62,591**	**3,600**	**(3,600)**	**62,591**
141-2-101-0050-1-72130-518990-0000-0000-101	Other Salaries and Wages	2,500			2,500
141-2-101-0050-1-72130-520110-0000-0000-101	Social Security	155			155
141-2-101-0050-1-72130-520410-0000-0000-101	Retirement	368			368
141-2-101-0050-1-72130-521210-0000-0000-101	Medicare	36			36
141-2-101-0050-1-72130-559990-0000-0000-101	Charges: Parental Involvement	5,002			5,002
	Total 72130 - Other Student Support	**8,061**	**-**	**-**	**8,061**
141-2-101-0050-1-72210-519610-0000-0000-101	In-Service Stipends	2,760			2,760
141-2-101-0050-1-72210-520110-0000-0000-101	Social Security	171			171
141-2-101-0050-1-72210-520410-0000-0000-101	Retirement	248			248
141-2-101-0050-1-72210-521210-0000-0000-101	Medicare	40			40
	Total 72210 - Regular Instruction Support	**3,219**	**-**	**-**	**3,219**
	Total Daisy Elementary	**73,871**	**3,600**	**(3,600)**	**73,871**
Dupont Elementary					
141-2-101-0058-1-71100-513450-PWOB-0000-101	Instruction Personnel Interventionist/Tutor Part-Time (1.5 FTE)	57,420			57,420
141-2-101-0058-1-71100-520110-0000-0000-101	Social Security	3,560			3,560
141-2-101-0058-1-71100-520770-0000-0000-101	Medical Insurance - Part-time	1,313			1,313
141-2-101-0058-1-71100-521210-0000-0000-101	Medicare	832			832
141-2-101-0058-1-71100-539980-0000-0000-101	Contract Substitutes	2,333			2,333
141-2-101-0058-1-71100-542910-0000-0000-101	Instructional Supplies	13,182			13,182
	Total 71100 - Regular Instruction	**78,640**	**-**	**-**	**78,640**
141-2-101-0058-1-72130-539990-0000-0000-101	Other Contracted Services	1,200		(600)	600
141-2-101-0058-1-72130-549990-0000-0000-101	Supplies, Awards, Postage	-	600		600
141-2-101-0058-1-72130-559990-0000-0000-101	Charges: Parental Involvement	594			594
	Total 72130 - Other Student Support	**1,794**	**600**	**(600)**	**1,794**
141-2-101-0058-1-72210-519610-0000-0000-101	In-Service Stipends	10,500			10,500
141-2-101-0058-1-72210-520110-0000-0000-101	Social Security	651			651
141-2-101-0058-1-72210-520410-0000-0000-101	Retirement	945			945
141-2-101-0058-1-72210-521210-0000-0000-101	Medicare	152			152
141-2-101-0058-1-72210-552410-0000-0000-101	Staff Development	8,000			8,000
	Total 72210 - Regular Instruction Support	**20,248**	**-**	**-**	**20,248**
141-2-101-0058-1-72710-531410-0000-0000-101	Contracts w/ Public Carriers	3,600			3,600
	Total 72710 - Transportation	**3,600**	**-**	**-**	**3,600**
	Total Dupont Elementary	**104,282**	**600**	**(600)**	**104,282**
East Brainerd Elementary					
141-2-101-0062-1-71100-514090-0000-0000-101	Teacher Supplements	6,200	6,000		12,200
141-2-101-0062-1-71100-520110-0000-0000-101	Social Security	384	372		756
141-2-101-0062-1-71100-520410-0000-0000-101	Retirement	558	540		1,098
141-2-101-0062-1-71100-521210-0000-0000-101	Medicare	90	87		177
141-2-101-0062-1-71100-542910-0000-0000-101	Instructional Supplies	25,451		(6,919)	18,532
141-2-101-0062-1-71100-547110-0000-0000-101	Software	4,400			4,400
	Total 71100 - Regular Instruction	**37,083**	**6,999**	**(6,919)**	**37,163**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-0062-1-71200-516340-PBEN-0000-101	Educational Assistant - ExEd (3 FTE)	87,400			87,400
141-2-101-0062-1-71200-518810-0000-0000-101	Bonus	6,000		(2,000)	4,000
141-2-101-0062-1-71200-520110-0000-0000-101	Social Security	5,791		(124)	5,667
141-2-101-0062-1-71200-520410-0000-0000-101	Retirement	13,731		(294)	13,437
141-2-101-0062-1-71200-520610-0000-0000-101	Life Insurance	120			120
141-2-101-0062-1-71200-520710-0000-0000-101	Medical Insurance	39,960			39,960
141-2-101-0062-1-71200-520810-0000-0000-101	Dental Insurance	882			882
141-2-101-0062-1-71200-521010-0000-0000-101	Unemployment Compensation	42			42
141-2-101-0062-1-71200-521210-0000-0000-101	Medicare	1,355		(29)	1,326
141-2-101-0062-1-71200-529910-0000-0000-101	Long Term Disability	321			321
141-2-101-0062-1-71200-529930-0000-0000-101	Short Term Disability	348			348
	Total 71200 - Special Education Instruction	**155,950**	**-**	**(2,447)**	**153,503**
141-2-101-0062-1-72130-549990-0000-0000-101	Other Supplies and Materials	2,400			2,400
141-2-101-0062-1-72130-559990-0000-0000-101	Charges: Parental Involvement	3,571			3,571
	Total 72130 - Other Student Support	**5,971**	**-**	**-**	**5,971**
141-2-101-0062-1-72210-5140M0-0000-0000-101	Stipend - Multi-Classroom Lead	30,000			30,000
141-2-101-0062-1-72210-519610-0000-0000-101	In-Service Stipends	-	1,000		1,000
141-2-101-0062-1-72210-520110-0000-0000-101	Social Security	1,860	62		1,922
141-2-101-0062-1-72210-520410-0000-0000-101	Retirement	2,700	90		2,790
141-2-101-0062-1-72210-521210-0000-0000-101	Medicare	435	15		450
	Total 72210 - Regular Instruction Support	**34,995**	**1,167**	**-**	**36,162**
141-2-101-0062-1-72710-531410-0000-0000-101	Contracts w/ Public Carriers	8,197	1,200		9,397
	Total 72710 - Transportation	**8,197**	**1,200**	**-**	**9,397**
	Total East Brainerd Elementary	**242,196**	**9,366**	**(9,366)**	**242,196**
East Lake Elementary					
141-2-101-0063-1-71100-514090-0000-0000-101	Teacher Supplements	23,000			23,000
141-2-101-0063-1-71100-516310-PBEN-0000-101	Educational Assistant (2 FTE)	56,711			56,711
141-2-101-0063-1-71100-518810-0000-0000-101	Bonus	4,000		(2,000)	2,000
141-2-101-0063-1-71100-520110-0000-0000-101	Social Security	5,190		(124)	5,066
141-2-101-0063-1-71100-520410-0000-0000-101	Retirement	10,994		(294)	10,700
141-2-101-0063-1-71100-520610-0000-0000-101	Life Insurance	80			80
141-2-101-0063-1-71100-520710-0000-0000-101	Medical Insurance	26,640			26,640
141-2-101-0063-1-71100-520810-0000-0000-101	Dental Insurance	588			588
141-2-101-0063-1-71100-521010-0000-0000-101	Unemployment Compensation	28			28
141-2-101-0063-1-71100-521210-0000-0000-101	Medicare	1,214		(29)	1,185
141-2-101-0063-1-71100-529910-0000-0000-101	Long Term Disability	214			214
141-2-101-0063-1-71100-529930-0000-0000-101	Short Term Disability	232			232
141-2-101-0063-1-71100-542910-0000-0000-101	Instructional Supplies	49,377		(11,000)	38,377
141-2-101-0063-1-71100-547110-0000-0000-101	Software	-	5,000		5,000
141-2-101-0063-1-71100-559990-0000-0000-101	Charges: Field Trips, etc	30,000			30,000
	Total 71100 - Regular Instruction	**208,268**	**5,000**	**(13,447)**	**199,821**
141-2-101-0063-1-72130-547110-0000-0000-101	Software	7,000			7,000
	Total 72130 - Other Student Support	**7,000**	**-**	**-**	**7,000**
141-2-101-0063-1-72210-517210-0000-0000-101	Instructional Coach	7,500			7,500
141-2-101-0063-1-72210-5189E0-0000-0000-101	Dean	3,800			3,800
141-2-101-0063-1-72210-519610-0000-0000-101	In-Service Stipends	31,571			31,571
141-2-101-0063-1-72210-520110-0000-0000-101	Social Security	2,659			2,659
141-2-101-0063-1-72210-520410-0000-0000-101	Retirement	3,858			3,858
141-2-101-0063-1-72210-521210-0000-0000-101	Medicare	622			622
141-2-101-0063-1-72210-552410-0000-0000-101	Staff Development	5,500	3,447		8,947
	Total 72210 - Regular Instruction Support	**55,510**	**3,447**	**-**	**58,957**
141-2-101-0063-1-72710-531410-0000-0000-101	Contracts w/ Public Carriers	25,000	5,000		30,000
	Total 72710 - Transportation	**25,000**	**5,000**	**-**	**30,000**
	Total East Lake Elementary	**295,778**	**13,447**	**(13,447)**	**295,778**
East Side Elementary					
141-2-101-0078-1-71100-516310-PBEN-0000-101	Educational Assistants (1 FTE)	49,324			49,324
141-2-101-0078-1-71100-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0078-1-71100-520110-0000-0000-101	Social Security	3,182			3,182
141-2-101-0078-1-71100-520410-0000-0000-101	Retirement	7,545			7,545
141-2-101-0078-1-71100-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0078-1-71100-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0078-1-71100-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0078-1-71100-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0078-1-71100-521210-0000-0000-101	Medicare	744			744
141-2-101-0078-1-71100-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0078-1-71100-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0078-1-71100-542910-0000-0000-101	Instructional Supplies	34,368			34,368
141-2-101-0078-1-71100-547110-0000-0000-101	Software	11,316			11,316
	Total 71100 - Regular Instruction	**122,370**	**-**	**-**	**122,370**
141-2-101-0078-1-72130-549990-0000-0000-101	Supplies, Awards, Postage	3,000			3,000
141-2-101-0078-1-72130-559990-0000-0000-101	Charges: Parental Involvement	670			670
	Total 72130 - Other Student Support	**3,670**	**-**	**-**	**3,670**
141-2-101-0078-1-72210-517210-PBEN-0000-101	Instructional Coach (1 FTE)	72,646			72,646

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-101-0078-1-72210-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0078-1-72210-519610-0000-0000-101	In-Service Stipends	15,000			15,000
141-2-101-0078-1-72210-520110-0000-0000-101	Social Security	5,558			5,558
141-2-101-0078-1-72210-520410-0000-0000-101	Retirement	8,068			8,068
141-2-101-0078-1-72210-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0078-1-72210-520710-0000-0000-101	Health Insurance	13,320			13,320
141-2-101-0078-1-72210-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0078-1-72210-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0078-1-72210-521210-0000-0000-101	Medicare	1,300			1,300
141-2-101-0078-1-72210-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0078-1-72210-529930-0000-0000-101	Short Term Disability	116			116
	Total 72210 - Regular Instruction Support	**118,463**	**-**	**-**	**118,463**
	Total East Side Elementary	**244,503**	**-**	**-**	**244,503**
Hardy Elementary					
141-2-101-0110-1-71100-513450-PWOB-0000-101	Instructional Personnel Interventionist/Tutor Part-time (1 FTE)	43,750			43,750
141-2-101-0110-1-71100-520110-0000-0000-101	Social Security	2,713			2,713
141-2-101-0110-1-71100-520770-0000-0000-101	Medical Insurance - Part-time	1,050			1,050
141-2-101-0110-1-71100-521210-0000-0000-101	Medicare	634			634
141-2-101-0110-1-71100-542910-0000-0000-101	Instructional Supplies	12,723		(3,200)	9,523
141-2-101-0110-1-71100-547110-0000-0000-101	Software	-	3,200		3,200
	Total 71100 - Regular Instruction	**60,870**	**3,200**	**(3,200)**	**60,870**
141-2-101-0110-1-72130-518810-0000-0000-101	Bonus	3,000			3,000
141-2-101-0110-1-72130-5189B0-PBEN-0000-101	Truancy Specialist (.5 FTE)	29,080			29,080
141-2-101-0110-1-72130-5189G0-PBEN-0000-101	Behavior Management Specialist (1 FTE)	46,907			46,907
141-2-101-0110-1-72130-520110-0000-0000-101	Social Security	4,897			4,897
141-2-101-0110-1-72130-520410-0000-0000-101	Retirement	11,611			11,611
141-2-101-0110-1-72130-520610-0000-0000-101	Life Insurance	60			60
141-2-101-0110-1-72130-520710-0000-0000-101	Medical Insurance	19,980			19,980
141-2-101-0110-1-72130-520810-0000-0000-101	Dental Insurance	441			441
141-2-101-0110-1-72130-521010-0000-0000-101	Unemployment Compensation	21			21
141-2-101-0110-1-72130-521210-0000-0000-101	Medicare	1,145			1,145
141-2-101-0110-1-72130-529910-0000-0000-101	Long Term Disability	161			161
141-2-101-0110-1-72130-529930-0000-0000-101	Short Term Disability	174			174
141-2-101-0110-1-72130-559990-0000-0000-101	Charges: Parental Involvement	2,836			2,836
	Total 72130 - Other Student Support	**120,313**	**-**	**-**	**120,313**
	Total Hardy Elementary	**181,183**	**3,200**	**(3,200)**	**181,183**
Hixson Elementary					
141-2-101-0127-1-71100-513450-PWOB-0000-101	Instruction Personnel Interventionist/Tutor Part-time (1.5 FTE)	43,245			43,245
141-2-101-0127-1-71100-514090-0000-0000-101	Teacher Supplements	-	1,600		1,600
141-2-101-0127-1-71100-516350-PWOB-0000-101	Educational Assistant - Behavior Part-time (1 FTE)	30,657	24,721		55,378
141-2-101-0127-1-71100-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0127-1-71100-520110-0000-0000-101	Social Security	4,707	1,632		6,339
141-2-101-0127-1-71100-520410-0000-0000-101	Retirement	4,796	144		4,940
141-2-101-0127-1-71100-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0127-1-71100-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0127-1-71100-520770-0000-0000-101	Medical Insurance - Part-time	1,313	300		1,613
141-2-101-0127-1-71100-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0127-1-71100-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0127-1-71100-521210-0000-0000-101	Medicare	1,101	382		1,483
141-2-101-0127-1-71100-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0127-1-71100-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0127-1-71100-542910-0000-0000-101	Instructional Supplies	34,898		(33,444)	1,454
	Total 71100 - Regular Instruction	**136,608**	**28,779**	**(33,444)**	**131,943**
141-2-101-0127-1-72130-518810-0000-0000-101	Bonus	500			500
141-2-101-0127-1-72130-5189B0-PBEN-0000-101	Truancy Specialist (.25 FTE)	13,750			13,750
141-2-101-0127-1-72130-520110-0000-0000-101	Social Security	884			884
141-2-101-0127-1-72130-520410-0000-0000-101	Retirement	2,095			2,095
141-2-101-0127-1-72130-520610-0000-0000-101	Life Insurance	10			10
141-2-101-0127-1-72130-520710-0000-0000-101	Medical Insurance	3,330			3,330
141-2-101-0127-1-72130-520810-0000-0000-101	Dental Insurance	74			74
141-2-101-0127-1-72130-521010-0000-0000-101	Unemployment Compensation	4			4
141-2-101-0127-1-72130-521210-0000-0000-101	Medicare	207			207
141-2-101-0127-1-72130-529910-0000-0000-101	Long Term Disability	27			27
141-2-101-0127-1-72130-529930-0000-0000-101	Short Term Disability	29			29
141-2-101-0127-1-72130-559990-0000-0000-101	Charges: Parental Involvement	2,879			2,879
	Total 72130 - Other Student Support	**23,789**	**-**	**-**	**23,789**
141-2-101-0127-1-72210-552410-0000-0000-101	Staff Development	-	2,665		2,665
	Total 72210 - Regular Instruction Support	**-**	**2,665**	**-**	**2,665**
141-2-101-0127-1-72710-531410-0000-0000-101	Contracts w/ Public Carriers	-	2,000		2,000
	Total 72710 - Transportation	**-**	**2,000**	**-**	**2,000**
	Total Hixson Elementary	**160,397**	**33,444**	**(33,444)**	**160,397**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
North Hamilton County Elementary					
141-2-101-0147-1-71100-513450-PWOB-0000-101	Instructional Personnel Interventionist/Tutor Part-time (1.5 FTE)	53,040	3,320		56,360
141-2-101-0147-1-71100-520110-0000-0000-101	Social Security	3,288	206		3,494
141-2-101-0147-1-71100-520770-0000-0000-101	Medical Insurance - Part-time	1,575	450		2,025
141-2-101-0147-1-71100-521210-0000-0000-101	Medicare	769	48		817
141-2-101-0147-1-71100-542910-0000-0000-101	Instructional Supplies	6,125		(6,125)	-
	Total 71100 - Regular Instruction	**64,797**	**4,024**	**(6,125)**	**62,696**
141-2-101-0147-1-72130-518960-PWOB-0000-101	Parent Coordinator Part-Time (.5 FTE)	1,213			1,213
141-2-101-0147-1-72130-520110-0000-0000-101	Social Security	75			75
141-2-101-0147-1-72130-520770-0000-0000-101	Medical Insurance - Part-time	525			525
141-2-101-0147-1-72130-521210-0000-0000-101	Medicare	18			18
	Total 72130 - Other Student Support	**1,831**	**-**	**-**	**1,831**
141-2-101-0147-1-72210-519610-0000-0000-101	In-Service Stipends	2,100	1,800		3,900
141-2-101-0147-1-72210-520110-0000-0000-101	Social Security	130	112		242
141-2-101-0147-1-72210-520410-0000-0000-101	Retirement	190	163		353
141-2-101-0147-1-72210-521210-0000-0000-101	Medicare	30	26		56
	Total 72210 - Regular Instruction Support	**2,450**	**2,101**	**-**	**4,551**
	Total North Hamilton County Elementary	**69,078**	**6,125**	**(6,125)**	**69,078**
Lookout Valley Elementary					
141-2-101-0241-1-71100-513450-PWOB-0000-101	Instructional Personnel Interventionist/Tutor Part-time (.5 FTE)	13,125			13,125
141-2-101-0241-1-71100-520110-0000-0000-101	Social Security	814			814
141-2-101-0241-1-71100-520410-0000-0000-101	Retirement	-	1,050		1,050
141-2-101-0241-1-71100-520770-0000-0000-101	Medical Insurance - Part-time	525			525
141-2-101-0241-1-71100-521210-0000-0000-101	Medicare	190			190
141-2-101-0241-1-71100-542910-0000-0000-101	Instructional Supplies	18,704		(1,050)	17,654
141-2-101-0241-1-71100-559990-0000-0000-101	Charges: Field Trips, etc	10,000		(5,000)	5,000
	Total 71100 - Regular Instruction	**43,358**	**1,050**	**(6,050)**	**38,358**
141-2-101-0241-1-72130-549990-0000-0000-101	Supplies, Awards, Postage	1,133			1,133
141-2-101-0241-1-72130-559990-0000-0000-101	Charges: Parental Involvement	1,467			1,467
	Total 72130 - Other Student Support	**2,600**	**-**	**-**	**2,600**
141-2-101-0241-1-72710-531410-0000-0000-101	Contracts w/ Public Carriers	-	5,000		5,000
	Total 72710 - Transportation	**-**	**5,000**	**-**	**5,000**
	Total Lookout Valley Elementary	**45,958**	**6,050**	**(6,050)**	**45,958**
Orchard Knob Elementary					
141-2-101-0194-1-71100-513450-PWOB-0000-101	Instruction Personnel Interventionist/Tutor Part-time (.25 FTE)	11,250			11,250
141-2-101-0194-1-71100-516310-PBEN-0000-101	Educational Assistant (1 FTE)	29,275			29,275
141-2-101-0194-1-71100-516350-PBEN-0000-101	Educational Assistant - Behavior (1 FTE)	29,645			29,645
141-2-101-0194-1-71100-518810-0000-0000-101	Bonus	4,000		(2,000)	2,000
141-2-101-0194-1-71100-520110-0000-0000-101	Social Security	4,599		(124)	4,475
141-2-101-0194-1-71100-520410-0000-0000-101	Retirement	9,249		(294)	8,955
141-2-101-0194-1-71100-520610-0000-0000-101	Life Insurance	80			80
141-2-101-0194-1-71100-520710-0000-0000-101	Medical Insurance	26,640			26,640
141-2-101-0194-1-71100-520770-0000-0000-101	Medical Insurance - Part-time	263			263
141-2-101-0194-1-71100-520810-0000-0000-101	Dental Insurance	588			588
141-2-101-0194-1-71100-521010-0000-0000-101	Unemployment Compensation	28			28
141-2-101-0194-1-71100-521210-0000-0000-101	Medicare	1,075		(29)	1,046
141-2-101-0194-1-71100-529910-0000-0000-101	Long Term Disability	214			214
141-2-101-0194-1-71100-529930-0000-0000-101	Short Term Disability	232			232
141-2-101-0194-1-71100-539980-0000-0000-101	Contract Substitutes	-	1,920		1,920
141-2-101-0194-1-71100-542910-0000-0000-101	Instructional Supplies	21,481		(10,965)	10,516
141-2-101-0194-1-71100-559990-0000-0000-101	Charges: Field Trips, etc	-	5,572		5,572
	Total 71100 - Regular Instruction	**138,619**	**7,492**	**(13,412)**	**132,699**
141-2-101-0194-1-72130-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0194-1-72130-5189G0-PBEN-0000-101	Behavior Management Specialist (1 FTE)	42,842			42,842
141-2-101-0194-1-72130-520110-0000-0000-101	Social Security	2,780			2,780
141-2-101-0194-1-72130-520410-0000-0000-101	Retirement	6,592			6,592
141-2-101-0194-1-72130-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0194-1-72130-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0194-1-72130-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0194-1-72130-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0194-1-72130-521210-0000-0000-101	Medicare	650			650
141-2-101-0194-1-72130-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0194-1-72130-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0194-1-72130-539990-0000-0000-101	Contracted Services	-	600		600
141-2-101-0194-1-72130-549990-0000-0000-101	Supplies, Awards, Postage	3,246		(2,811)	435
141-2-101-0194-1-72130-559990-0000-0000-101	Charges: Parental Involvement	-	2,211		2,211
	Total 72130 - Other Student Support	**72,001**	**2,811**	**(2,811)**	**72,001**
141-2-101-0194-1-72210-552410-0000-0000-101	Staff Development	-	3,500		3,500
	Total 72210 - Regular Instruction Support	**-**	**3,500**	**-**	**3,500**
141-2-101-0194-1-72710-531410-0000-0000-101	Contracts w/ Public Carriers	-	2,420		2,420
	Total 72710 - Transportation	**-**	**2,420**	**-**	**2,420**
	Total Orchard Knob Elementary	**210,620**	**16,223**	**(16,223)**	**210,620**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
Rivermont Elementary					
141-2-101-0183-1-71100-513450-PWOB-0000-101	Instruction Personnel Interventionist/Tutor Part-time (1 FTE)	40,120			40,120
141-2-101-0183-1-71100-514090-0000-0000-101	Teacher Supplements	3,000			3,000
141-2-101-0183-1-71100-520110-0000-0000-101	Social Security	2,673			2,673
141-2-101-0183-1-71100-520410-0000-0000-101	Retirement	270			270
141-2-101-0183-1-71100-520770-0000-0000-101	Medical Insurance - Part-time	1,050			1,050
141-2-101-0183-1-71100-521210-0000-0000-101	Medicare	626			626
141-2-101-0183-1-71100-542910-0000-0000-101	Instructional Supplies	11,875		(500)	11,375
141-2-101-0183-1-71100-547110-0000-0000-101	Software	4,000		(4,000)	-
	Total 71100 - Regular Instruction	**63,614**	**-**	**(4,500)**	**59,114**
141-2-101-0183-1-72130-559990-0000-0000-101	Charges: Parental Involvement	5,000			5,000
	Total 72130 - Other Student Support	**5,000**	**-**	**-**	**5,000**
141-2-101-0183-1-72210-519610-0000-0000-101	In-Service Stipends	7,650		(1,500)	6,150
141-2-101-0183-1-72210-520110-0000-0000-101	Social Security	474		(93)	381
141-2-101-0183-1-72210-520410-0000-0000-101	Retirement	688		(135)	553
141-2-101-0183-1-72210-521210-0000-0000-101	Medicare	111		(22)	89
141-2-101-0183-1-72210-552410-0000-0000-101	Staff Development	-	4,450		4,450
	Total 72210 - Regular Instruction Support	**8,923**	**4,450**	**(1,750)**	**11,623**
141-2-101-0183-1-72710-531410-0000-0000-101	Contracts w/ Public Carriers	-	1,800		1,800
	Total 72710 - Transportation	**-**	**1,800**	**-**	**1,800**
	Total Rivermont Elementary	**77,537**	**6,250**	**(6,250)**	**77,537**
Shepherd Elementary					
141-2-101-0017-1-71100-511610-PBEN-0000-101	Teacher (1 FTE)	73,475			73,475
141-2-101-0017-1-71100-520110-0000-0000-101	Social Security	4,555			4,555
141-2-101-0017-1-71100-520410-0000-0000-101	Retirement	6,613			6,613
141-2-101-0017-1-71100-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0017-1-71100-520710-0000-0000-101	Medical Insurance	13,320			13,320
141-2-101-0017-1-71100-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0017-1-71100-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0017-1-71100-521210-0000-0000-101	Medicare	1,065			1,065
141-2-101-0017-1-71100-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0017-1-71100-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0017-1-71100-542910-0000-0000-101	Instructional Supplies	13,500		(12,000)	1,500
	Total 71100 - Regular Instruction	**113,099**	**-**	**(12,000)**	**101,099**
141-2-101-0017-1-72130-518810-0000-0000-101	Other Student Support Bonuses	3,000			3,000
141-2-101-0017-1-72130-518960-PBEN-0000-101	Parent Volunteer Coordinator (1 FTE)	31,790			31,790
141-2-101-0017-1-72130-5189B0-PBEN-0000-101	Truancy Specialist (.5 FTE)	33,568			33,568
141-2-101-0017-1-72130-520110-0000-0000-101	Social Security	4,238			4,238
141-2-101-0017-1-72130-520410-0000-0000-101	Retirement	10,049			10,049
141-2-101-0017-1-72130-520610-0000-0000-101	Life Insurance	60			60
141-2-101-0017-1-72130-520710-0000-0000-101	Medical Insurance	19,980			19,980
141-2-101-0017-1-72130-520810-0000-0000-101	Dental Insurance	441			441
141-2-101-0017-1-72130-521010-0000-0000-101	Unemployment Compensation	21			21
141-2-101-0017-1-72130-521210-0000-0000-101	Medicare	991			991
141-2-101-0017-1-72130-529910-0000-0000-101	Long Term Disability	161			161
141-2-101-0017-1-72130-529930-0000-0000-101	Short Term Disability	174			174
	Total 72130 - Other Student Support	**104,473**	**-**	**-**	**104,473**
141-2-101-0017-1-72210-519610-0000-0000-101	In-Service Stipends	-	1,000		1,000
141-2-101-0017-1-72210-520110-0000-0000-101	Social Security	-	62		62
141-2-101-0017-1-72210-520410-0000-0000-101	Retirement	-	90		90
141-2-101-0017-1-72210-521210-0000-0000-101	Medicare	-	15		15
141-2-101-0017-1-72210-552410-0000-0000-101	Staff Development	3,395	10,833		14,228
	Total 72210 - Regular Instruction Support	**3,395**	**12,000**	**-**	**15,395**
	Total Shepherd Elementary	**220,967**	**12,000**	**(12,000)**	**220,967**
Snow Hill Elementary					
141-2-101-0215-1-71100-513450-PWOB-0000-101	Other Instructional Personnel - Part-Time Tutor (2 FTE)	74,250	8,800		83,050
141-2-101-0215-1-71100-514090-0000-0000-101	Teacher Supplemental Pay	7,000			7,000
141-2-101-0215-1-71100-520110-0000-0000-101	Social Security	5,038	546		5,584
141-2-101-0215-1-71100-520410-0000-0000-101	Retirement	630			630
141-2-101-0215-1-71100-520770-0000-0000-101	Medical Insurance - Part-time	2,625	450		3,075
141-2-101-0215-1-71100-521210-0000-0000-101	Medicare	1,179	128		1,307
141-2-101-0215-1-71100-542910-0000-0000-101	Instructional Supplies	18,453		(9,924)	8,529
	Total 71100 - Regular Instruction	**109,175**	**9,924**	**(9,924)**	**109,175**
141-2-101-0215-1-72130-539990-0000-0000-101	Contracted Services	700			700
141-2-101-0215-1-72130-549990-0000-0000-101	Other Supplies and Materials	500			500
141-2-101-0215-1-72130-559990-0000-0000-101	Charges: Parental Involvement	1,560			1,560
	Total 72130 - Other Student Support	**2,760**	**-**	**-**	**2,760**
	Total Snow Hill Elementary	**111,935**	**9,924**	**(9,924)**	**111,935**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
Woodmore Elementary					
141-2-101-0245-1-71100-513450-PWOB-0000-101	Other Instructional Personnel - Part-Time Tutor (1.5 FTE)	45,700			45,700
141-2-101-0245-1-71100-520110-0000-0000-101	Social Security	2,833			2,833
141-2-101-0245-1-71100-520410-0000-0000-101	Retirement	1,160			1,160
141-2-101-0245-1-71100-520770-0000-0000-101	Medical Insurance - Part-time	1,575		(35)	1,540
141-2-101-0245-1-71100-521210-0000-0000-101	Medicare	662			662
141-2-101-0245-1-71100-539980-0000-0000-101	Contract Substitutes	-	2,000		2,000
141-2-101-0245-1-71100-539990-0000-0000-101	Other Contracted Services	5,500			5,500
141-2-101-0245-1-71100-542910-0000-0000-101	Instructional Supplies	11,093		(11,093)	-
141-2-101-0245-1-71100-542930-0000-0000-101	Instructional Supplies - Equipment	1,448			1,448
141-2-101-0245-1-71100-559990-0000-0000-101	Charges: Field Trips, etc	-	2,000		2,000
	Total 71100 - Regular Instruction	**69,971**	**4,000**	**(11,128)**	**62,843**
141-2-101-0245-1-72130-518810-0000-0000-101	Bonus	200			200
141-2-101-0245-1-72130-5189G0-PBEN-0000-101	Behavior Management Specialist (.10 FTE)	5,547			5,547
141-2-101-0245-1-72130-520110-0000-0000-101	Social Security	357			357
141-2-101-0245-1-72130-520410-0000-0000-101	Retirement	440			440
141-2-101-0245-1-72130-520610-0000-0000-101	Life Insurance	4			4
141-2-101-0245-1-72130-520710-0000-0000-101	Medical Insurance	1,332			1,332
141-2-101-0245-1-72130-520810-0000-0000-101	Dental Insurance	29			29
141-2-101-0245-1-72130-521010-0000-0000-101	Unemployment Compensation	2			2
141-2-101-0245-1-72130-521210-0000-0000-101	Medicare	83			83
141-2-101-0245-1-72130-529910-0000-0000-101	Long Term Disability	11			11
141-2-101-0245-1-72130-529930-0000-0000-101	Short Term Disability	12			12
141-2-101-0245-1-72130-559990-0000-0000-101	Charges: Parental Involvement	2,209			2,209
	Total 72130 - Other Student Support	**10,226**	**-**	**-**	**10,226**
141-2-101-0245-1-72210-517210-PBEN-0000-101	Instructional Coach (.5 FTE)	35,889			35,889
141-2-101-0245-1-72210-518810-0000-0000-101	Bonus	1,000			1,000
141-2-101-0245-1-72210-518990-0000-0000-101	Other Salaries and Wages	2,500	2,500		5,000
141-2-101-0245-1-72210-519610-0000-0000-101	In-Service Stipends	550			550
141-2-101-0245-1-72210-520110-0000-0000-101	Social Security	2,594	155		2,749
141-2-101-0245-1-72210-520410-0000-0000-101	Retirement	3,806	368		4,174
141-2-101-0245-1-72210-520610-0000-0000-101	Life Insurance	20			20
141-2-101-0245-1-72210-520710-0000-0000-101	Health Insurance	6,660			6,660
141-2-101-0245-1-72210-520810-0000-0000-101	Dental Insurance	147			147
141-2-101-0245-1-72210-521010-0000-0000-101	Unemployment Compensation	7			7
141-2-101-0245-1-72210-521210-0000-0000-101	Medicare	606	36		642
141-2-101-0245-1-72210-529910-0000-0000-101	Long Term Disability	54			54
141-2-101-0245-1-72210-529930-0000-0000-101	Short Term Disability	58			58
141-2-101-0245-1-72210-552410-0000-0000-101	Staff Development	-	3,034		3,034
	Total 72210 - Regular Instruction Support	**53,891**	**6,093**	**-**	**59,984**
141-2-101-0245-1-72710-531410-0000-0000-101	Contracts w/ Public Carriers	-	1,000		1,000
	Total 72710 - Transportation	**-**	**1,000**	**-**	**1,000**
	Total Woodmore Elementary	**134,088**	**11,093**	**(11,128)**	**134,053**
Brown Academy					
141-2-101-0033-1-71100-513450-PWOB-0000-101	Other Instructional Personnel - Part-Time Tutor (1.5 FTE)	60,180			60,180
141-2-101-0033-1-71100-516310-PBEN-0000-101	Educational Assistant (1 FTE)	23,000			23,000
141-2-101-0033-1-71100-516310-PWOB-0000-101	Educational Assistant Part-time (.5 FTE)	2,198		(563)	1,635
141-2-101-0033-1-71100-520110-0000-0000-101	Social Security	5,294			5,294
141-2-101-0033-1-71100-520410-0000-0000-101	Retirement	3,381		(35)	3,346
141-2-101-0033-1-71100-520610-0000-0000-101	Life Insurance	35			35
141-2-101-0033-1-71100-520710-0000-0000-101	Medical Insurance	11,783			11,783
141-2-101-0033-1-71100-520770-0000-0000-101	Medical Insurance - Part-time	75	1,575		1,650
141-2-101-0033-1-71100-520810-0000-0000-101	Dental Insurance	260			260
141-2-101-0033-1-71100-521010-0000-0000-101	Unemployment Compensation	12			12
141-2-101-0033-1-71100-521210-0000-0000-101	Medicare	1,238		(8)	1,230
141-2-101-0033-1-71100-529910-0000-0000-101	Long Term Disability	95			95
141-2-101-0033-1-71100-529930-0000-0000-101	Short Term Disability	103			103
141-2-101-0033-1-71100-542910-0000-0000-101	Instructional Supplies	9,168		(2,649)	6,519
	Total 71100 - Regular Instruction	**116,822**	**1,575**	**(3,255)**	**115,142**
141-2-101-0033-1-72130-559990-0000-0000-101	Charges: Parental Involvement	1,898			1,898
	Total 72130 - Other Student Support	**1,898**	**-**	**-**	**1,898**
141-2-101-0033-1-72210-519610-0000-0000-101	In-Service Stipends	-	1,440		1,440
141-2-101-0033-1-72210-520110-0000-0000-101	Social Security	-	89		89
141-2-101-0033-1-72210-520410-0000-0000-101	Retirement	-	130		130
141-2-101-0033-1-72210-521210-0000-0000-101	Medicare	-	21		21
	Total 72210 - Regular Instruction Support	**-**	**1,680**	**-**	**1,680**
141-2-101-0033-1-72710-531410-0000-0000-101	Contracts w/ Public Carriers	3,000			3,000
	Total 72710 - Transportation	**3,000**	**-**	**-**	**3,000**
	Total Brown Academy	**121,720**	**3,255**	**(3,255)**	**121,720**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
Battle Academy					
141-2-101-0016-1-71100-542910-0000-0000-101	Instructional Supplies	9,550		(9,550)	-
	Total 71100 - Regular Instruction	**9,550**	**-**	**(9,550)**	**-**
141-2-101-0016-1-72130-559990-0000-0000-101	Charges: Parental Involvement	2,655			2,655
	Total 72130 - Other Student Support	**2,655**	**-**	**-**	**2,655**
141-2-101-0016-1-72210-518810-0000-0000-101	Bonus	2,000			2,000
141-2-101-0016-1-72210-5189E0-0000-0000-101	Dean (1 FTE)	63,717		(22)	63,695
141-2-101-0016-1-72210-520110-0000-0000-101	Social Security	4,074			4,074
141-2-101-0016-1-72210-520410-0000-0000-101	Retirement	5,915		(3)	5,912
141-2-101-0016-1-72210-520610-0000-0000-101	Life Insurance	40			40
141-2-101-0016-1-72210-520710-0000-0000-101	Health Insurance	13,320			13,320
141-2-101-0016-1-72210-520810-0000-0000-101	Dental Insurance	294			294
141-2-101-0016-1-72210-521010-0000-0000-101	Unemployment Compensation	14			14
141-2-101-0016-1-72210-521210-0000-0000-101	Medicare	953			953
141-2-101-0016-1-72210-529910-0000-0000-101	Long Term Disability	107			107
141-2-101-0016-1-72210-529930-0000-0000-101	Short Term Disability	116			116
141-2-101-0016-1-72210-552410-0000-0000-101	Staff Development	-	4,750		4,750
	Total 72210 - Regular Instruction Support	**90,550**	**4,750**	**(25)**	**95,275**
141-2-101-0016-1-72710-531410-0000-0000-101	Contracts w/ Public Carriers	4,950	4,825		9,775
	Total 72710 - Transportation	**4,950**	**4,825**	**-**	**9,775**
	Total Battle Academy	**107,705**	**9,575**	**(9,575)**	**107,705**
	TOTAL BUDGET	**19,695,811**	**1,105,615**	**(1,094,324)**	**19,707,102**

HAMILTON COUNTY DEPARTMENT OF EDUCATION
FEDERAL PROGRAMS
TITLE II, PART A: TEACHER AND PRINCIPAL TRAINING AND RECRUITING GRANT
BUDGET FISCAL YEAR 2025-2026
FY25 actual carryover $957,279.14

	2026 Award	2,415,983	411		2,416,394
	2025 Carryover	957,279			957,279
	Transfer to Consolidated Administration	(221,147)			(221,147)
	Total Source of Funds	**3,152,115**	**411**	**-**	**3,152,526**

SOURCE OF FUNDS SUMMARY

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-102-0000-0-00000-471890-0000-0000-102	Revenue	3,152,115	411		3,152,526
	Total Source of Funds	**3,152,115**	**411**	**-**	**3,152,526**

USE OF FUNDS SUMMARY

71100	Regular Instruction	12,600	3,557	-	16,157
71200	Special Education Program	797,986	-	-	797,986
72210	Regular Instruction Support	2,143,505	29,450	(32,608)	2,140,347
72410	Office of the Principal	8,160	-	-	8,160
72520	Human Services	96,274	-	-	96,274
99100	Indirect Cost	93,590	12	-	93,602
	Total Use of Funds	**3,152,115**	**33,019**	**(32,608)**	**3,152,526**

USE OF FUNDS DETAIL

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-102-0000-0-99100-550410-0000-0000-102	Indirect Cost (3.06%)	93,590	12		93,602
	Total 99100 - Indirect Cost	**93,590**	**12**	**-**	**93,602**
Salary Set Aside					
141-2-102-0000-0-72210-510510-PBEN-2100-102	Directors (4.5)	591,664			591,664
141-2-102-0000-0-72210-510530-PBEN-2100-102	Induction Coordinator (1 FTE)	97,661			97,661
141-2-102-0000-0-72210-5189K0-PBEN-2100-102	District Wide Content Lead (3 FTE)	242,131			242,131
141-2-102-0000-0-72210-516210-PBEN-2100-102	Clerical (1 FTE)	54,822			54,822
141-2-102-0000-0-72210-518810-0000-2100-102	Bonus	17,000			17,000
141-2-102-0000-0-72210-520110-0000-2100-102	Social Security	58,875			58,875
141-2-102-0000-0-72210-520410-0000-2100-102	State Retirement	71,000	399		71,399
141-2-102-0000-0-72210-520610-0000-2100-102	Life Insurance	371			371
141-2-102-0000-0-72210-520710-0000-2100-102	Health Insurance	127,000			127,000
141-2-102-0000-0-72210-520810-0000-2100-102	Dental Insurance	2,800			2,800
141-2-102-0000-0-72210-521010-0000-2100-102	Unemployment Compensation	131			131
141-2-102-0000-0-72210-521210-0000-2100-102	Medicare	13,770			13,770
141-2-102-0000-0-72210-529910-0000-2100-102	Long Term Disability	1,020			1,020
141-2-102-0000-0-72210-529930-0000-2100-102	Short Term Disability	1,102			1,102
	Total 72210 - Regular Instruction Support	**1,279,347**	**399**	**-**	**1,279,746**
141-2-102-0000-0-72520-510520-PBEN-2100-102	Supervisor (1 FTE)	69,577			69,577
141-2-102-0000-0-72520-518810-0000-2100-102	Bonus	2,000			2,000
141-2-102-0000-0-72520-520110-0000-2100-102	Social Security	4,300			4,300
141-2-102-0000-0-72520-520410-0000-2100-102	State Retirement	5,468			5,468
141-2-102-0000-0-72520-520610-0000-2100-102	Life Insurance	40			40
141-2-102-0000-0-72520-520710-0000-2100-102	Health Insurance	13,320			13,320
141-2-102-0000-0-72520-520810-0000-2100-102	Dental Insurance	294			294
141-2-102-0000-0-72520-521010-0000-2100-102	Unemployment Compensation	14			14
141-2-102-0000-0-72520-521210-0000-2100-102	Medicare	1,038			1,038
141-2-102-0000-0-72520-529910-0000-2100-102	Long Term Disability	107			107
141-2-102-0000-0-72520-529930-0000-2100-102	Short Term Disability	116			116
	Total 72520 - Human Services	96,274	-	-	96,274
	Total Salary Set Aside	**1,375,621**	**399**	**-**	**1,376,020**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
School Support					
141-2-102-6000-0-71200-514100-0000-0000-102	Differentiated Compensation	100			100
141-2-102-6000-0-71200-518810-0000-0000-102	Bonus Pay	684,000			684,000
141-2-102-6000-0-71200-520110-0000-0000-102	Social Security	42,408			42,408
141-2-102-6000-0-71200-520410-0000-0000-102	State Retirement	61,560			61,560
141-2-102-6000-0-71200-521210-0000-0000-102	Medicare	9,918			9,918
	Total 71200 - Special Education Program	**797,986**	**-**	**-**	**797,986**
141-2-102-6000-0-72210-552410-0000-0000-102	Staff Development	86,808			86,808
	Total 72210 - Regular Instruction Support	**86,808**	**-**	**-**	**86,808**
141-2-102-7056-7-72410-514100-0000-0000-102	Differentiated Compensation	2,000			2,000
141-2-102-7056-7-72410-518810-0000-0000-102	Bonus	2,500			2,500
141-2-102-7056-7-72410-518990-0000-0000-102	Other Salaries and Wages	2,500			2,500
141-2-102-7056-7-72410-520110-0000-0000-102	Social Security	450			450
141-2-102-7056-7-72410-520410-0000-0000-102	State Retirement	600			600
141-2-102-7056-7-72410-521210-0000-0000-102	Medicare	110			110
	Total 72410 - Office of the Principal	**8,160**	**-**	**-**	**8,160**
	Total School Support Staff Development	**892,954**	**-**	**-**	**892,954**
Harrison Bay Learning Community					
141-2-102-6001-0-72210-519610-0000-0000-102	In-Service Stipends	4,250		(4,250)	-
141-2-102-6001-0-72210-520110-0000-0000-102	Social Security	264		(264)	-
141-2-102-6001-0-72210-520410-0000-0000-102	State Retirement	424		(424)	-
141-2-102-6001-0-72210-521210-0000-0000-102	Medicare	62		(62)	-
141-2-102-6001-0-72210-552410-0000-0000-102	Staff Development	20,000	5,000		25,000
	Total 72210 - Regular Instruction Support	**25,000**	**5,000**	**(5,000)**	**25,000**
	Total Harrison Bay Learning Community	**25,000**	**5,000**	**(5,000)**	**25,000**
Missionary Ridge Learning Community					
141-2-102-6003-0-72210-552410-0000-0000-102	Staff Development	25,000			25,000
	Total 72210 - Regular Instruction Support	**25,000**	**-**	**-**	**25,000**
	Total Missionary Ridge Learning Community	**25,000**	**-**	**-**	**25,000**
North River Learning Community					
141-2-102-6004-0-72210-519610-0000-0000-102	In-Service Stipends	4,250		(4,250)	-
141-2-102-6004-0-72210-520110-0000-0000-102	Social Security	264		(264)	-
141-2-102-6004-0-72210-520410-0000-0000-102	State Retirement	424		(424)	-
141-2-102-6004-0-72210-521210-0000-0000-102	Medicare	62		(62)	-
141-2-102-6004-0-72210-552410-0000-0000-102	Staff Development	20,000	5,000		25,000
	Total 72210 - Regular Instruction Support	**25,000**	**5,000**	**(5,000)**	**25,000**
	Total North River Learning Community	**25,000**	**5,000**	**(5,000)**	**25,000**
Rock Point Learning Community					
141-2-102-6005-0-72210-519610-0000-0000-102	In-Service Stipends	4,250		(4,250)	-
141-2-102-6005-0-72210-520110-0000-0000-102	Social Security	264		(264)	-
141-2-102-6005-0-72210-520410-0000-0000-102	State Retirement	424		(424)	-
141-2-102-6005-0-72210-521210-0000-0000-102	Medicare	62		(62)	-
141-2-102-6005-0-72210-552410-0000-0000-102	Staff Development	20,000		5,000	25,000
	Total 72210 - Regular Instruction Support	**25,000**	**-**	**-**	**25,000**
	Total Rock Point Learning Community	**25,000**	**-**	**-**	**25,000**
Midtown Learning Community					
141-2-102-6002-0-72210-552410-0000-0000-102	Staff Development	25,000			25,000
	Total 72210 - Regular Instruction Support	**25,000**	**-**	**-**	**25,000**
	Total Midtown Learning Community	**25,000**	**-**	**-**	**25,000**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
Human Resources					
141-2-102-0000-0-72210-519610-0000-2160-102	In-Service Stipends	37,200			37,200
141-2-102-0000-0-72210-520110-0000-2160-102	Social Security	2,306			2,306
141-2-102-0000-0-72210-520410-0000-2160-102	State Retirement	3,348			3,348
141-2-102-0000-0-72210-521210-0000-2160-102	Medicare	539			539
141-2-102-0000-0-72210-547110-0000-2160-102	Software	17,510		(17,510)	-
141-2-102-0000-0-72210-552410-0000-2160-102	Staff Development	39,097	17,510		56,607
	Total 72210 - Regular Instruction Support	**100,000**	**17,510**	**(17,510)**	**100,000**
	Total Human Resources	**100,000**	**17,510**	**(17,510)**	**100,000**
	Total School Support, Salary Set Aside	**2,493,575**	**27,909**	**(27,510)**	**2,493,974**
PRIVATE SCHOOLS					
Grace Baptist					
141-2-102-9007-5-72210-552410-0000-0000-102	Staff Development	27,551			27,551
	Total 72210 - Regular Instruction Support	**27,551**	**-**	**-**	**27,551**
Avondale SDA					
141-2-102-9010-5-72210-552410-0000-0000-102	Staff Development	11,124			11,124
	Total 72210 - Regular Instruction Support	**11,124**	**-**	**-**	**11,124**
Berean Academy					
141-2-102-9020-5-72210-552410-0000-0000-102	Staff Development	30,871			30,871
	Total 72210 - Regular Instruction Support	**30,871**	**-**	**-**	**30,871**
Boyd Buchanan					
141-2-102-9025-5-72210-539990-0000-0000-102	Contracted Services	1,000			1,000
141-2-102-9025-5-72210-552410-0000-0000-102	Staff Development	45,254			45,254
	Total 72210 - Regular Instruction Support	**46,254**	**-**	**-**	**46,254**
Brainerd Baptist					
141-2-102-9030-5-72210-552410-0000-0000-102	Staff Development	10,839			10,839
	Total 72210 - Regular Instruction Support	**10,839**	**-**	**-**	**10,839**
Bright School					
141-2-102-9035-5-72210-552410-0000-0000-102	Staff Development	26,350			26,350
	Total 72210 - Regular Instruction Support	**26,350**	**-**	**-**	**26,350**
Chattanooga Christian					
141-2-102-9045-5-71100-539980-0000-0000-102	Contracted Services - Substitutes	12,600			12,600
	Total 71100 - Regular Instruction	**12,600**	**-**	**-**	**12,600**
141-2-102-9045-5-72210-539990-0000-0000-102	Contracted Services	55,825			55,825
141-2-102-9045-5-72210-552410-0000-0000-102	Staff Development	31,000			31,000
	Total 72210 - Regular Instruction Support	**86,825**	**-**	**-**	**86,825**
Montessori					
141-2-102-9066-5-72210-552410-0000-0000-102	Staff Development	8,240			8,240
	Total 72210 - Regular Instruction Support	**8,240**	**-**	**-**	**8,240**
Hickory Valley Christian					
141-2-102-9075-5-72210-552410-0000-0000-102	Staff Development	5,770			5,770
	Total 72210 - Regular Instruction Support	**5,770**	**-**	**-**	**5,770**
Silverdale Baptist Academy					
141-2-102-9081-5-72210-552410-0000-0000-102	Staff Development	70,818			70,818
	Total 72210 - Regular Instruction Support	**70,818**	**-**	**-**	**70,818**
Belvoir Christian Academy					
141-2-102-9090-5-72210-552410-0000-0000-102	Staff Development	12,865			12,865
	Total 72210 - Regular Instruction Support	**12,865**	**-**	**-**	**12,865**
Collegedale Academy Elementary					
141-2-102-9108-5-72210-552410-0000-0000-102	Staff Development	10,610			10,610
	Total 72210 - Regular Instruction Support	**10,610**	**-**	**-**	**10,610**
Collegedale Academy High					
141-2-102-9110-5-72210-547110-0000-0000-102	Software	1,700			1,700
141-2-102-9110-5-72210-552410-0000-0000-102	Staff Development	14,474			14,474
	Total 72210 - Regular Instruction Support	**16,174**	**-**	**-**	**16,174**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
Our Lady of Perpetual Help					
141-2-102-9115-5-72210-539990-0000-0000-102	Contracted Services	7,300			7,300
141-2-102-9115-5-72210-552410-0000-0000-102	Staff Development	11,424			11,424
	Total 72210 - Regular Instruction Support	**18,724**	**-**	**-**	**18,724**
Skyuka Hall					
141-2-102-9120-5-72210-552410-0000-0000-102	Staff Development	13,909			13,909
	Total 72210 - Regular Instruction Support	**13,909**	**-**	**-**	**13,909**
Saint Jude					
141-2-102-9140-5-72210-539990-0000-0000-102	Contracted Services	3,000			3,000
141-2-102-9140-5-72210-552410-0000-0000-102	Staff Development	36,348			36,348
	Total 72210 - Regular Instruction Support	**39,348**	**-**	**-**	**39,348**
St. Nicholas					
141-2-102-9145-5-72210-552410-0000-0000-102	Staff Development	4,859			4,859
	Total 72210 - Regular Instruction Support	**4,859**	**-**	**-**	**4,859**
St. Peter's					
141-2-102-9147-5-72210-552410-0000-0000-102	Staff Development	12,307			12,307
	Total 72210 - Regular Instruction Support	**12,307**	**-**	**-**	**12,307**
Annoor Academy					
141-2-102-9181-5-72210-539990-0000-0000-102	Contracted Services	6,343			6,343
	Total 72210 - Regular Instruction Support	**6,343**	**-**	**-**	**6,343**
Collegedale Adventist Middle					
141-2-102-9300-5-72210-552410-0000-0000-102	Staff Development	13,970			13,970
	Total 72210 - Regular Instruction Support	**13,970**	**-**	**-**	**13,970**
Notre Dame					
141-2-102-9325-5-72210-552410-0000-0000-102	Staff Development	45,693			45,693
	Total 72210 - Regular Instruction Support	**45,693**	**-**	**-**	**45,693**
Beacon Academy					
141-2-102-9823-5-72210-539990-0000-0000-102	Contracted Services	-	360		360
141-2-102-9823-5-72210-552410-0000-0000-102	Staff Development	4,681		(360)	4,321
	Total 72210 - Regular Instruction Support	**4,681**	**360**	**(360)**	**4,681**
Redemption Point Christian Academy					
141-2-102-9898-5-72210-552410-0000-0000-102	Staff Development	5,764			5,764
	Total 72210 - Regular Instruction Support	**5,764**	**-**	**-**	**5,764**
Mission Montessori					
141-2-102-9941-5-72210-552410-0000-0000-102	Staff Development	540			540
	Total 72210 - Regular Instruction Support	**540**	**-**	**-**	**540**
	Total Private Schools	**543,029**	**360**	**(360)**	**543,029**
CHARTER SCHOOLS					
Chattanooga Girls Leadership Academy					
141-2-102-8001-8-72210-552410-0000-0000-102	Staff Development	2,595			2,595
	Total 72210 - Regular Instruction Support	**2,595**	**-**	**-**	**2,595**
Ivy Academy					
141-2-102-8002-8-71100-539980-0000-0000-102	Contract Substitutes	-	3,557		3,557
	Total 71100 - Regular Instruction	**-**	**3,557**	**-**	**3,557**
141-2-102-8002-8-72210-559990-0000-0000-102	Other Charges: Stipends PD	3,557		(3,557)	-
	Total 72210 - Regular Instruction Support	**3,557**	**-**	**(3,557)**	**-**
	Total Ivy Academy	**3,557**	**3,557**	**(3,557)**	**3,557**
Chattanooga Charter School of Excellence Elementary					
141-2-102-8003-8-72210-559990-0000-0000-102	Other Charges: Stipends PD	3,390			3,390
	Total 72210 - Regular Instruction Support	**3,390**	**-**	**-**	**3,390**
Skillern Elementary					
141-2-102-8005-8-72210-559990-0000-0000-102	Other Charges: Stipends PD	2,041			2,041
	Total 72210 - Regular Instruction Support	**2,041**	**-**	**-**	**2,041**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
Chatt Academy Community School					
141-2-102-8006-8-72210-552410-0000-0000-102	Staff Development	1,137			1,137
	Total 72210 - Regular Instruction Support	**1,137**	**-**	**-**	**1,137**
Chattanooga Charter School of Excellence Middle					
141-2-102-8010-8-72210-552410-0000-0000-102	Staff Development	379			379
141-2-102-8010-8-72210-559990-0000-0000-102	Other Charges: Stipends PD	1,400			1,400
	Total 72210 - Regular Instruction Support	**1,779**	**-**	**-**	**1,779**
Chattanooga Preparatory School					
141-2-102-8011-8-72210-552410-0000-0000-102	Staff Development	3,864			3,864
	Total 72210 - Regular Instruction Support	**3,864**	**-**	**-**	**3,864**
Chattanooga Charter School of Excellence High					
141-2-102-8015-8-72210-552410-0000-0000-102	Staff Development	-	1,181		1,181
141-2-102-8015-8-72210-559990-0000-0000-102	Other Charges: Stipends PD	1,181		(1,181)	-
	Total 72210 - Regular Instruction Support	**1,181**	**1,181**	**(1,181)**	**1,181**
CGLA Montessori					
141-2-102-8142-8-72210-552410-0000-0000-102	Staff Development	2,377			2,377
	Total 72210 - Regular Instruction Support	**2,377**	**-**	**-**	**2,377**
	Total Charter Schools	**21,921**	**4,738**	**(4,738)**	**21,921**
	TOTAL BUDGET	**3,152,115**	**33,019**	**(32,608)**	**3,152,526**

HAMILTON COUNTY DEPARTMENT OF EDUCATION
FEDERAL PROGRAMS
TITLE III: LANGUAGE INSTRUCTION FOR ENGLISH LEARNERS AND IMMIGRANT STUDENTS
BUDGET FISCAL YEAR 2025-2026

	2026 Award	730,660	3,350		734,010
	2025 Carryover	299,170			299,170
	Transfer to Consolidated Administration	(100)			(100)
	Total Source of Funds	**1,029,730**	**3,350**	**-**	**1,033,080**

SOURCE OF FUNDS SUMMARY

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-103-0000-0-00000-471460-0000-0000-103	Revenue	1,029,730	3,350		1,033,080
	Total Source of Funds	**1,029,730**	**3,350**	**-**	**1,033,080**

USE OF FUNDS SUMMARY

71100	Regular Instruction	564,578	2,675	(137,910)	429,343
72130	Other Student Support	33,135	18,150	-	51,285
72210	Instructional Support	417,765	131,902	(11,667)	538,000
99100	Indirect Cost	14,252	200	-	14,452
	Total Use of Funds	**1,029,730**	**152,927**	**(149,577)**	**1,033,080**

USE OF FUNDS DETAIL

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-103-6000-0-71100-514090-0000-0000-103	Teachers Supplements	51,200			51,200
141-2-103-6000-0-71100-516310-PBEN-0000-103	Educational Assistants (4 FTE)	122,000		(10,000)	112,000
141-2-103-6000-0-71100-518810-0000-0000-103	Bonus	8,000			8,000
141-2-103-6000-0-71100-520110-0000-0000-103	Social Security	11,234		(620)	10,614
141-2-103-6000-0-71100-520410-0000-0000-103	State Retirement	23,718		(1,470)	22,248
141-2-103-6000-0-71100-520610-0000-0000-103	Life Insurance	160			160
141-2-103-6000-0-71100-520710-0000-0000-103	Medical Insurance	53,280			53,280
141-2-103-6000-0-71100-520810-0000-0000-103	Dental Insurance	1,176			1,176
141-2-103-6000-0-71100-521010-0000-0000-103	Unemployment Compensation	56			56
141-2-103-6000-0-71100-521210-0000-0000-103	Medicare	2,628		(145)	2,483
141-2-103-6000-0-71100-529910-0000-0000-103	Long Term Disability	428			428
141-2-103-6000-0-71100-529930-0000-0000-103	Short Term Disability	464			464
141-2-103-6000-0-71100-539980-0000-0000-103	Contract Substitutes	15,000		(15,000)	-
141-2-103-6000-0-71100-542910-0000-0000-103	Instructional Supplies	180,374		(108,000)	72,374
141-2-103-6000-0-71100-547110-0000-0000-103	Software	88,850			88,850
	Total 71100 - Regular Instruction	**558,568**	**-**	**(135,235)**	**423,333**
141-2-103-6000-0-72130-518990-0000-0000-103	Other Salaries and Wages	19,417			19,417
141-2-103-6000-0-72130-520110-0000-0000-103	Social Security	1,204			1,204
141-2-103-6000-0-72130-520410-0000-0000-103	State Retirement	1,748			1,748
141-2-103-6000-0-72130-521210-0000-0000-103	Medicare	282			282
141-2-103-6000-0-72130-539990-0000-0000-103	Contracted Services	5,970	18,150		24,120
	Total 72130 - Other Student Support	**28,621**	**18,150**	**-**	**46,771**
141-2-103-0000-0-72210-518810-0000-0000-103	Bonus	4,000			4,000
141-2-103-0000-0-72210-5189D0-PBEN-0000-103	Content Lead (2 FTE)	156,000		(10,000)	146,000
141-2-103-0000-0-72210-519610-0000-0000-103	In-Service Stipends	78,000			78,000
141-2-103-0000-0-72210-520110-0000-0000-103	Social Security	14,756		(620)	14,136
141-2-103-0000-0-72210-520410-0000-0000-103	State Retirement	21,420		(902)	20,518
141-2-103-0000-0-72210-520610-0000-0000-103	Life Insurance	80			80
141-2-103-0000-0-72210-520710-0000-0000-103	Medical Insurance	26,640			26,640
141-2-103-0000-0-72210-520810-0000-0000-103	Dental Insurance	588	2		590
141-2-103-0000-0-72210-521010-0000-0000-103	Unemployment Compensation	28			28
141-2-103-0000-0-72210-521210-0000-0000-103	Medicare	3,451		(145)	3,306
141-2-103-0000-0-72210-529910-0000-0000-103	Long Term Disability	214			214
141-2-103-0000-0-72210-529930-0000-0000-103	Short Term Disability	232			232
141-2-103-0000-0-72210-535510-0000-0000-103	Travel	8,950			8,950
141-2-103-0000-0-72210-552410-0000-0000-103	Staff Development	103,406	131,900		235,306
	Total 72210 - Instructional Support	**417,765**	**131,902**	**(11,667)**	**538,000**
141-2-103-0000-0-99100-550410-0000-0000-103	Indirect Cost (3.06%)	14,252	200		14,452
	Total 99100 - Indirect Cost	**14,252**	**200**	**-**	**14,452**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
Avondale SDA					
141-2-103-9010-5-71100-539990-0000-0000-103	Contracted Services	2,614			2,614
	Total 71100 - Regular Instruction	**2,614**	**-**	**-**	**2,614**
	Total Avondale SDA	**2,614**	**-**	**-**	**2,614**
Chattanooga Christian					
141-2-103-9045-5-72130-539990-0000-0000-103	Contracted Services	1,546			1,546
	Total 72130 - Other Student Support	**1,546**	**-**	**-**	**1,546**
	Total Chattanooga Christian	**1,546**	**-**	**-**	**1,546**
141-2-103-9115-5-72130-539990-0000-0000-103	Contracted Services	2,968			2,968
	Total 72130 - Other Student Support	**2,968**	**-**		**2,968**
	Total OLPH	**2,968**	**-**	**-**	**2,968**
Annoor					
141-2-103-9181-5-71100-539990-0000-0000-103	Contracted Services	-	2,314		2,314
141-2-103-9181-5-71100-542910-0000-0000-103	Instructional Supplies	2,314		(2,314)	-
	Total 71100 - Regular Instruction	**2,314**	**2,314**	**(2,314)**	**2,314**
	Total Annoor	**2,314**	**2,314**	**(2,314)**	**2,314**
Beacon					
141-2-103-9823-5-71100-539990-0000-0000-103	Contracted Services	-	361		361
141-2-103-9823-5-71100-547110-0000-0000-103	Software	361		(361)	-
	Total 71100 - Regular Instruction	**361**	**361**	**(361)**	**361**
	Total Beacon	**361**	**361**	**(361)**	**361**
Mission Montessori					
141-2-103-9941-5-71100-539990-0000-0000-103	Contracted Services	721			721
	Total 71100 - Regular Instruction	**721**	**-**	**-**	**721**
	Total Mission Montessori	**721**	**-**	**-**	**721**
	TOTAL BUDGET	**1,029,730**	**152,927**	**(149,577)**	**1,033,080**

HAMILTON COUNTY DEPARTMENT OF EDUCATION
FEDERAL PROGRAMS
TITLE IV, PART A: STUDENT SUPPORT AND ACADEMIC ENRICHMENT GRANT
BUDGET FISCAL YEAR 2025-2026

	2026 Award	1,160,468			1,160,468
	2025 Carryover	245,109			245,109
	Transfer to Consolidated Administration	(100)			(100)
	Total Source of Funds	**1,405,477**	**-**	**-**	**1,405,477**

SOURCE OF FUNDS SUMMARY

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-104-0000-0-00000-471470-0000-0000-104	Revenue	1,405,477			1,405,477
	Total Source of Funds	**1,405,477**	**-**	**-**	**1,405,477**

USE OF FUNDS SUMMARY

71100	Regular Instruction	399,070	21,408	(8,838)	411,640
72130	Other Student Support	52,792	41,225	-	94,017
72210	Regular Instruction Support	898,065	3,488	(63,283)	838,270
72710	Transportation	32,977	6,000	-	38,977
99100	Indirect Cost	22,573	-	-	22,573
	Total Use of Funds	**1,405,477**	**72,121**	**(72,121)**	**1,405,477**

USE OF FUNDS DETAIL

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-104-0000-0-99100-550410-0000-0000-104	Indirect Cost (3.06%)	22,573			22,573
	Total 99100 - Indirect Cost	**22,573**	**-**	**-**	**22,573**
141-2-104-6000-0-71100-542910-0000-410S-104	Instructional Materials COMP SH	2,750			2,750
141-2-104-6000-0-71100-547110-0000-410W-104	Software WR	68,000		(930)	67,070
	Total 71100 - Regular Instruction	**70,750**	**-**	**(930)**	**69,820**
141-2-104-6000-0-72130-532210-0000-410W-104	Evaluation & Testing	39,628	41,225		80,853
	Total 72130 - Other Student Support	**39,628**	**41,225**	**-**	**80,853**
141-2-104-0000-0-72210-510530-PBEN-410S-104	Coordinator SH (1 FTE)	108,000		(6,696)	101,304
141-2-104-0000-0-72210-518810-0000-410S-104	Bonus	2,000			2,000
141-2-104-0000-0-72210-519610-0000-410S-104	In-Service Stipends - COMP (NTN) SH	27,572			27,572
141-2-104-0000-0-72210-520110-0000-410S-104	Social Security SH	8,530		(415)	8,115
141-2-104-0000-0-72210-520410-0000-410S-104	State Retirement SH	12,381		(626)	11,755
141-2-104-0000-0-72210-520610-0000-410S-104	Life Insurance SH	40			40
141-2-104-0000-0-72210-520710-0000-410S-104	Health Insurance SH	13,320	20		13,340
141-2-104-0000-0-72210-520810-0000-410S-104	Dental Insurance SH	294	2		296
141-2-104-0000-0-72210-521010-0000-410S-104	Unemployment Compensation SH	14	2		16
141-2-104-0000-0-72210-521210-0000-410S-104	Medicare SH	1,995		(97)	1,898
141-2-104-0000-0-72210-529910-0000-410S-104	Long Term Disability SH	107			107
141-2-104-0000-0-72210-529930-0000-410S-104	Short Term Disability SH	116			116
141-2-104-0000-0-72210-552410-0000-410S-104	Staff Development SH	117,870		(6,000)	111,870
	Total 72210 - Regular Instruction Support	**292,239**	**24**	**(13,834)**	**278,429**
141-2-104-6000-0-72710-531410-0000-410W-104	Contracts with Public Carriers WR	12,000	5,000		17,000
	Total 72710 - Transportation	**12,000**	**5,000**	**-**	**17,000**
	Total	**414,617**	**46,249**	**(14,764)**	**446,102**
Fine Arts (Well Rounded)					
141-2-104-6000-0-71100-539980-0000-411W-104	Contract Substitutes	5,000			5,000
141-2-104-6000-0-71100-542910-0000-411W-104	Instructional Materials	7,280			7,280
	Total 71100 - Regular Instruction	**12,280**	**-**	**-**	**12,280**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-104-0000-0-72210-518810-0000-411W-104	Bonus	2,000			2,000
141-2-104-0000-0-72210-5189K0-PBEN-411W-104	District Content Lead (1 FTE)	89,000		(2,774)	86,226
141-2-104-0000-0-72210-519610-0000-411W-104	In-Service Stipends	16,360			16,360
141-2-104-0000-0-72210-520110-0000-411W-104	Social Security	6,656		(171)	6,485
141-2-104-0000-0-72210-520410-0000-411W-104	State Retirement	9,662		(1,295)	8,367
141-2-104-0000-0-72210-520610-0000-411W-104	Life Insurance	40			40
141-2-104-0000-0-72210-520710-0000-411W-104	Health Insurance	13,320			13,320
141-2-104-0000-0-72210-520810-0000-411W-104	Dental Insurance	294			294
141-2-104-0000-0-72210-521010-0000-411W-104	Unemployment Compensation	14			14
141-2-104-0000-0-72210-521210-0000-411W-104	Medicare	1,557		(40)	1,517
141-2-104-0000-0-72210-529910-0000-411W-104	Long Term Disability	107			107
141-2-104-0000-0-72210-529930-0000-411W-104	Short Term Disability	116			116
141-2-104-0000-0-72210-552410-0000-411W-104	Staff Development	17,000		(500)	16,500
	Total 72210 - Regular Instruction Support	**156,126**	**-**	**(4,780)**	**151,346**
141-2-104-6000-0-72710-531410-0000-411W-104	Contracts with Public Carriers	20,000			20,000
	Total 72710 - Transportation	**20,000**	**-**	**-**	**20,000**
	Total Fine Arts Well Rounded	**188,406**	**-**	**(4,780)**	**183,626**
Social Studies (Well Rounded)					
141-2-104-6000-0-71100-542910-0000-412W-104	Instructional Materials	14,971			14,971
	Total 71100 - Regular Instruction	**14,971**	**-**	**-**	**14,971**
141-2-104-0000-0-72210-518810-0000-412W-104	Bonus	2,000			2,000
141-2-104-0000-0-72210-5189K0-PBEN-412W-104	District Content Lead (1 FTE)	94,000		(5,831)	88,169
141-2-104-0000-0-72210-519610-0000-412W-104	In-Service Stipends	7,243	3,459		10,702
141-2-104-0000-0-72210-520110-0000-412W-104	Social Security	6,401		(146)	6,255
141-2-104-0000-0-72210-520410-0000-412W-104	State Retirement	9,292		(1,222)	8,070
141-2-104-0000-0-72210-520610-0000-412W-104	Life Insurance	40			40
141-2-104-0000-0-72210-520710-0000-412W-104	Health Insurance	13,320			13,320
141-2-104-0000-0-72210-520810-0000-412W-104	Dental Insurance	294			294
141-2-104-0000-0-72210-521010-0000-412W-104	Unemployment Compensation	14			14
141-2-104-0000-0-72210-521210-0000-412W-104	Medicare	1,497		(34)	1,463
141-2-104-0000-0-72210-529910-0000-412W-104	Long Term Disability	107			107
141-2-104-0000-0-72210-529930-0000-412W-104	Short Term Disability	116			116
141-2-104-0000-0-72210-552410-0000-412W-104	Staff Development	25,000		(4,500)	20,500
	Total 72210 - Regular Instruction Support	**159,324**	**3,459**	**(11,733)**	**151,050**
	Total Social Studies	**174,295**	**3,459**	**(11,733)**	**166,021**
STEM (Well Rounded)					
141-2-104-6000-0-71100-542910-0000-413W-104	Instructional Materials	43,877			43,877
	Total 71100 - Regular Instruction	**43,877**	**-**	**-**	**43,877**
141-2-104-0000-0-72210-518810-0000-413W-104	Bonus	2,000			2,000
141-2-104-0000-0-72210-5189K0-PBEN-413W-104	District Content Lead STEM (1 FTE)	97,000		(6,405)	90,595
141-2-104-0000-0-72210-519610-0000-413W-104	In-Service Stipends	8,000			8,000
141-2-104-0000-0-72210-520110-0000-413W-104	Social Security	6,634		(397)	6,237
141-2-104-0000-0-72210-520410-0000-413W-104	State Retirement	9,630		(1,552)	8,078
141-2-104-0000-0-72210-520610-0000-413W-104	Life Insurance	40			40
141-2-104-0000-0-72210-520710-0000-413W-104	Health Insurance	13,320			13,320
141-2-104-0000-0-72210-520810-0000-413W-104	Dental Insurance	294			294
141-2-104-0000-0-72210-521010-0000-413W-104	Unemployment Compensation	14			14
141-2-104-0000-0-72210-521210-0000-413W-104	Medicare	1,553		(92)	1,461
141-2-104-0000-0-72210-529910-0000-413W-104	Long Term Disability	107			107
141-2-104-0000-0-72210-529930-0000-413W-104	Short Term Disability	116			116
141-2-104-0000-0-72210-552410-0000-413W-104	Staff Development	18,000		(1,000)	17,000
	Total 72210 - Regular Instruction Support	**156,708**	**-**	**(9,446)**	**147,262**
	Total STEM	**200,585**	**-**	**(9,446)**	**191,139**
Innovation (Well Rounded)					
141-2-104-6000-0-71100-542910-0000-414W-104	Instructional Materials	5,000	17,500		22,500
141-2-104-0000-0-71100-547110-0000-414W-104	Software	4,000		(4,000)	-
	Total 71100 - Regular Instruction	**9,000**	**17,500**	(4,000)	**22,500**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-104-0000-0-72210-513820-PBEN-414W-104	Tech Int/Innov Coach (.75 FTE)	57,750		(5,457)	52,293
141-2-104-0000-0-72210-513820-PBEN-414E-104	Tech Int/Innov Coach (.25 FTE)	19,250		(1,819)	17,431
141-2-104-0000-0-72210-520110-0000-414W-104	Social Security	3,581		(338)	3,243
141-2-104-0000-0-72210-520110-0000-414E-104	Social Security	1,194		(112)	1,082
141-2-104-0000-0-72210-520410-0000-414W-104	State Retirement	5,197		(494)	4,703
141-2-104-0000-0-72210-520410-0000-414E-104	State Retirement	1,733		(165)	1,568
141-2-104-0000-0-72210-520610-0000-414W-104	Life Insurance	30			30
141-2-104-0000-0-72210-520610-0000-414E-104	Life Insurance	10			10
141-2-104-0000-0-72210-520710-0000-414W-104	Health Insurance	9,990			9,990
141-2-104-0000-0-72210-520710-0000-414E-104	Health Insurance	3,330			3,330
141-2-104-0000-0-72210-520810-0000-414W-104	Dental Insurance	221	3		224
141-2-104-0000-0-72210-520810-0000-414E-104	Dental Insurance	73	1		74
141-2-104-0000-0-72210-521010-0000-414W-104	Unemployment Compensation	11			11
141-2-104-0000-0-72210-521010-0000-414E-104	Unemployment Compensation	3	1		4
141-2-104-0000-0-72210-521210-0000-414W-104	Medicare	838		(79)	759
141-2-104-0000-0-72210-521210-0000-414E-104	Medicare	280		(26)	254
141-2-104-0000-0-72210-529910-0000-414W-104	Long Term Disability	80			80
141-2-104-0000-0-72210-529930-0000-414W-104	Short Term Disability	87			87
141-2-104-0000-0-72210-529910-0000-414E-104	Long Term Disability	27			27
141-2-104-0000-0-72210-529930-0000-414E-104	Short Term Disability	29			29
141-2-104-0000-0-72210-552410-0000-414W-104	Staff Development WR	15,000		(15,000)	-
	Total 72210 - Regular Instruction Support	**118,714**	**5**	**(23,490)**	**95,229**
141-2-104-6000-0-72710-531410-0000-414W-104	Contracts with Public Carriers	-	1,000		1,000
	Total 72710 - Transportation	**-**	**1,000**	**-**	**1,000**
	Total Innovation	**127,714**	**18,505**	**(27,490)**	**118,729**
	Total District	**1,105,617**	**68,213**	**(68,213)**	**1,105,617**
PRIVATE SCHOOLS					
Avondale SDA					
141-2-104-9010-5-71100-542910-0000-000W-104	Instructional Materials WR	2,450	188		2,638
141-2-104-9010-5-71100-547110-0000-000W-104	Software WR	188		(188)	-
	Total 71100 - Regular Instruction	**2,638**	**188**	**(188)**	**2,638**
	Total Avondale SDA	**2,638**	**188**	**(188)**	**2,638**
Brainerd Baptist					
141-2-104-9030-5-71100-539990-0000-000W-104	Contracted Services WR	2,400			2,400
141-2-104-9030-5-71100-542910-0000-000W-104	Instructional Materials WR	1,500	294		1,794
141-2-104-9030-5-71100-547110-0000-000W-104	Software WR	2,292		(294)	1,998
	Total 71100 - Regular Instruction	**6,192**	**294**	**(294)**	**6,192**
	Total Brainerd Baptist	**6,192**	**294**	**(294)**	**6,192**
Chattanooga Christian					
141-2-104-9045-5-71100-539990-0000-000W-104	Contracted Services WR	36,037			36,037
	Total 71100 - Regular Instruction	**36,037**	**-**	**-**	**36,037**
	Total Chattanooga Christian	**36,037**	**-**	**-**	**36,037**
Montessori School					
141-2-104-9066-5-71100-539990-0000-000W-104	Contracted Services WR	1,000			1,000
141-2-104-9066-5-71100-559990-0000-000W-104	Other charges: field experiences WR	945			945
	Total 71100 - Regular Instruction	**1,945**	**-**	**-**	**1,945**
141-2-104-9066-5-72710-531410-0000-000W-104	Contracts with Public Carriers WR	977			977
	Total 72710 - Transportation	**977**	**-**	**-**	**977**
	Total Montessori School	**2,922**	**-**	**-**	**2,922**
Notre Dame					
141-2-104-9325-5-71100-533610-0000-000W-104	Maintenance and Repair Equipment WR	328			328
141-2-104-9325-5-71100-535610-0000-000W-104	Tuition	1,750			1,750
141-2-104-9325-5-71100-542910-0000-000W-104	Instructional Materials WR	7,856			7,856
	Total 71100 - Regular Instruction	**9,934**	**-**	**-**	**9,934**
	Total Notre Dame	**9,934**	**-**	**-**	**9,934**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
Saint Jude					
141-2-104-9140-5-71100-547110-0000-000W-104	Software WR	6,680			6,680
	Total 71100 - Regular Instruction	**6,680**	**-**	**-**	**6,680**
	Total Saint Jude	**6,680**	**-**	**-**	**6,680**
Silverdale Baptist					
141-2-104-9081-5-71100-542910-0000-000W-104	Instructional Materials WR	13,910			13,910
141-2-104-9081-5-71100-547110-0000-000W-104	Software WR	12,655			12,655
	Total 71100 - Regular Instruction	**26,565**	**-**	**-**	**26,565**
	Total Silverdale Baptist	**26,565**	**-**	**-**	**26,565**
Grace Baptist					
141-2-104-9007-5-71100-542910-0000-000W-104	Instructional Materials WR	4,608			4,608
141-2-104-9007-5-71100-547110-0000-000W-104	Software WR	10,500			10,500
	Total 71100 - Regular Instruction	**15,108**	**-**	**-**	**15,108**
	Total Grace Baptist	**15,108**	**-**	**-**	**15,108**
Annoor Academy					
141-2-104-9181-5-71100-547110-0000-000W-104	Software WR	1,769			1,769
	Total 71100 - Regular Instruction	**1,769**	**-**	**-**	**1,769**
	Total Annoor Academy	**1,769**	**-**	**-**	**1,769**
Collegedale Academy					
141-2-104-9110-5-71100-542910-0000-000W-104	Instructional Materials WR	16,690			16,690
141-2-104-9110-5-71100-547110-0000-000W-104	Software WR	2,050			2,050
	Total 71100 - Regular Instruction	**18,740**	**-**	**-**	**18,740**
	Total Collegedale Academy	**18,740**	**-**	**-**	**18,740**
Belvoir Christian Academy					
141-2-104-9090-5-71100-547110-0000-000W-104	Software WR	2,684			2,684
	Total 71100 - Regular Instruction	**2,684**	**-**	**-**	**2,684**
	Total Belvoir Christian Academy	**2,684**	**-**	**-**	**2,684**
Boyd-Buchanan					
141-2-104-9025-5-71100-539990-0000-000W-104	Contracted Services WR	10,000			10,000
141-2-104-9025-5-71100-542910-0000-000W-104	Instructional Materials WR	12,974			12,974
141-2-104-9025-5-71100-547110-0000-000W-104	Software WR	3,112			3,112
	Total 71100 - Regular Instruction	**26,086**	**-**	**-**	**26,086**
	Total Boyd-Buchanan	**26,086**	**-**	**-**	**26,086**
Bright School					
141-2-104-9035-5-71100-539990-0000-000W-104	Contracted Services WR	6,202			6,202
	Total 71100 - Regular Instruction	**6,202**	**-**	**-**	**6,202**
	Total Bright School	**6,202**	**-**	**-**	**6,202**
Hickory Valley Christian School					
141-2-104-9075-5-71100-539990-0000-000W-104	Contracted Services WR	1,975			1,975
	Total 71100 - Regular Instruction	**1,975**	**-**	**-**	**1,975**
	Total Hickory Valley Christian School	**1,975**	**-**	**-**	**1,975**
OLPH					
141-2-104-9115-5-71100-539990-0000-000W-104	Contracted Services WR	4,125			4,125
141-2-104-9115-5-71100-547110-0000-000W-104	Software WR	3,345			3,345
141-2-104-9115-5-71100-542910-0000-000W-104	Instructional Materials WR	2,976			2,976
	Total 71100 - Regular Instruction	**10,446**	**-**	**-**	**10,446**
141-2-104-9115-5-72210-539990-0000-000W-104	Contracted Services WR	2,000			2,000
	Total 72210 - Regular Instruction Support	**2,000**	**-**	**-**	**2,000**
	Total OLPH	**12,446**	**-**	**-**	**12,446**
Berean Academy					
141-2-104-9020-5-71100-542910-0000-000W-104	Instructional Materials WR	14,018			14,018
	Total 71100 - Regular Instruction	**14,018**	**-**	**-**	**14,018**
	Total Berean Academy	**14,018**	**-**	**-**	**14,018**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
Skyuka Hall					
141-2-104-9120-5-71100-539990-0000-000S-104	Contracted Services SH	2,000			2,000
141-2-104-9120-5-71100-542910-0000-000W-104	Instructional Materials WR	-			-
	Total 71100 - Regular Instruction	**2,000**	**-**	**-**	**2,000**
141-2-104-9120-5-72130-539990-0000-000S-104	Contracted Services SH	1,525			1,525
	Total 72130 - Other Student Support	**1,525**	**-**	**-**	**1,525**
	Total Skyuka Hall	**3,525**	**-**	**-**	**3,525**
St. Nicholas					
141-2-104-9145-5-71100-539990-0000-000W-104	Contracted Services WR	2,569			2,569
	Total 71100 - Regular Instruction	**2,569**	**-**	**-**	**2,569**
	Total St Nicholas	**2,569**	**-**	**-**	**2,569**
St. Peter's					
141-2-104-9147-5-71100-539990-0000-000W-104	Contracted Services WR	10,601			10,601
	Total 71100 - Regular Instruction	**10,601**	**-**	**-**	**10,601**
	Total St Peter's	**10,601**	**-**	**-**	**10,601**
Beacon Academy					
141-2-104-9823-5-71100-539990-0000-000W-104	Contracted Services WR	1,487			1,487
	Total 71100 - Regular Instruction	**1,487**	**-**	**-**	**1,487**
	Total Beacon Academy	**1,487**	**-**	**-**	**1,487**
Redemption Point					
141-2-104-9898-5-71100-547110-0000-000W-104	Software	2,790			2,790
	Total 71100 - Regular Instruction	**2,790**	**-**	**-**	**2,790**
	Total Redemption Point	**2,790**	**-**	**-**	**2,790**
Mission Montessori					
141-2-104-9941-5-71100-539990-0000-000W-104	Contracted Services	285			285
	Total 71100 - Regular Instruction	**285**	**-**	**-**	**285**
	Total Mission Montessori	**285**	**-**	**-**	**285**
	Total Private Schools	**211,253**	**482**	**(482)**	**211,253**
CHARTER SCHOOLS					
Chattanooga Preparatory School					
141-2-104-8011-8-72130-532210-0000-000W-104	Evaluation and Testing	11,639			11,639
	Total 72130 - Other Student Support	**11,639**	**-**	**-**	**11,639**
	Total Chattanooga Preparatory School	**11,639**	**-**	**-**	**11,639**
Chattanooga Girls Leadership Academy					
141-2-104-8001-8-72210-552410-0000-000W-104	Staff Development WR	7,818			7,818
	Total 72210 - Regular Instruction Support	**7,818**	**-**	**-**	**7,818**
	Total Chattanooga Girls Leadership Academy	**7,818**	**-**	**-**	**7,818**
Ivy Academy					
141-2-104-8002-8-71100-542910-0000-000W-104	Instructional Materials WR	8,216			8,216
141-2-104-8002-8-71100-559990-0000-000W-104	Other Charges WR	2,500			2,500
	Total 71100 - Regular Instruction	**10,716**	**-**	**-**	**10,716**
	Total Ivy Academy	**10,716**	**-**	**-**	**10,716**
Chattanooga Charter School of Excellence					
141-2-104-8003-8-71100-542910-0000-000W-104	Instructional Materials WR	7,211			7,211
141-2-104-8003-8-71100-559990-0000-000W-104	Other Charges	3,000			3,000
	Total 71100 - Regular Instruction	**10,211**	**-**	**-**	**10,211**
	Total Chattanooga Charter School of Excellence	**10,211**	**-**	**-**	**10,211**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
Skillern Elementary School					
141-2-104-8005-8-71100-559990-0000-000W-104	Other Charges WR	6,149			6,149
	Total 71100 - Regular Instruction	**6,149**	**-**	**-**	**6,149**
	Total Skillern Elementary	**6,149**	**-**	**-**	**6,149**
Chatt Academy Community School					
141-2-104-8006-8-71100-539990-0000-000W-104	Contracted Services WR	3,426		(3,426)	-
141-2-104-8006-8-71100-539990-0000-000S-104	Contracted Services SH	-	3,426		3,426
	Total 71100 - Regular Instruction	**3,426**	**3,426**	**(3,426)**	**-**
	Total Chatt Academy Community School	**3,426**	**3,426**	**(3,426)**	**-**
Chattanooga Charter School of Excellence Middle					
141-2-104-8010-8-71100-542910-0000-000W-104	Instructional Materials WR	5,358			5,358
	Total 71100 - Regular Instruction	**5,358**	**-**	**-**	**5,358**
	Total Chattanooga Charter School of Excellence Mi	**5,358**	**-**	**-**	**5,358**
Chattanooga Charter School of Excellence High					
141-2-104-8015-8-71100-542910-0000-000W-104	Instructional Materials WR	3,558			3,558
	Total 71100 - Regular Instruction	**3,558**	**-**	**-**	**3,558**
	Total Chattanooga Charter School of Excellence Hi	**3,558**	**-**	**-**	**3,558**
Montessori Elementary Charter					
141-2-104-8142-8-71100-542910-0000-000W-104	Instructional Materials WR	823			823
141-2-104-8142-8-71100-559990-0000-000W-104	Other Charges WR	1,200			1,200
	Total 71100 - Regular Instruction	**2,023**	**-**	**-**	**2,023**
141-2-104-8142-8-72210-552410-0000-000W-104	Staff Development	5,136			5,136
	Total 72210 - Regular Instruction Support	**5,136**	**-**	**-**	**5,136**
	Total Montessori Elementary Charter	**7,159**	**-**	**-**	**7,159**
	Total Charter Schools	**66,034**	**3,426**	**(3,426)**	**62,608**
	TOTAL BUDGET	**1,405,477**	**72,121**	**(72,121)**	**1,402,051**

HAMILTON COUNTY DEPARTMENT OF EDUCATION
FEDERAL PROGRAMS
TITLE I, PART A: LOCAL NEGLECTED
BUDGET FISCAL YEAR 2025-2026

	2026 Award	232,016	141		232,157
	2025 Carryover	52,610			52,610
	Transfer to Consolidated Administration	(16,094)			(16,094)
	Total Source of Funds	**268,532**	**141**	**-**	**268,673**

SOURCE OF FUNDS SUMMARY

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-110-0000-0-00000-471410-0000-0000-110	Revenue	268,532	141		268,673
	Total Source of Funds	**268,532**	**141**	**-**	**268,673**

USE OF FUNDS SUMMARY

71100	Regular Instruction	193,450	136	-	193,586
72210	Instructional Support	67,110	-	-	67,110
99100	Indirect Cost	7,972	5	-	7,977
	Total Use of Funds	**268,532**	**141**	**-**	**268,673**

USE OF FUNDS DETAIL

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
Parkridge Valley					
141-2-110-9160-5-71100-539990-0000-0000-110	Contracted Services	65,953			65,953
141-2-110-9160-5-71100-542910-0000-0000-110	Instructional Supplies	7,054	136		7,190
141-2-110-9160-5-71100-559990-0000-0000-110	Other Charges	36,000			36,000
	Total 71100 - Regular Instruction	**109,007**	**136**	**-**	**109,143**
141-2-110-9160-5-72210-552410-0000-0000-110	Staff Development	8,000			8,000
141-2-110-9160-5-72210-559990-0000-0000-110	Other Charges-Transition Sp	39,000			39,000
	Total 72210 - Regular Instruction Support	**47,000**	**-**	**-**	**47,000**
141-2-110-9160-5-99100-550410-0000-0000-110	Indirect Cost (3.06%)	4,773	5		4,778
	Total 99100 - Indirect Cost	**4,773**	**5**	**-**	**4,778**
	Total Parkridge Valley	**160,780**	**141**	**-**	**160,921**
Bethel Christian Academy					
141-2-110-9180-5-71100-539990-0000-0000-110	Other Contracted Services	31,250			31,250
141-2-110-9180-5-71100-542910-0000-0000-110	Instructional Supplies	1,600			1,600
141-2-110-9180-5-71100-559990-0000-0000-110	Other Charges	51,593			51,593
	Total 71100 - Regular Instruction	**84,443**	**-**	**-**	**84,443**
141-2-110-9180-5-72210-552410-0000-0000-110	Staff Development	8,000			8,000
141-2-110-9180-5-72210-559990-0000-0000-110	Other Charges	12,110			12,110
	Total 72210 - Regular Instruction Support	**20,110**	**-**	**-**	**20,110**
141-2-110-9180-5-99100-550410-0000-0000-110	Indirect Cost (3.06%)	3,199			3,199
	Total 99100 - Indirect Cost	**3,199**	**-**	**-**	**3,199**
	Total Bethel Christian Academy	**107,752**	**-**	**-**	**107,752**
	TOTAL BUDGET	**268,532**	**141**	**-**	**268,673**

HAMILTON COUNTY DEPARTMENT OF EDUCATION
FEDERAL PROGRAMS
TITLE I, PART D: DELINQUENT
BUDGET FISCAL YEAR 2025-2026

	2026 Award	108,816	27		108,843
	2025 Carryover	20,373			20,373
	Transfer to Consolidated Administration	(11,245)			(11,245)
	Total Source of Funds	**117,944**	**27**	**-**	**117,971**

SOURCE OF FUNDS SUMMARY

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-111-0000-0-00000-471410-0000-0000-111	Revenue	117,944	27		117,971
	Total Source of Funds	**117,944**	**27**	**-**	**117,971**

USE OF FUNDS SUMMARY

71100	Regular Instruction	93,244	327	(8,000)	85,571
72210	Instructional Support	21,200	8,000	(300)	28,900
99100	Indirect Cost	3,500	-	-	3,500
	Total Use of Funds	**117,944**	**8,327**	**(8,300)**	**117,971**

USE OF FUNDS DETAIL

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 11/20/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
CADAS-Scholze Center					
141-2-111-9265-5-71100-542910-0000-0000-111	Instructional Supplies	11,795	327		12,122
141-2-111-9265-5-71100-547110-0000-0000-111	Software	5,449			5,449
141-2-111-9265-5-71100-559990-0000-0000-111	Other Charges	76,000		(8,000)	68,000
	Total 71100 - Regular Instruction	**93,244**	**327**	**(8,000)**	**85,571**
141-2-111-9265-5-72210-552410-0000-0000-111	Staff Development	21,200		(300)	20,900
141-2-111-9265-5-72210-559990-0000-0000-111	Other Charges	-	8,000		8,000
	Total 72210 - Regular Instruction Support	**21,200**	**8,000**	**(300)**	**28,900**
141-2-111-9265-5-99100-550410-0000-0000-111	Indirect Cost (3.06%)	3,500			3,500
	Total 99100 - Indirect Cost	**3,500**	**-**	**-**	**3,500**
	Total CADAS-Scholze Center	**117,944**	**8,327**	**(8,300)**	**117,971**
	TOTAL BUDGET	**117,944**	**8,327**	**(8,300)**	**117,971**

HAMILTON COUNTY DEPT OF EDUCATION
FEDERAL PROGRAMS
TURNAROUND ACTION GRANT V
BUDGET FISCAL YEAR 2025-2026

SOURCE OF FUNDS SUMMARY

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 9/18/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-115-0000-0-00000-471410-0000-0000-115	FY25 Carryover	799,145			799,145
	Total Source of Funds	**799,145**	**-**	**-**	**799,145**

USE OF FUNDS SUMMARY

71100	Regular Instruction	172,819	17,191	(288)	189,722
72130	Other Student Support	190,595	261	(4,650)	186,206
72210	Instructional Support	412,003	103	(12,617)	399,489
99100	Indirect Cost	23,728	-	-	23,728
	Total Use of Funds	**799,145**	**17,555**	**(17,555)**	**799,145**

USE OF FUNDS DETAIL

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 9/18/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
District Level					
141-2-115-0000-0-99100-550410-0000-0000-115	Indirect Cost (3.06%)	20,550			20,550
	Total 99100 - Indirect Cost	**20,550**	**-**	**-**	**20,550**
	Total District Level	**20,550**	**-**	**-**	**20,550**
MidTown Learning Community					
Donaldson, Hardy, Orchard Knob Elementary, Dalewood Middle, Orchard Knob Middle					
141-2-115-6002-0-72130-512310-PBEN-0000-115	Lead Counselor .5 FTE	42,623			42,623
141-2-115-6002-0-72130-518980-PBEN-0000-115	Student Support Coach .5 FTE	24,038		(1)	24,037
141-2-115-6002-0-72130-518980-0000-0000-115	Student Support Coach Supplemental Pay	3,588		(3,588)	-
141-2-115-6002-0-72130-520110-0000-0000-115	Social Security	4,355		(471)	3,884
141-2-115-6002-0-72130-520410-0000-0000-115	Retirement	4,570		(274)	4,296
141-2-115-6002-0-72130-520610-PBEN-0000-115	Life Insurance	40			40
141-2-115-6002-0-72130-520710-PBEN-0000-115	Health Insurance	13,320		(50)	13,270
141-2-115-6002-0-72130-520810-PBEN-0000-115	Dental Insurance	294			294
141-2-115-6002-0-72130-521010-PBEN-0000-115	Unemployment Compensation	14			14
141-2-115-6002-0-72130-521210-0000-0000-115	Medicare	1,019		(111)	908
141-2-115-6002-0-72130-529910-PBEN-0000-115	Long Term Disability	107		(5)	102
141-2-115-6002-0-72130-529930-PBEN-0000-115	Short Term Disability	116		(5)	111
141-2-115-6002-0-72130-535510-0000-0000-115	Travel - In Town Mileage	1,809			1,809
	Total 72130 - Other Student Support	**95,893**	**-**	**(4,505)**	**91,388**
141-2-115-6002-0-72210-514100-0000-0000-115	MT Diff Comp	31,378			31,378
141-2-115-6002-0-72210-517210-PBEN-0000-115	MT New Teacher Coach .5 FTE	41,407			41,407
141-2-115-6002-0-72210-5189D0-PBEN-0000-115	MT ELA Content Lead K-5 .5 FTE	49,298		(700)	48,598
141-2-115-6002-0-72210-5189D0-PBEN-0000-115	MT ELA Content Lead 6-12 .25 FTE	16,942			16,942
141-2-115-6002-0-72210-5189D0-PBEN-0000-115	MT Math Content Lead K-5 .5 FTE	37,038			37,038
141-2-115-6002-0-72210-5189D0-PBEN-0000-115	MT Math Content Lead 6-12 .5 FTE	41,407			41,407
141-2-115-6002-0-72210-5189D0-0000-0000-115	District Content Lead Supplemental Pay	8,641		(8,641)	-
141-2-115-6002-0-72210-520110-0000-0000-115	Social Security	13,609		(846)	12,763
141-2-115-6002-0-72210-520410-0000-0000-115	Retirement	14,696		(660)	14,036
141-2-115-6002-0-72210-520610-PBEN-0000-115	Life Insurance	90		(2)	88
141-2-115-6002-0-72210-520710-PBEN-0000-115	Health Insurance	29,970	103		30,073
141-2-115-6002-0-72210-520810-PBEN-0000-115	Dental Insurance	662			662
141-2-115-6002-0-72210-521010-PBEN-0000-115	Unemployment Compensation	32			32
141-2-115-6002-0-72210-521210-0000-0000-115	Medicare	3,280		(361)	2,919
141-2-115-6002-0-72210-529910-PBEN-0000-115	Long Term Disability	241		(12)	229
141-2-115-6002-0-72210-529930-PBEN-0000-115	Short Term Disability	261		(11)	250
141-2-115-6002-0-72210-535510-0000-0000-115	Travel - In Town Mileage	2,500			2,500
	Total 72210 - Instructional Support	**291,452**	**103**	**(11,233)**	**280,322**
	Total MidTown - District Level	**387,345**	**103**	**(15,738)**	**371,710**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 9/18/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
Dalewood Middle					
141-5-115-0055-2-72130-5189G0-PBEN-0000-115	Behavior Management Specialist .77 FTE	32,147			32,147
141-5-115-0055-2-72130-520110-PBEN-0000-115	Social Security	1,993		(48)	1,945
141-5-115-0055-2-72130-520410-PBEN-0000-115	Retirement	2,456			2,456
141-5-115-0055-2-72130-520610-PBEN-0000-115	Life Insurance	31			31
141-5-115-0055-2-72130-520710-PBEN-0000-115	Health Insurance	10,277	256		10,533
141-5-115-0055-2-72130-520810-PBEN-0000-115	Dental Insurance	227	5		232
141-5-115-0055-2-72130-521010-PBEN-0000-115	Unemployment Compensation	11			11
141-5-115-0055-2-72130-521210-PBEN-0000-115	Medicare	467		(12)	455
141-5-115-0055-2-72130-529910-PBEN-0000-115	Long Term Disability	83		(2)	81
141-5-115-0055-2-72130-529930-PBEN-0000-115	Short Term Disability	90		(5)	85
	Total 72130 - Other Student Support	**47,782**	**261**	**(67)**	**47,976**
	Total School	**47,782**	**261**	**(67)**	**47,976**
Orchard Knob Middle					
141-2-115-0200-2-71100-5116H0-PBEN-0000-115	Teacher - Intervention 1 FTE	43,940	13,243		57,183
141-2-115-0200-2-71100-520110-PBEN-0000-115	Social Security	2,725	821		3,546
141-2-115-0200-2-71100-520410-PBEN-0000-115	Retirement	3,544	1,025		4,569
141-2-115-0200-2-71100-520610-PBEN-0000-115	Life Insurance	23	4		27
141-2-115-0200-2-71100-520710-PBEN-0000-115	Health Insurance	7,687	1,621		9,308
141-2-115-0200-2-71100-520810-PBEN-0000-115	Dental Insurance	170	35		205
141-2-115-0200-2-71100-521010-PBEN-0000-115	Unemployment Compensation	8	1		9
141-2-115-0200-2-71100-521210-PBEN-0000-115	Medicare	637	193		830
141-2-115-0200-2-71100-529910-PBEN-0000-115	Long Term Disability	61	8		69
141-2-115-0200-2-71100-529930-PBEN-0000-115	Short Term Disability	68	7		75
	Total 71100 - Regular Instruction	**58,863**	**16,958**	**-**	**75,821**
	Total School	**58,863**	**16,958**	**-**	**75,821**
Hardy Elementary					
141-2-115-0110-1-71100-516310-PBEN-0000-115	Educational Assistant 1 FTE	39,718			39,718
141-2-115-0110-1-71100-520110-PBEN-0000-115	Social Security	2,463		(213)	2,250
141-2-115-0110-1-71100-520410-PBEN-0000-115	Retirement	3,034	142		3,176
141-2-115-0110-1-71100-520610-PBEN-0000-115	Life Insurance	62		(2)	60
141-2-115-0110-1-71100-520710-PBEN-0000-115	Health Insurance	20,554	90		20,644
141-2-115-0110-1-71100-520810-PBEN-0000-115	Dental Insurance	454	1		455
141-2-115-0110-1-71100-521010-PBEN-0000-115	Unemployment Compensation	22			22
141-2-115-0110-1-71100-521210-PBEN-0000-115	Medicare	576		(50)	526
141-2-115-0110-1-71100-529910-PBEN-0000-115	Long Term Disability	166		(12)	154
141-2-115-0110-1-71100-529930-PBEN-0000-115	Short Term Disability	180		(11)	169
	Total 71100 - Regular Instruction	**67,229**	**233**	**(288)**	**67,174**
141-2-115-0110-1-72130-5189G0-PBEN-0000-115	Behavior Management Specialist 1 FTE	31,400			31,400
141-2-115-0110-1-72130-520110-PBEN-0000-115	Social Security	1,947		(51)	1,896
141-2-115-0110-1-72130-520410-PBEN-0000-115	Retirement	2,399			2,399
141-2-115-0110-1-72130-520610-PBEN-0000-115	Life Insurance	31		(2)	29
141-2-115-0110-1-72130-520710-PBEN-0000-115	Health Insurance	10,277			10,277
141-2-115-0110-1-72130-520810-PBEN-0000-115	Dental Insurance	227			227
141-2-115-0110-1-72130-521010-PBEN-0000-115	Unemployment Compensation	11			11
141-2-115-0110-1-72130-521210-PBEN-0000-115	Medicare	455		(11)	444
141-2-115-0110-1-72130-529910-PBEN-0000-115	Long Term Disability	83		(7)	76
141-2-115-0110-1-72130-529930-PBEN-0000-115	Short Term Disability	90		(7)	83
	Total 72130 - Other Student Support	**46,920**	**-**	**(78)**	**46,842**
	Total School	**114,149**	**233**	**(366)**	**114,016**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 9/18/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
Orchard Knob Elementary					
141-2-115-0194-1-72210-517210-PBEN-0000-115	Instructional Coach 1 FTE	46,861		(691)	46,170
141-2-115-0194-1-72210-520110-PBEN-0000-115	Social Security	2,905		(519)	2,386
141-2-115-0194-1-72210-520410-PBEN-0000-115	Retirement	2,704		(40)	2,664
141-2-115-0194-1-72210-520610-PBEN-0000-115	Life Insurance	30		(1)	29
141-2-115-0194-1-72210-520710-PBEN-0000-115	Health Insurance	9,848			9,848
141-2-115-0194-1-72210-520810-PBEN-0000-115	Dental Insurance	217			217
141-2-115-0194-1-72210-521010-PBEN-0000-115	Unemployment Compensation	10			10
141-2-115-0194-1-72210-521210-PBEN-0000-115	Medicare	679		(121)	558
141-2-115-0194-1-72210-529910-PBEN-0000-115	Long Term Disability	79		(6)	73
141-2-115-0194-1-72210-529930-PBEN-0000-115	Short Term Disability	86		(6)	80
	Total 72210 - Instructional Support	**63,419**	**-**	**(1,384)**	**62,035**
	Total School	**63,419**	**-**	**(1,384)**	**62,035**
	Total MidTown Learning Community	**671,558**	**17,555**	**(17,555)**	**671,558**
Chattanooga Charter School of Excellence Middle					
141-2-115-8010-8-71100-559990-0000-0000-115	Other Charges and Expenses	46,727			46,727
	Total 71100 - Regular Instruction	**46,727**	**-**	**-**	**46,727**
141-2-115-8010-8-72210-559990-0000-0000-115	Other Charges and Expenses	57,132			57,132
	Total 72210 - Instructional Support	**57,132**	**-**	**-**	**57,132**
141-2-115-8010-8-99100-550410-0000-0000-115	Indirect Cost (3.06%)	3,178			3,178
	Total 99100 - Indirect Cost	**3,178**	**-**	**-**	**3,178**
	Total School	**107,037**	**-**	**-**	**107,037**
	TOTAL BUDGET	**799,145**	**17,555**	**(17,555)**	**799,145**

HAMILTON COUNTY DEPT OF EDUCATION
FEDERAL PROGRAMS
ATSI 24 GRANT
BUDGET FISCAL YEAR 2025-2026

SOURCE OF FUNDS SUMMARY

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 9/18/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-122-0000-0-00000-471410-0000-0000-122	FY25 Carryover	82,415			82,415
	Total Source of Funds	**82,415**	**-**	**-**	**82,415**

USE OF FUNDS SUMMARY

71100	Regular Instruction	35,168	-	(394)	34,774
72130	Other Student Support	20,411	-	(59)	20,352
72210	Instructional Support	24,479	2,507	(1,979)	25,007
99100	Indirect Cost	2,357	-	(75)	2,282
	Total Use of Funds	**82,415**	**2,507**	**(2,507)**	**82,415**

USE OF FUNDS DETAIL

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 9/18/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
Red Bank Middle School					
141-2-122-0180-2-71100-5116H0-PBEN-0000-122	Intervention Teacher .3 FTE	15,000			15,000
141-2-122-0180-2-71100-516350-PBEN-0000-122	Educational Assistant - Behavior .3 FTE	8,230		(347)	7,883
141-2-122-0180-2-71100-520110-0000-0000-122	Social Security	1,440		(32)	1,408
141-2-122-0180-2-71100-520410-0000-0000-122	Retirement	1,827			1,827
141-2-122-0180-2-71100-520610-0000-0000-122	Life Insurance	24			24
141-2-122-0180-2-71100-520710-0000-0000-122	Health Insurance	7,992			7,992
141-2-122-0180-2-71100-520810-0000-0000-122	Dental Insurance	176			176
141-2-122-0180-2-71100-521010-0000-0000-122	Unemployment Compensation	8			8
141-2-122-0180-2-71100-521210-0000-0000-122	Medicare	337		(8)	329
141-2-122-0180-2-71100-529910-0000-0000-122	Long Term Disability	64		(3)	61
141-2-122-0180-2-71100-529930-0000-0000-122	Short Term Disability	70		(4)	66
	Total 71100 - Regular Instruction	**35,168**	**-**	**(394)**	**34,774**
141-2-122-0180-2-72130-5189B0-PBEN-0000-122	Truancy Specialist .3 FTE	14,089			14,089
141-2-122-0180-2-72130-520110-0000-0000-122	Social Security	874		(45)	829
141-2-122-0180-2-72130-520410-0000-0000-122	Retirement	1,077		(1)	1,076
141-2-122-0180-2-72130-520610-0000-0000-122	Life Insurance	12			12
141-2-122-0180-2-72130-520710-0000-0000-122	Health Insurance	3,996			3,996
141-2-122-0180-2-72130-520810-0000-0000-122	Dental Insurance	88			88
141-2-122-0180-2-72130-521010-0000-0000-122	Unemployment Compensation	4			4
141-2-122-0180-2-72130-521210-0000-0000-122	Medicare	204		(10)	194
141-2-122-0180-2-72130-529910-0000-0000-122	Long Term Disability	32		(1)	31
141-2-122-0180-2-72130-529930-0000-0000-122	Short Term Disability	35		(2)	33
	Total 72130 - Other Student Support	**20,411**	**-**	**(59)**	**20,352**
141-2-122-0180-2-72210-539980-0000-0000-122	Contracted Services - Substitutes	3,045	2,507		5,552
141-2-122-0180-2-72210-552410-0000-0000-122	Staff Development	21,434		(1,979)	19,455
	Total 72210 - Instruction Support	**24,479**	**2,507**	**(1,979)**	**25,007**
141-2-122-0180-2-99100-550410-0000-0000-122	Indirect Cost (3.06%)	2,357		(75)	2,282
	Total 99100 - Indirect Cost	**2,357**	**-**	**(75)**	**2,282**
	Total Red Bank Middle School	**82,415**	**2,507**	**(2,507)**	**82,415**
	TOTAL BUDGET	**82,415**	**2,507**	**(2,507)**	**82,415**

HAMILTON COUNTY DEPARTMENT OF EDUCATION
FEDERAL PROGRAMS
MENTAL HEALTH SERVICE PROFESSIONAL GRANT
BUDGET FISCAL YEAR 2025-2026

	FY26 Allocation	-	995,777		995,777
	FY25 Carryover	497,889	468,989		966,878
	Total Source of Funds	**497,889**	**1,464,766**	**-**	**1,962,655**

SOURCE OF FUNDS SUMMARY

ACCOUNT CODE	DESCRIPTION	FY2026 BUDGET DOCUMENT	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-148-0000-0-00000-479900-0000-0000-148	Revenue	497,889	1,464,766		1,962,655
	Total Source of Funds	**497,889**	**1,464,766**	**-**	**1,962,655**

USE OF FUNDS SUMMARY

72130	Other Student Support	421,275	1,217,074	-	1,638,349
72710	Transportation	5,000	15,000	-	20,000
99100	Transfers	71,614	232,692	-	304,306
	Total Use of Funds	**497,889**	**1,464,766**	**-**	**1,962,655**

USE OF FUNDS DETAIL

ACCOUNT CODE	DESCRIPTION	FY2026 BUDGET DOCUMENT	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-2-148-0000-0-72130-518810-0000-0000-148	Bonus Payment	64,000	172,000		236,000
141-2-148-0000-0-72130-5189A0-PWOB-0000-148	Resource Facilitator - Part-time (.5 FTE)	-	35,000		35,000
141-2-148-0000-0-72130-518990-PWOB-0000-148	Interns 16 headcount - part-time	145,800	340,146		485,946
141-2-148-0000-0-72130-519610-0000-0000-148	Supervisor Stipend - 28 Supervisors	15,120	45,360		60,480
141-2-148-0000-0-72130-520110-0000-0000-148	Social Security	13,945	37,185		51,130
141-2-148-0000-0-72130-520410-0000-0000-148	State Retirement	7,121	7,772		14,893
141-2-148-0000-0-72130-520610-0000-0000-148	Life Insurance	-	195		195
141-2-148-0000-0-72130-520710-0000-0000-148	Health Insurance	-	66,600		66,600
141-2-148-0000-0-72130-520770-PWOB-0000-148	Health Insurance - Part-time	-	6,500		6,500
141-2-148-0000-0-72130-520810-0000-0000-148	Dental Insurance	-	1,470		1,470
141-2-148-0000-0-72130-521010-0000-0000-148	Unemployment Compensation	-	70		70
141-2-148-0000-0-72130-521210-0000-0000-148	Medicare	3,262	8,695		11,957
141-2-148-0000-0-72130-535610-0000-0000-148	Tuition	140,000	400,000		540,000
141-2-148-0000-0-72130-552410-0000-0000-148	Staff Development	5,027	15,081		20,108
141-2-148-0000-0-72130-559990-0000-0000-148	Other Charges	27,000	81,000		108,000
	Total 72130 - Other Student Support	**421,275**	**1,217,074**	**-**	**1,638,349**
141-2-148-0000-0-72710-531410-0000-0000-148	Contracts with Public Carriers	5,000	15,000		20,000
	Total 72710 - Transportation	**5,000**	**15,000**	**-**	**20,000**
141-2-148-0000-0-99100-550410-0000-0000-148	Indirect Cost (18.35%)	71,614	232,692		304,306
	Total 99100 - Transfers	**71,614**	**232,692**	**-**	**304,306**
	TOTAL BUDGET	**497,889**	**1,464,766**	**-**	**1,962,655**

HAMILTON COUNTY DEPARTMENT OF EDUCATION
FEDERAL PROGRAMS
USDOE SCHOOL BASED MENTAL HEALTH GRANT
BUDGET FISCAL YEAR 2025-2026

FY26 allocation is $1,725,384

Year one of a four year award

SOURCE OF FUNDS SUMMARY

ACCOUNT CODE	DESCRIPTION	FY2026 BUDGET 1/15/2026
141-2-149-0000-0-00000-479900-0000-0000-149	Revenue	1,725,384
	Total Source of Funds	**1,725,384**

USE OF FUNDS SUMMARY

72130	Other Student Support	1,639,115
99100	Indirect Cost	86,269
	Total Use of Funds	**1,725,384**

USE OF FUNDS DETAIL

ACCOUNT CODE	DESCRIPTION	FY2026 BUDGET 1/15/2026
141-2-149-0000-0-72130-512410-PBEN-0000-149	Psychological Personnel (10 FTE)	1,075,600
141-2-149-0000-0-72130-512410-PBEN-0000-149	Extended Contracts - Psychological Personnel	39,750
141-2-149-0000-0-72130-5189A0-PWOB-0000-149	Resource Facilitator (0.5 FTE)	35,000
141-2-149-0000-0-72130-518810-0000-0000-149	Bonus Payment	140,000
141-2-149-0000-0-72130-520110-0000-0000-149	Social Security	4,960
141-2-149-0000-0-72130-520110-PBEN-0000-149	Social Security	72,872
141-2-149-0000-0-72130-520110-PWOB-0000-149	Social Security	2,170
141-2-149-0000-0-72130-520410-0000-0000-149	State Retirement	6,400
141-2-149-0000-0-72130-520410-PBEN-0000-149	State Retirement	94,028
141-2-149-0000-0-72130-520610-PBEN-0000-149	Life Insurance	400
141-2-149-0000-0-72130-520710-PBEN-0000-149	Health Insurance	132,550
141-2-149-0000-0-72130-520770-PWOB-0000-149	Health Insurance	650
141-2-149-0000-0-72130-520810-PBEN-0000-149	Dental Insurance	2,810
141-2-149-0000-0-72130-521010-PBEN-0000-149	Unemployment Compensation	140
141-2-149-0000-0-72130-521210-0000-0000-149	Medicare	1,160
141-2-149-0000-0-72130-521210-PBEN-0000-149	Medicare	17,043
141-2-149-0000-0-72130-521210-PWOB-0000-149	Medicare	508
141-2-149-0000-0-72130-529910-PBEN-0000-149	Long Term Disability	1,070
141-2-149-0000-0-72130-529930-PBEN-0000-149	Short Term Disability	1,160
141-2-149-0000-0-72130-552410-0000-0000-149	In Service/Staff Development	10,845
	Total 72130 - Other Student Support	**1,639,115**
141-2-149-0000-0-99100-550410-0000-0000-149	Indirect Cost (5%)	86,269
	Total 99100 - Indirect Cost	**86,269**
	TOTAL BUDGET	**1,725,384**

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

SOURCE OF FUNDS SUMMARY

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 12/18/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
141-5-435-0000-0-00000-481300-0000-0000-435	Other Government Contributions	49,004,337	362,411		49,366,748
	Total Source of Funds	**49,004,337**	**362,411**	**-**	**49,366,748**

USE OF FUNDS SUMMARY

76100	Capital Outlay	49,004,337	362,411	-	49,366,748
	Total Use of Funds	**49,004,337**	**362,411**	**-**	**49,366,748**

USE OF FUNDS DETAIL

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 12/18/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
Deferred Maintenance					
District 1					
141-5-435-0196-4-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -Sequoyah Roof	2,260,044	23,183		2,283,227
141-5-435-0196-4-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -Sequoyah Fans	50,000			50,000
141-5-435-0190-4-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -Sale Creek Bleachers	300,000			300,000
141-5-435-0220-3-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -SDHS Security	39,872			39,872
141-5-435-0220-3-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -SDHS Brick Repair	1,152,508			1,152,508
141-5-435-0147-1-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -NHES Roof	728,755	7,125		735,880
141-5-435-0050-1-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -Daisy Elem-Fire Alarm	102,033			102,033
141-5-435-0230-1-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -Soddy Elem-Auditorium Roof	102,000			102,000
141-5-435-0220-3-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -Soddy Daisy High-JROTC Roof	59,000			59,000
141-5-435-0220-3-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -Soddy Daisy High - Weight Room Renovation	124,035			124,035
141-5-435-0147-1-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -North Hamilton Co Elem - Water Heaters	27,879			27,879
141-5-435-0190-4-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -Sale Creek Gym Locker Reno	300,000			300,000
141-5-435-0220-3-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -SDHS Old Gym Air Conditioning	350,000			350,000
141-5-435-0147-1-76100-570710-0000-1201-A09	Building Improvements - Ed Cap -North Hamilton Co Elem - Chiller	300,000			300,000
	Total 76100 - Capital Outlay - District 1	**5,896,126**	**30,308**	**-**	**5,926,434**
District 2					
141-5-435-0171-1-76100-570710-0000-1202-A09	Building Improvements - Ed Cap -RBE-Partial Roof	43,386			43,386
141-5-435-0240-1-76100-570710-0000-1202-A09	Building Improvements - Ed Cap -Thrasher-Chiller	177,000			177,000
141-5-435-0210-4-76100-570710-0000-1202-A09	Building Improvements - Ed Cap -SMMHS Turf Field	986,735	196,176		1,182,911
	Total 76100 - Capital Outlay - District 2	**1,207,121**	**196,176**	**-**	**1,403,297**
District 3					
141-5-435-0128-3-76100-570710-0000-1203-A09	Building Improvements - Ed Cap -Hixson High-Chiller	150,000			150,000
141-5-435-0019-1-76100-570710-0000-1203-A09	Building Improvements - Ed Cap -Big Ridge-Chiller	157,000			157,000
141-5-435-0128-3-76100-570710-0000-1203-A09	Building Improvements - Ed Cap -Hixson High - Vocational Rooftop Units	115,000			115,000
141-5-435-0120-2-76100-570710-0000-1203-A09	Building Improvements - Ed Cap -Loftis Middle-Chiller	380,000			380,000
141-5-435-0120-2-76100-570710-0000-1203-A09	Building Improvements - Ed Cap - Loftis Middle-Lobby/Clear Story Windows	36,000			36,000
141-5-435-0051-1-76100-570710-0000-1203-A09	Building Improvements - Ed Cap - McConnell Elem	2,000,000			2,000,000
141-5-435-0128-3-76100-570710-0000-1203-A09	Building Improvements - Ed Cap -Hixson High - Turf Football Field	1,000,000			1,000,000
	Total 76100 - Capital Outlay - District 3	**3,838,000**	**-**	**-**	**3,838,000**
District 4					
141-5-435-0046-4-76100-570710-0000-1204-A09	Building Improvements - Ed Cap -CSAS Auditorium Roof	120,000			120,000
141-5-435-0200-2-76100-570710-0000-1204-A09	Building Improvements - Ed Cap -OKMS Bleachers	184,850			184,850
141-5-435-0200-2-76100-570710-0000-1204-A09	Building Improvements - Ed Cap -OKMS HVAC	6,000,000			6,000,000
141-5-435-0046-4-76100-570710-0000-1204-A09	Building Improvements - Ed Cap -CSAS - Lower - Elementary Roof	62,000			62,000
141-5-435-0000-0-76100-570710-0000-1204-A09	Building Improvements - Ed Cap -Hillcrest Center-Security Entrance	30,000			30,000
141-5-435-0110-1-76100-570710-0000-1204-A09	Building Improvements - Ed Cap - Hardy Elem Playground	250,000			250,000
141-5-435-P85B-0-76100-570710-0000-1204-A09	Building Improvements - Ed Cap - FRFRC (Gateway) Stormwater Landscape	13,500			13,500
141-5-435-0046-4-76100-570710-0000-1204-A09	Building Improvements - Ed Cap -CSAS Stadium/Turf	4,500,000			4,500,000
141-5-435-0200-2-76100-570710-0000-1204-A09	Building Improvements - Ed Cap -OKMS Sand Gym Floor	37,000			37,000
141-5-435-P85B-0-76100-570710-0000-1204-A09	Building Improvements - Ed Cap - FRFRC (Gateway) CTE Expo Area	300,000			300,000
	Total 76100 - Capital Outlay - District 4	**11,497,350**	**-**	**-**	**11,497,350**
District 5					
141-5-435-0245-1-76100-570710-0000-1205-A09	Building Improvements - Ed Cap -Woodmore Shingle Roof	95,000			95,000
141-5-435-0245-1-76100-570710-0000-1205-A09	Building Improvements - Ed Cap -Woodmore-Boiler	200,000			200,000
141-5-435-0245-1-76100-570710-0000-1205-A09	Building Improvements - Ed Cap - Woodmore Elem - Brown Modified Roof	60,000			60,000
141-5-435-7056-7-76100-570710-0000-1205-A09	Building Improvements - Ed Cap -Dawn Program-Fencing	19,533			19,533
141-5-435-0245-1-76100-570710-0000-1205-A09	Building Improvements - Ed Cap -Woodmore-Playground Upgrade	250,000			250,000
141-5-435-0055-2-76100-570710-0000-1205-A09	Building Improvements - Ed Cap -Dalewood Reroof Pods-Gym	2,500,000			2,500,000
	Total 76100 - Capital Outlay - District 5	**3,124,533**	**-**	**-**	**3,124,533**
District 6					
141-5-435-0041-4-76100-570710-0000-1206-A09	Building Improvements - Ed Cap -NPMMS Fencing	150,000			150,000
141-5-435-0041-4-76100-570710-0000-1206-A09	Building Improvements - Ed Cap -NPMMS Fire Alarm	1,986			1,986
141-5-435-0175-3-76100-570710-0000-1206-A09	Building Improvements - Ed Cap - RBHS Renovation	140,535			140,535
141-5-435-0175-3-76100-570710-0000-1206-A09	Building Improvements - Ed Cap -RBHS Elevator	9,563			9,563
141-5-435-0045-4-76100-570710-0000-1206-A09	Building Improvements - Ed Cap -CCA Theatre Seating	456,269			456,269
141-5-435-0041-4-76100-570710-0000-1206-A09	Building Improvements - Ed Cap -NPMMS Elevator	101,142			101,142
141-5-435-0041-4-76100-570710-0000-1206-A09	Building Improvements - Ed Cap -NPMMS Windows	530,000			530,000
141-5-435-0045-4-76100-570710-0000-1206-A09	Building Improvements - Ed Cap -CCA Stage Wall	300,000			300,000
141-5-435-0175-3-76100-570710-0000-1206-A09	Building Improvements - Ed Cap - RBHS Replace Gym Floor	300,000			300,000
141-5-435-0175-3-76100-570710-0000-1206-A09	Building Improvements - Ed Cap - RBHS Replace Gym Hallway Roof	100,000			100,000
141-5-435-0041-4-76100-570710-0000-1206-A09	Building Improvements - Ed Cap -NPMMS Gym Units	170,000			170,000
	Total 76100 - Capital Outlay - District 6	**2,259,495**	**-**	**-**	**2,259,495**

ACCOUNT CODE	DESCRIPTION	AMENDED BUDGET 12/18/2025	INCREASE	DECREASE	AMENDED BUDGET 1/15/2026
District 7					
141-5-435-0059-3-76100-570710-0000-1207-A09	Building Improvements - Ed Cap - EHHS Parking Lot	72			72
141-5-435-0059-3-76100-570710-0000-1207-A09	Building Improvements - Ed Cap -EHHS Stadium/Turf	683,931	47,500		731,431
141-5-435-0059-3-76100-570710-0000-1207-A09	Building Improvements - Ed Cap - EHHS Stair Treads	15,000			15,000
141-5-435-0265-1-76100-539990-0000-1207-A09	Building Improvements - Ed Cap - Westview - Chiller	300,000			300,000
141-5-435-0265-1-76100-533510-0000-1207-A09	Building Improvements - Ed Cap - Westview - Paving	100,000			100,000
	Total 76100 - Capital Outlay - District 7	**1,099,003**	**47,500**	**-**	**1,146,503**
District 8					
141-5-435-0070-3-76100-570710-0000-1208-A09	Building Improvements - Ed Cap - ERHS Ceiling Demo	750,000			750,000
141-5-435-0070-3-76100-570710-0000-1208-A09	Building Improvements - Ed Cap - ERHS Softball Field	483,150	10,100		493,250
141-5-435-0070-3-76100-539990-0000-1208-A09	Other Contracted Services - ERHS Gym Floor/Paint	44,165			44,165
141-5-435-0235-1-76100-570710-0000-1208-A09	Building Improvements - Ed Cap - Spring Creek-Fire Alarm	113,469			113,469
141-5-435-0070-3-76100-570710-0000-1208-A09	Building Improvements - Ed Cap - ERHS Gym Roof	72,000			72,000
	Total 76100 - Capital Outlay - District 8	**1,462,784**	**10,100**	**-**	**1,472,884**
District 9					
141-5-435-0100-2-76100-570710-0000-1209-A09	Building Improvements - Ed Cap - Hunter Baseball Fld	161,725			161,725
141-5-435-0040-3-76100-570710-0000-1209-A09	Building Improvements - Ed Cap - Central Bleachers	500,000			500,000
141-5-435-0040-3-76100-570710-0000-1209-A09	Building Improvements - Ed Cap - Central Rooftop Units	3,199,774			3,199,774
141-5-435-0215-1-76100-570710-0000-1209-A09	Building Improvements - Ed Cap - Snow Hill Chiller	245,000			245,000
141-5-435-0215-1-76100-570710-0000-1209-A09	Building Improvements - Ed Cap - Snow Hill Roof/Addit	1,281,192	9,404		1,290,596
141-5-435-0040-3-76100-570710-0000-1209-A09	Building Improvements - Ed Cap - Central - Turf	1,000,000			1,000,000
141-5-435-0040-3-76100-570710-0000-1209-A09	Building Improvements - Ed Cap - Central Front Office Renovation	40,000			40,000
141-5-435-0100-2-76100-570710-0000-1209-A09	Building Improvements - Ed Cap - Hunter Athletic Field ADA	150,000			150,000
	Total 76100 - Capital Outlay - District 9	**6,577,691**	**9,404**	**-**	**6,587,095**
District 10					
141-5-435-0160-3-76100-570710-0000-1210-A09	Building Improvements - Ed Cap - OHS Chiller	70,000			70,000
141-5-435-0160-3-76100-570710-0000-1210-A09	Building Improvements - Ed Cap - OHS Track	540,821	68,923		609,744
141-5-435-0017-1-76100-570710-0000-1210-A09	Building Improvements - Ed Cap - BTES Roof	242,066			242,066
141-5-435-0017-1-76100-570710-0000-1210-A09	Building Improvements - Ed Cap - BTES Controls	9,500			9,500
141-5-435-0260-1-76100-570710-0000-1210-A09	Building Improvements - Ed Cap - Wallace Smith Controls	450,000			450,000
141-5-435-0100-2-76100-570710-0000-1210-A09	Building Improvements - Ed Cap - Hunter Mid Controls	725,000			725,000
141-5-435-0157-2-76100-570710-0000-1210-A09	Building Improvements - Ed Cap - Ooltewah Mid-Roof	430,000			430,000
141-5-435-0160-3-76100-570710-0000-1210-A09	Building Improvements - Ed Cap - OHS Soccer RR	300,000			300,000
	Total 76100 - Capital Outlay - District 10	**2,767,387**	**68,923**	**-**	**2,836,310**
District 11					
141-5-435-0064-2-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - ELA EPDM Roof	740,925			740,925
141-5-435-0137-3-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - Howard High-Settling	492,750			492,750
141-5-435-0125-1-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - Lkt Mtn Cafeteria Roof	293,592			293,592
141-5-435-0125-1-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - Lkt Mtn Controls	27,750			27,750
141-5-435-0165-4-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - LVMHS Wallpacks	1,452,855			1,452,855
141-5-435-0241-1-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - LVE Roof,Ceiling	902,397			902,397
141-5-435-0241-1-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - LVE Restrooms	90,000			90,000
141-5-435-0037-1-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - Donaldson Roof	67,000			67,000
141-5-435-0063-1-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - East Lake Ele Chiller	220,000			220,000
141-5-435-0063-1-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - East Lake Ele Water Heater	29,734			29,734
141-5-435-0016-1-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - Battle Academy Office Remodel	15,000			15,000
141-5-435-0125-1-76100-570710-0000-1211-A09	Building Improvements - Ed Cap - Lkt Mtn Elevator	100,000			100,000
	Total 76100 - Capital Outlay - District 11	**4,432,003**	**-**	**-**	**4,432,003**
District Projects					
141-5-435-0000-0-76100-570710-0000-1212-A09	Building Improvements - Ed Cap - Service Center Roof	887,239			887,239
141-5-435-0000-0-76100-539990-0000-1212-A09	Other Contracted Services - CSLA/Dawn Demo	968,602			968,602
141-5-435-6000-0-76100-539990-0000-1212-A09	Other Contracted Services - System Wide Painting	917,003			917,003
141-5-435-6000-0-76100-570710-0000-1212-A09	Building Improvements - Ed Cap - System Wide Alarms	50,000			50,000
141-5-435-6000-0-76100-539990-0000-1212-A09	Other Contracted Services - Flooring System Wide	150,000			150,000
141-5-435-6000-0-76100-539990-0000-1212-A09	Other Contracted Services - Asbestos Abatement-System	100,000			100,000
141-5-435-6000-0-76100-570710-0000-1212-A09	Building Improvement - Ed Cap Playground Safety System wide	150,000			150,000
141-5-435-6000-0-76100-570710-0000-1212-A09	Building Improvement - Ed Cap HVAC System wide	150,000			150,000
141-5-435-6000-0-76100-570710-0000-1212-A09	Building Improvement - Ed Cap Marker Boards System wide	50,000			50,000
141-5-435-6000-0-76100-570710-0000-1212-A09	Building Improvement - Ed Cap Fencing System wide	150,000			150,000
141-5-435-6000-0-76100-570710-0000-1212-A09	Building Improvement - Ed Cap Fire Code Upgrades System wide	100,000			100,000
141-5-435-6000-0-76100-570710-0000-1212-A09	Building Improvement - Ed Cap Wood Exterior Doors	200,000			200,000
141-5-435-0000-0-76100-533510-0000-1212-A09	Maintenance & Repairs Bldgs - Paving	300,000			300,000
141-5-435-0000-0-76100-533610-0000-1212-A09	Maintenance & Repairs Services- IT (Paging System upgrades)	200,000			200,000
141-5-435-0000-0-76100-570710-0000-1212-A09	Building Improvement - Ed Cap Door Locks	200,000			200,000
141-5-435-0000-0-76100-570710-0000-1212-A09	Building Improvement - Ed Cap Central Office Bldg 228 RTU	20,000			20,000
141-5-435-0000-0-76100-570710-0000-1212-A09	Building Improvement - Ed Cap Central Office Remaining Roofs	250,000			250,000
	Total 76100 - Capital Outlay - District Wide	**4,842,844**	**-**	**-**	**4,842,844**
	Total Deferred Maintenance Phase 1	**49,004,337**	**362,411**	**-**	**49,366,748**
	TOTAL BUDGET	**49,004,337**	**362,411**	**-**	**49,366,748**

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

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

From: Mary Ellen Heuton, CPA – Chief Financial Officer

Date: January 15, 2026

Subject: FY26 Budget Amendment – General Purpose

Board Agenda Category:

- ☑ Consent Agenda
- ☐ Action Item
- ☐ Reports and Information

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

- Transfers between accounts to reclassify existing budget appropriations between various lines as indicated in the attachment. These transfers will not increase the total FY26 budget.

- In addition to the FY26 expenditures appropriated in the original FY26 Approved Budget, the FY26 budget approval allowed for the appropriation of funds to meet obligations carried forward from FY25 open purchase order balances in each respective fund. The amount appropriated at 7/1/25 was $20,150,072.58. A portion of this appropriation has been reversed either because the obligation was cancelled or the appropriation was covered with other funding. The current amount appropriated is $13,052,747.12 ($11,749,459.00 for General Purpose Operating, $8,247.50 General Purpose State and $1,181,811.23 for Federal).

- Summary of Operating Budget Amendments through 01/15/2026:
  - **Original Approved Operating:** **$577,580,874**
  - **Amended Operating Through 10/09/2025:** **$592,597,776**
  - **Amended Operating Through 01/15/2026:** **$604,347,235**

Opportunity 2030 Commitment Connection

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

Hamilton County Schools
Fiscal Year 2026
Operating Budget
Expenditures by Function - Approved and Amended
January 15, 2026

Function	Function Description	Approved Operating	Transfers Between Accounts Through 9/30/2025	Transfer Between Accounts 10/01/2025 to 12/31/2025	Revenue Appropriations Through 1/15/2026	Fund Balance Appropriations Through 01/15/2026	FY25 Encumbrance Carryforward	Amended Operating 12/31/2025
71100	Regular Education Instruction	243,475,983	1,068,190	(3,194,753)	1,293,883	5,089,196	10,949,770	258,682,269
71200	Special Education Instruction	42,992,520	(13,155)	920,140	2,008,449	-	-	45,907,954
71300	CTE Instructional	13,665,424	27,678	155,727	445,812	-	-	14,294,641
71400	Student Body Education	4,563,624	48,000	(8,000)	-	-	-	4,603,624
72110	Attendance	7,788,126	(56,614)	(77,799)	1,216,255	-	-	8,869,969
72120	Health Services	7,027,172	83,257	84,246	36,097	-	-	7,230,772
72130	Other Student Support	28,284,451	43,922	6,707	1,211,187	500,000	31,282	30,077,549
72210	Reg Ed Instruction Support	29,268,158	(907,384)	712,061	1,169,563	-	26,562	30,268,960
72220	Special Ed Instruction Support	12,609,004	(129,199)	224,681	405,045	-	-	13,109,531
72230	CTE Instructional Support	698,213	8,133	12,208	-	-	-	718,554
72250	Educational Technology	9,227,277	104,057	696,076	-	81,895	89,806	10,199,111
72310	Board Of Education	6,928,477	(154,586)	31,059	-	-	25,000	6,829,950
72320	Director Of Schools	2,873,493	166,593	43,817	-	-	3,899	3,087,802
72410	Office Of The Principal	38,349,469	-	370,693	-	-	-	38,720,162
72510	Fiscal Services	4,442,932	(104,057)	(246,949)	-	780,563	-	4,872,489
72520	Human Resources/Personnel	4,568,932	93,320	131,062	-	-	23,750	4,817,064
72610	Operation Of Plant	35,490,091	(630,028)	(70,035)	-	-	23,581	34,813,609
72620	Maintenance Of Plant	12,312,491	-	181,294	-	-	547,593	13,041,378
72710	Transportation	28,667,109	(34,685)	29,744	-	-	-	28,662,169
72810	Central And Other	2,676,353	381,582	(23,297)	-	-	28,216	3,062,854
73100	School Nutrition	5,850	-	-	-	-	-	5,850
73300	Community Services	748,518	4,976	18,300	-	-	-	771,794
73400	Early Childhood Education	134,838	-	3,019	-	-	-	137,857
76100	Regular Capital Outlay	-	-	-	-	101,412	-	101,412
99100	Operating Transfers	-	-	-	-	-	-	-
99110	Transfer to Capital Maintenance	-	-	-	-	138,873	-	138,873
99120	Transfer to Charter Schools	40,782,369	-	-	538,672	-	-	41,321,041
	Grand Total	577,580,874	-	-	8,324,963	6,691,939	11,749,459	604,347,235

Summary of Revenue Appropriations

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

Summary of Fund Balance Appropriations

7/17/2025	Appropriate funds from Unassigned for East Side Elementary Multi-purpose Field *source correction 10/9/25	101,412
9/18/2025	Reappropriate funds from Committed for Education for FY26 Matching Bonus	3,500,000
9/18/2025	Appropriate funds from Assigned for Education for FY26 Matching Bonus	400,000
10/9/2025	Reappropriate from Assigned for Education for Student and Staff Device, Security, and Budget Modeling/MUNIS	2,529,461
10/9/2025	Reppropriate funds from Assigned for Education for SRDI and Dual Enrollment	22,194
10/9/2025	Appropriate funds from Unassigned for Architectural Services and East Hamilton Amphitheatre	138,873
	Total Fund Balance Appropriations	6,691,939

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Pkwy
Chattanooga, TN 37421

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

From: Mary Ellen Heuton, Chief Financial Officer

Date: January 15, 2026

Subject: Budget Amendment- School Nutrition

Board Agenda Category:

- ☑ Consent Agenda
- ☐ Action Item
- ☐ Reports and Information

Board approval is recommended for the following items for School Nutrition for Fiscal Year 2026:

- Reclassify existing budget appropriations as indicated in the attachment.
- Prior year encumbrance carryforwards were funded in the amount of $260,576.56.
- Appropriation of fund balance restricted for the School Nutrition Program to purchase equipment $560,539.00.

The fund balance restricted for the School Nutrition Program totaled $14,076,510 as of 7/1/2025 and is more than sufficient for the above uses.

The USDA recommends that School Nutrition Programs keep a fund balance equivalent to 2-3 months of average operating expenses. Using funds for non-recurring expenses would reduce the School Nutrition fund balance from 5.02 to 4.8 months of expenses, still leaving a sufficient balance for future operations.

Opportunity 2030 Commitment Connection

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

SCHOOL NUTRITION PROGRAM
Budget Amendment FY26

ACCOUNT	ACCOUNT DESCRIPTION	APPROVED BUDGET FY26	INCREASE	DECREASE	PROPOSED AMENDMENT BUDGET 1/15/2026
143-0-819-0000-0-00000-435225-0000-0000-	Adult Lunch Meals	164,826.00			164,826.00
143-0-819-0000-0-00000-435230-0000-0000-	Student Breakfast Meals	246,319.00			246,319.00
143-0-819-0000-0-00000-435231-0000-0000-	Student Lunch Meals	2,098,803.00			2,098,803.00
143-0-819-0000-0-00000-435234-0000-0000-	Adult Breakfast Meals	4,391.00			4,391.00
143-0-819-0000-0-00000-435250-0000-0000-	A La Carte Breakfast St	25,342.00			25,342.00
143-0-819-0000-0-00000-435251-0000-0000-	A La Carte Lunch Studen	938,155.00			938,155.00
143-0-819-0000-0-00000-435252-0000-0000-	A La Carte Breakfast Ad	6,336.00			6,336.00
143-0-819-0000-0-00000-435253-0000-0000-	A La Carte Lunch Adult	234,539.00			234,539.00
143-0-819-0000-0-00000-439900-0000-0000-	Other Charges	111,464.00			111,464.00
143-0-819-0000-0-00000-441100-0000-0000-	Interest Earned-Now Acc	579,810.00			579,810.00
143-0-819-0000-0-00000-445300-0000-0000-	Sale Of Equipment	3,500.00			3,500.00
143-0-819-0000-0-00000-465200-0000-0000-	School Nutrition	210,000.00			210,000.00
143-0-819-0000-0-00000-471110-0000-0000-	Section 4 Lunch	17,875,488.00			17,875,488.00
143-0-819-0000-0-00000-471120-0000-0000-	Commodities	2,032,465.00			2,032,465.00
143-0-819-0000-0-00000-471130-0000-0000-	Breakfast-USDA	5,359,313.00			5,359,313.00
143-0-819-0000-0-00000-471140-0000-0000-	USDA- Other	458,918.00			458,918.00
143-0-819-0000-0-00000-471150-0000-0000-	USDA- Equipment	-			-
143-0-819-0000-0-00000-4T0001-0000-0000-	PY Encumbrance Budget		260,576.56		260,576.56
143-0-819-0000-0-00000-4T4570-0000-0000-	Transf from Restr- Oper Non Inst		560,539.00		560,539.00
	TOTAL REVENUE	**30,349,669.00**	**821,115.56**	**-**	**31,170,784.56**

ACCOUNT	ACCOUNT DESCRIPTION	APPROVED BUDGET FY26	INCREASE	DECREASE	PROPOSED AMENDMENT BUDGET 1/15/2026
143-0-819-0000-0-73100-510510-0000-0000-	510510 Director	119,796.00			119,796.00
143-0-819-0000-0-73100-510520-0000-0000-	510520 Supervisor	365,255.00			365,255.00
143-0-819-0000-0-73100-510550-0000-0000-	510550 Dietitian	74,389.00			74,389.00
143-0-819-0000-0-73100-511910-0000-0000-	511910 Accountant	85,949.00			85,949.00
143-0-819-0000-0-73100-512010-0000-0000-	512010 IT Specialist	173,084.00			173,084.00
143-0-819-0000-0-73100-514910-0000-0000-	514910 Warehouse Personnel	192,659.00			192,659.00
143-0-819-0000-0-73100-516110-0000-0000-	516110 Administrative Assistant	66,641.00			66,641.00
143-0-819-0000-0-73100-516210-0000-0000-	516210 Clerical Personnel	228,076.00			228,076.00
143-0-819-6000-0-73100-516510-0000-0000-	516510 Cafeteria Personnel	4,340,592.00		148,000.00	4,192,592.00
143-0-819-6000-0-73100-516510-PPTT-0000-	516510 Cafeteria Personnel	4,348,179.00			4,348,179.00
143-0-819-6000-0-73100-518810-0000-0000-	518810 Bonus Pay	-	470,000.00		470,000.00
143-0-819-6000-0-73100-518820-0000-0000-	518820 Bonus Pay	322,000.00		322,000.00	-
143-0-819-0000-0-73100-519610-0000-0000-	In Service/Stipend	2,000.00	3,000.00		5,000.00
143-0-819-0000-0-73100-520110-0000-0000-	520110 Social Security	80,963.00			80,963.00
143-0-819-6000-0-73100-520110-0000-0000-	520110 Social Security	269,117.00			269,117.00
143-0-819-6000-0-73100-520110-PPTT-0000-	520110 Social Security	269,588.00			269,588.00
143-0-819-0000-0-73100-520410-0000-0000-	520410 State Retirement	165,843.00			165,843.00
143-0-819-6000-0-73100-520410-0000-0000-	520410 State Retirement	551,256.00			551,256.00
143-0-819-0000-0-73100-520610-0000-0000-	520610 Life Insurance	720.00			720.00
143-0-819-6000-0-73100-520610-0000-0000-	520610 Life Insurance	5,720.00			5,720.00
143-0-819-0000-0-73100-520710-0000-0000-	520710 Medical Insurance	239,760.00			239,760.00
143-0-819-6000-0-73100-520710-0000-0000-	520710 Medical Insurance	1,904,760.00			1,904,760.00
143-0-819-6000-0-73100-520710-PPTT-0000-	520710 Medical Insurance	184,800.00		184,800.00	-
143-0-819-6000-0-73100-520770-PPTT-0000-	520770 Medical Insurance Part	-	184,800.00		184,800.00
143-0-819-0000-0-73100-520810-0000-0000-	520810 Dental Insurance	5,292.00			5,292.00
143-0-819-6000-0-73100-520810-0000-0000-	520810 Dental Insurance	42,042.00			42,042.00
143-0-819-0000-0-73100-521010-0000-0000-	521010 Unemployment	252.00			252.00
143-0-819-6000-0-73100-521010-0000-0000-	521010 Unemployment	2,002.00			2,002.00
143-0-819-0000-0-73100-521210-0000-0000-	521210 Employer Medicare	18,935.00			18,935.00
143-0-819-6000-0-73100-521210-0000-0000-	521210 Employer Medicare	62,939.00			62,939.00
143-0-819-6000-0-73100-521210-PPTT-0000-	521210 Employer Medicare	63,049.00			63,049.00
143-0-819-0000-0-73100-521710-0000-0000-	521710 State Retirement Hybrid	86,812.00			86,812.00
143-0-819-0000-0-73100-529910-0000-0000-	529910 Long Term Disability	1,926.00			1,926.00
143-0-819-6000-0-73100-529910-0000-0000-	529910 Long Term Disability	15,301.00			15,301.00
143-0-819-0000-0-73100-529930-0000-0000-	529930 Short Term Disability	2,088.00			2,088.00
143-0-819-6000-0-73100-529930-0000-0000-	529930 Short Term Disability	16,588.00			16,588.00
143-0-819-0000-0-73100-530710-0000-0000-	530710 Telephone	2,000.00			2,000.00
143-0-819-6000-0-73100-533610-0000-0000-	533610 Maint & Repairs - Equip	150,000.00			150,000.00
143-0-819-6000-0-73100-533620-0000-0000-	533620 Maint&Repairs-Coolers/F	220,000.00			220,000.00

143-0-819-6000-0-73100-533630-0000-0000-	533630 Maint & Repairs - Ice M	20,000.00			20,000.00
143-0-819-6000-0-73100-533640-0000-0000-	533640 Maint & Repairs-Dish Ma	35,000.00			35,000.00
143-0-819-6000-0-73100-533650-0000-0000-	533650 Maint & Repairs-Plumbin	25,000.00	15,000.00		40,000.00
143-0-819-0000-0-73100-533810-0000-0000-	533810 Maint & Repairs - Vehic	25,000.00			25,000.00
143-0-819-6000-0-73100-535510-0000-0000-	535510 Travel-Mileage	29,000.00			29,000.00
143-0-819-6000-0-73100-535910-0000-0000-	535910 Disposal Fees	87,000.00			87,000.00
143-0-819-0000-0-73100-539910-0000-0000-	539910 Copier Lease/Maint	4,500.00			4,500.00
143-0-819-0000-0-73100-539940-0000-0000-	539940 Contracted Printing	4,000.00			4,000.00
143-0-819-6000-0-73100-539960-0000-0000-	539960 Sanitation/Safety Contr	199,770.00			199,770.00
143-0-819-6000-0-73100-539990-0000-0000-	539990 Other Contracted Servic	950,000.00			950,000.00
143-0-819-6000-0-73100-542210-0000-0000-	542210 Food Supplies	10,628,323.00			10,628,323.00
143-0-819-6000-0-73100-542220-0000-0000-	542220 Food - Disposables	1,132,847.00			1,132,847.00
143-0-819-6000-0-73100-542280-0000-0000-	542280 Fruits And Vegetable Pr	201,000.00			201,000.00
143-0-819-0000-0-73100-542510-0000-0000-	542510 Gasoline	11,000.00			11,000.00
143-0-819-0000-0-73100-543510-0000-0000-	543510 Office Supplies	20,000.00			20,000.00
143-0-819-6000-0-73100-546910-0000-0000-	546910 USDA Commodities	2,032,465.00			2,032,465.00
143-0-819-0000-0-73100-549990-0000-0000-	549990 Other Supplies And Mate	50,000.00	10,436.40		60,436.40
143-0-819-6000-0-73100-547110-0000-0000-	547110 Software	134,391.00		47,461.00	86,930.00
143-0-819-0000-0-73100-552410-0000-0000-	552410 In Service/Staff Develo	30,000.00			30,000.00
143-0-819-6000-0-73100-571010-0000-0000-	571010 Equipment Food Service	50,000.00	840,140.16		890,140.16
	TOTAL EXPENSES	**30,349,669.00**	**1,523,376.56**	**702,261.00**	**31,170,784.56**

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

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

From: Dr. Zac Brown
Chief Talent Officer

Date: January 15, 2026

Subject: PECCA Updates

Board Agenda Category:

- ☑ Consent Agenda
- ☐ Action Item
- ☐ Reports and Information

This memo is to provide the Board with updates to Collaborative Conferencing under PECCA. As previously reported, Hamilton County Schools (HCS) completed the Professional Educators Collaborative Conferencing Act (PECCA) voting process, resulting in the selection of the Hamilton County Education Association (HCEA) as the designated professional employee organization to engage in collaborative conferencing with the Board of Education.

PECCA Structure

As the Board will recall, the initial committee recommendations were submitted at the December Board meeting. However, upon further consultation with legal counsel, the District was advised that PECCA permits additional representatives to serve on the collaborative conferencing team beyond the initially identified members. This flexibility allows both parties to strengthen representation and ensure appropriate expertise and continuity throughout the conferencing process and assist with meeting quorum. Additionally, we would like to designate a Board liaison.

Based on this guidance, HCS and HCEA would like to each add two (2) additional members to the collaborative conferencing team. Thus, the Collaborative Conferencing Team will now consist of ten (10) members, equally representing HCS and HCEA as follows:

HCS Representatives

- Dr. Justin Robertson
- Dr. Zac Brown
- Mary Ellen Heuton
- Dr. Robert Sharpe
- Dr. Jennifer Whalen

- Dr. Elaine Harper
- Penny Murray
- Dr. Jamie Parris
- *Dr. Sonia Stewart*
- *Rachel Gordon*

HCEA Representatives

- Lori Cleveland
- Kayla Butler
- Michelle Gooden
- Shane McNeese
- Kimberly Elbakidze
- Jeanette Omarkhail
- Jeremy Barrett
- David Jackson
- *Amy Smith-Johnson*
- *Emma Jaschke*

(Newly added members indicated above)

Additionally, the team is allowed to have a Board liaison. Therefore, to support communication and coordination with the Board of Education, the following Board member is recommended to service as a liaison.

HCDE Board Member Liaison

The Board member liaison is a non-voting member but may attend any and all sessions.

- Gary Kuehn – Board Member Liaison

Training and Planning Timeline

- January 17, 2026: HCEA will conduct training for newly appointed HCEA collaborative conferencing team members.
- The HCEA President and the Executive Director of Human Capital and Financial Solutions will meet in advance of formal sessions to coordinate planning, develop the proposed conferencing schedule, and align on initial agenda items.
- Late January 2026: The collaborative conferencing team will hold its initial planning session to establish processes, timelines, and expectations.

Initial Topics for Reopening

Consistent with PECCA parameters, initial topics anticipated for reopening during collaborative conferencing include, but are not limited to:

- Compensation
- Benefits

Additional topics will be identified and prioritized as the conferencing process proceeds.

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

HCS and HCEA representatives conduct the collaborative conferencing process in alignment with PECCA protocols. Meeting schedules, discussion topics, and potential agreements will be developed jointly and brought to the Board, as required, for review and consideration for the next MOU.

We respectfully request your approval.

Opportunity 2030 Commitment Connection

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

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

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

From: Shannon Moody, Chief Strategy Officer

Date: January 15, 2026

Subject: Proposed Policy Revision, 2nd Read

Board Agenda Category:

- ☑ Consent Agenda
- ☐ Action Item
- ☐ Reports and Information

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

POLICY #	**POLICY TITLE**
1.300	Committees of the Board
3.210	Naming New Facilities

Opportunity 2030 Commitment Connection

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

Hamilton County Board of Education

Monitoring:	Descriptor Term:	Descriptor Code:	Issued Date:
Review: Annually, in September	**Committees of the Board**	**1.300**	**12/16/04**
		Rescinded:	Revised: **01/15/26**

In addition to the Executive Committee, the Board may create such Standing Committees and Special Committees as may be necessary and appropriate to investigate matters and to advise the Board as a whole. Before taking action on any given issue, it shall not be necessary for the Board to have first referred a matter to a committee for consideration.

Each Standing or Special Committee, once created by the Board, shall be chaired by a Board member appointed by the Chairman of the Board and filled with such other Board members as the Chairman may choose to appoint. Upon request from the Chairman of the Board, the Director of Schools shall appoint such members of the administration as may be necessary and appropriate to assist the Board committee in its tasks. Both the Chairman and the Director of Schools shall be *ex officio* members of any Committee of the Board. Standing Committees and Special Committees shall be subject to the requirements of the Open Meetings Act.

STANDING COMMITTEES

Each October, the Board of Education shall create such Standing Committees as the Board deems necessary and appropriate to advise the Board on matters pertaining to the regular business of the Hamilton County School System including personnel, finance, curriculum, property and maintenance, athletic, and any other matter related to the efficient operation of the Hamilton County School System. Each such committee shall continue to operate until dissolved by the Board.

Each Standing Committee is authorized and encouraged to meet and discuss those matters of the school system's operation that fall within its purview. In addition to any specific issues that the Board as a whole might assign, each Standing Committee should work proactively to identify and discuss matters that would aid in the efficient operation of the school system.

SPECIAL COMMITTEES

From time to time, the Board of Education may create Special Committees to investigate issues and to make recommendations to the Board as a whole. Such Special Committees shall be empowered only to address those matters delegated to them by the Board as a whole. Special Committees shall dissolve upon rendering a final report to the Board.

ATHLETIC COMMITTEE

The Board of Education has created an Athletic Committee to provide oversight to the athletic

program in the Hamilton County Schools. The committee will be chaired by a Board member and staffed by such members of the administration as may be necessary to communicate the vision of the Board to the system and the needs of the system to the Board.

The vision of the Athletic Committee is as follows:

Every student will have the opportunity to prepare mentally and physically for any situation they may face as adults, to hone self-discipline and character necessary to success in all aspects of life, and to pursue excellence, integrity, and respect that comes from honest competition through athletics.

The mission of the Athletic Committee is as follows:

The Hamilton County Board of Education is committed to providing every student in Hamilton County Schools with the opportunity to participate in high-quality interscholastic athletics. To that end, we will prioritize investment in:

- Facilities: Every arena, stadium, gymnasium, or training room in Hamilton County should be a source of pride for its student athletes, the school, and the community. We will work with community leaders, alumni, and donors to establish a standard of excellence across the entire county.
- Coaches: Coaches are vital to student athletes as leaders, mentors, and role models. They not only train the players; they mold tomorrow's leaders. Accordingly, we believe it is vitally important to recruit and retain excellent coaches and to compensate them appropriately.
- Staffing: Proper staffing is essential to ensure correct technique and safety measures in every athletic contest. This is completed by proper training, experience, leadership abilities, and the correct number of coaches that are needed for every sport.

Legal References

1. TCA 49-2-205(2)
2. TCA 8-44-102(b)

Cross References

School Board Meetings 1.400
Public Hearings 1.401

Hamilton County Board of Education

Monitoring:	Descriptor Term:	Descriptor Code:	Issued Date:
Review: Annually, in June	**Naming Permanent Facilities**	**3.210**	**02/18/16**
		Rescinded:	Revised: **01/15/26**

The permanent naming of facilities shall apply to all changes intended to be permanent in nature, including but not limited to:

1. School names
2. Mascot identity or team names
3. Libraries, cafeterias, gymnasiums, or building names
4. Any other permanently named area, program, or facility affiliated with a school.

Facilities or any permanent fixture of the school system shall be named through Board action, based upon the following criteria:

1. Schools, mascots or team names shall not be named for living persons, except for those who have rendered exemplary service to public education as recognized and attested by a vote of the Board.
2. Two schools in the system shall not be given the same name and care should be taken to avoid similar names.
3. Schools shall be named for:
    a. The area or community in which the school is located, or
    b. The street on which the school is located, or a street bordering the school site, if that street is well known in the community, or
    c. Presidents, governors or recognized national, state and local leaders who have made an outstanding contribution to the field of education.
4. A single building on a campus with multiple buildings or a specific area on the campus may be named for a living person, provided s/he has made an outstanding contribution to that school. The naming of such building or specific area shall not supplant the facility's name.
5. Facilities other than school shall be given names which describe the facility or the geographic location in the city.
6. Temporary or informal naming (e.g., “Blue Team Hallway” or other short-term designations used for internal organization or identification is not subject to his policy unless designated as permanent.

When a ~~new school or facility~~ facility or permanent fixture is to be named or changed, the following process shall be followed:

1. Any proposed new or changed names for consideration ~~by the committee~~ may be submitted by any citizen, board member or school personnel and must be accompanied by a clear statement and justification of the proposed name or change and a petition that will include a minimum of 50 signatures from the community representing that school zone

2. The chairperson will appoint a committee composed of the Board member in whose district the facility is located, community supporters of the school, alumni, faculty members, students, and the school principal.
3. A public comment period or community forum shall be held to gather input before any formal recommendation is made.
4. The committee chairperson shall submit a recommendation to the Board along with supporting reasons and the petition for its consideration and approval at a regular meeting. The Board will vote on the new name at the next scheduled meeting.

The Board may determine that all recommendations for names be considered at a specific time of the year. The final decision on all names shall rest with the Board.

Legal References

1.

Cross References

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

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

From: Dr. Neelie Parker, Chief of Opportunity and Access
Fannie Moore, Charter School Coordinator

Date: January 15, 2026

Subject: Amendment Recommendation for Skillern Elementary-Vote

Board Agenda Category:

- ☐ Consent Agenda
- ☑ Action Item
- ☐ Reports and Information

Board to vote on the updated amendment recommendation for Skillern Elementary

Opportunity 2030 Commitment Connection

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

Hamilton County Schools (HCS)

Charter School Amendment Application Recommendation Report

January 2026

Name of School

Ivy's Skillern Elementary School

Evaluation Team

Jim Boles, Director of Access and School Choice, HCS
Michelle Eargle, Executive Director of Exceptional Education, HCS
Mary Ellen Heuton, Chief Financial Officer, HCS
Fannie Moore, Charter Schools Coordinator, HCS
Dr. Neelie Parker, Chief of Opportunity and Access, HCS
Dr. John Rice, Director of 6-12 Teaching and Learning, HCS
Dr. John Thomas, Federal Programs Coordinator, HCS

Introduction

Charter schools are public schools operated by independent, non-profit governing bodies that are granted greater autonomy in the areas of curriculum, calendar, staffing, methodology, and pedagogy in return for greater accountability in achieving high quality academic results with their students. In Tennessee, students who attend charter schools are measured against the same academic standards as students in other public schools and are required to use the same state-approved assessments as all other public schools. Charter schools are required to serve all eligible students, with the education of at-risk students being of utmost importance.

In accordance with Tennessee Code Annotated (T.C.A.) § 49-13-110(d), the governing body of a charter school may petition its authorizer to amend its charter agreement. A charter school may submit an emergency amendment petition at any time when good cause exists due to unanticipated or extraordinary circumstances. The charter school's governing body must submit a background statement that includes detailed written findings explaining the unanticipated or extraordinary circumstances giving rise to the emergency amendment petition. It is the responsibility of a quality authorizer to establish and apply a rigorous, fair, and thorough amendment review process to ensure that any approved amendments meet or exceed the standards set by the Tennessee State Board of Education.

Charter schools are required to provide appropriate curriculum, aligned professional standards, engaging models of parental and partnership programs, and strategic planning to leverage and grow resources for the school. Schools are held accountable for academic results, responsible school leadership, sound fiscal and operational management, and adherence to the laws and rules that govern education in their state of residence.

Evaluation Process

Charter school emergency amendment applications are evaluated by a review team of internal reviewers who are qualified to assess the academic, operational, and financial implications of proposed changes to an existing charter agreement. Emergency amendment petitions are reviewed in accordance with Tennessee charter policy, which limits emergency consideration to circumstances that are presented as unanticipated and extraordinary and that require review outside of the standard amendment window.

Evaluators examine specific components of the application, including Exceptional Education, English Language learners, business and finance, curriculum and instruction, facilities, transportation, enrollment planning, and strategic capacity, as well as the amendment application as a whole. Particular attention is given to whether the proposed amendment is consistent with the school's approved charter agreement and whether approval is in the best interest of students, families, and the community.

Evaluation Process

This recommendation report is the culmination of the following stages of review for an emergency charter amendment petition:

- **Application review**
  The evaluation team conducts a comprehensive review of the emergency amendment application submitted by an existing HCS approved charter school. The review examines the proposed enrollment increase from multiple perspectives, including, but not limited to, academic performance and capacity, enrollment trends, strategic planning, culture, Exceptional Education and English Language learner services, curriculum and instructional approach, facilities readiness, operational capacity, budgets, and overall financial sustainability.

- **Capacity Interview**
  The evaluation team invites members of the leadership team and or governing board to participate in an in person capacity interview. The purpose of the interview is to allow the school to provide additional context for the emergency request, respond to clarifying questions, and explain how the proposed enrollment increase would impact the operation of the school. Information gathered during the interview informs the team's assessment of the school's readiness to implement the proposed amendment and its ability to sustain the change over time.

For this emergency amendment petition, a separate capacity interview was not conducted following submission of the application. A capacity interview was previously conducted on November 4 during the Fall Amendment window, at which time the charter school operator submitted an amendment application to increase grade levels and student enrollment. Following the capacity interview, the charter school operator elected to withdraw the Fall amendment application. The emergency amendment application did not introduce new information, changes, or evidence beyond what was previously reviewed during the Fall amendment process that would warrant additional questions or require further clarification. As a result, an additional capacity interview was not conducted.

- **Consensus Conclusion**
  Following the application review and capacity interview, the evaluation team meets to discuss findings and arrive at a consensus recommendation to approve or deny the emergency amendment request. Consensus is defined as a majority of the review team being in agreement with the final recommendation.

Rating Characteristics

Meets the Standard

The response thoroughly addresses key issues. The proposed amendment clearly aligns with the mission and goals of the school. The response includes specific, evidence-based information that shows thorough preparation and viability of the plan.

Does Not Meet Standard

The response is substantially incomplete; demonstrates lack of preparation; is unsuited to the mission and goals of the school; or otherwise raises significant concerns about the viability of the plan or the applicant's ability to implement it.

Amendment Petition Scoring Criteria

Characteristics of a strong response:

- Clear, evidenced-based rationale for the proposed amendment that is aligned with the school's mission and goals, and supports the best interest of students.
- Academic results provide compelling support for the proposed amendment. (For Subparts B, C, F, G, and H only)
- Realistic and detailed budget that explains the financial impact of the proposed amendment and clear evidence that the financial outlook of the school supports the costs associated with the proposed amendment.

- Thoughtful and realistic facility plans that accommodate the proposed amendment. (For Subparts B, C, and E only).
- Detailed implementation plan with a realistic timeline that addresses the operational impact of the proposed amendment.
- Clear evidence of support for the proposed amendment from parents, staff and community partners.
- FOR EMERGENCY PETITIONS ONLY: Compelling evidence of unanticipated extraordinary circumstances supporting the filing of an emergency amendment application.

Evaluation Contents

This evaluation report includes the following:

- **School Overview**
  A summary of the emergency amendment request as presented in the application, including the proposed change to student enrollment.

- **Executive Summary**
  An overall judgment, based on extensive analysis of all evidence presented by the charter school operator, regarding whether the emergency amendment request meets the criteria for approval.

  The analysis of the emergency amendment request is based on the following areas:
  - **General Information**
    Identification of the amendment petition category and subpart under which the charter school operator is applying, along with relevant background information about the school.
  - **Specific Amendment Subpart(s)**
    This amendment application focuses on Subpart C Student Enrollment. This subpart is completed by charter school operators seeking approval to change student enrollment outside of the minimum or maximum enrollment thresholds established in the charter agreement. A narrative response and supporting documentation addressing each question within the subpart are required.

Sustaining a successful, high performing charter school requires a complete and coherent plan. Strength in one area cannot compensate for weaknesses in another. Accordingly, in order to receive a positive recommendation, the school must meet or exceed the standard in all major areas of review, including academic capacity, operational readiness, and financial sustainability, as well as the requirements specific to an emergency amendment petition.

School Overview

School Name: Ivy Skillern's Academy

Mission
The mission of Ivy Academy's Skillern Elementary is to cultivate the body, mind, and heart of each student through a classical, content-rich education that nurtures moral and civic virtue in an immersive, outdoor environment.

Location
The school is located on Dayton Pike. Students in K-1 are housed in a new building on the Rich Campus and students in grades 3-5 are housed in portables. The proposed plan allows for any additional students who are in K-5 to enter the current locations.

Current Enrollment
The school's current enrollment is 364 for grades K-4. The approved charter indicates that the maximum number of students enrolled at Ivy Academy's Skillern Academy is 408 students.

2025-2026	K	1st	2nd	3rd	4th
Number per class/grade	18 X 4 72	20 X 4 80	21 X 4 84	22 X 4 84	22 X 2 44

Proposed Growth By Year

Grade Level	Year 1 22-23	Year 2 23-24	Year 3 24-25	Year 4 25-26	Year 5 26-27	At Capacity 27-28
K	16 X 2 = 32	18 X 4 = 72	72	72	72	72
1	16 X 2 = 32	80	80	80	80	80
2	0	42	84	84	84	84
3	0	0	44	84	84	84
4	0	0	0	44	84	84
5	0	0	0	0	44	88
6	0	0	0	0	0	0

7	0	0	0	0	0	0
8	0	0	0	0	0	0
9	0	0	0	0	0	0
10	0	0	0	0	0	0
11	0	0	0	0	0	0
12	0	0	0	0	0	0
Totals	64	194	280	364	448	492

Executive Summary

In reviewing an emergency charter amendment request, the review team considers whether the request meets the standard outlined in Tennessee charter policy, which defines emergency amendments as those arising from unanticipated, extraordinary circumstances requiring immediate action to protect students and ensure the continued operation of the school. In addition, the review team evaluates whether the proposed amendment is consistent with the school's approved charter agreement and whether approval is in the best interest of students, families, and the broader school community.

Although the circumstances described in Ivy Academy's Skillern Elementary's application do not meet the definition of an emergency under Tennessee charter policy, HCS accepted the request for consideration as an emergency petition in order to allow the amendment to be reviewed outside of the defined amendment window, as requested by the charter school operator.

After a thorough review of Ivy Academy's Skillern Elementary's emergency amendment application, the review team has determined that the request, as submitted, does not meet the standards required for approval.

Ivy Academy's Skillern Elementary is an existing charter school serving students in grades K through 4, with a current enrollment of 364 students and an approved maximum enrollment of 408 students. The school operates as part of a K through 12 pipeline model, with a clearly articulated and previously approved agreement granting Ivy Academy's Skillern Elementary students admission preference to Ivy Academy upon promotion out of elementary. This admission preference was a central and explicit component of the original charter application and remains a material element of the school's model and commitment to families.

The emergency amendment seeks approval for a significant enrollment increase of approximately 20 percent beyond what was originally contemplated in the charter agreement. The review team notes that enrollment growth has been occurring for approximately 2.5 years, raising questions about why this request is being presented as an emergency at this time. Additionally, the school previously indicated through an amendment application submitted in the fall that the board had discussed and approved submitting an amendment during the August 2025 board meeting, but chose to withdraw the amendment application following a capacity interview with the HCS review team. These factors further support the conclusion that the circumstances were not unanticipated or extraordinary.

While the review team acknowledges several strengths, including a robust waitlist, strong English Language Arts performance relative to the district, solid overall academic outcomes, and a clean independent audit, the audit also reflects a negative unrestricted net position, indicating that the school has limited financial cushion to absorb unanticipated costs or enrollment related pressures. This raises concern when considered alongside the proposed enrollment increase and the absence of a clearly articulated plan to address increased operating demands.

Most notably, the proposed enrollment increase creates a direct conflict with Ivy Academy's Skillern Elementary's charter agreement and the expectations set for families. Increasing elementary enrollment without a corresponding and clearly articulated plan for Ivy Academy would result in students who are no longer able to matriculate with the admission preference that families were promised. The application does not address what happens to students who are unable to enroll in Ivy Academy, nor does it provide evidence that this plan has been coordinated with or approved by Ivy Academy. The review team finds that shifting this burden onto families and Ivy Academy is not in the best interest of students.

Additionally, the application contains internal inconsistencies related to financial sustainability. The school asserts that increasing class size is necessary to maintain a sustainable model while simultaneously stating that the school is currently in a strong financial position. The financial projections primarily reflect inflationary cost increases of approximately 3 percent and show salary increases for existing staff, but do not reflect increases in staffing that would reasonably be expected with a substantial increase in student enrollment. This raises concern that projected expenses may be understated, particularly given the likelihood of increased costs associated with staffing, Exceptional Education services, English language learner supports, instructional materials, and operational needs tied to higher enrollment.

With the school reporting a current Exceptional Education population of approximately 25 percent, even a modest enrollment increase would necessitate additional Exceptional Education staffing, further increasing expenditures. However, the application does not clearly

demonstrate how these additional costs would be absorbed given the school's limited unrestricted reserves.

The review team also notes that specific math performance data was not provided in the current application, despite explicit feedback during the prior amendment capacity interview identifying the absence of this data as a concern. As a result, the previously identified questions related to math performance remain unaddressed. In addition, the application does not provide sufficient information describing how the school will adapt its staffing, including teachers, educational aides, special population staff, and other support staff, to accommodate the proposed change in enrollment, nor does it clearly describe how the school will ensure the recruitment, enrollment, and retention of students with disabilities and English Language learners within the school's target population.

Finally, the application acknowledges that the school previously received a *falls far below* rating for current assets due to the intentional use of reserves during periods of expansion. The review team finds this explanation concerning in light of the additional costs associated with increased enrollment, including textbooks, furniture, instructional materials, facilities, and staffing, particularly when combined with the school's negative unrestricted net position and limited demonstrated capacity to absorb enrollment driven cost increases.

Based on the totality of the evidence, the review team concludes that Ivy Academy's Skillern Elementary's emergency amendment request does not meet the requirements for approval, raises unresolved concerns regarding academic impact, operational capacity, financial sustainability, and student matriculation to Ivy Academy, and is inconsistent with the school's approved charter agreement. As a result, the amendment application, as written, does not meet the standards required for approval.

TENNESSEE
STATE BOARD OF EDUCATION

Charter School

Amendment Petition

Instructions for Petitioning to Amend a Charter Agreement

In accordance with Tennessee Code Annotated (T.C.A.) § 49-13-110(d), the governing body of a charter school may petition its authorizer to amend its charter agreement. Timelines for review and the appeals process are defined by Tennessee Public Charter School Commission (Charter Commission) Rule 1185-01-01-.04.

Below are the steps that a charter school shall follow to complete and submit a petition to amend a charter agreement. Directions for submitting a Letter of Intent are available on the Tennessee State Board of Education's (State Board) website.

1. **All applicants complete Part I "General Information" of the application below**, including:
   a. Selecting the amendment petition category, as indicated in the submitted Letter of Intent;
   b. Providing the requested School Background information;
   c. Providing the Background Statements and related attachments for each amendment that is requested; and
   d. Signing of the completed application by both the Contact Person and Board Chair.
2. **Applicants ONLY complete the subpart(s) in Part II "Specific Amendment Requests" that applies to the category of amendment the school is seeking**. The subparts contain more specific questions relevant to the identified category. If a school is seeking multiple amendments, the school shall complete the applicable subpart for each requested amendment category. A school should include any attachments requested by the applicable subpart.
3. An application for a single amendment, including Parts I and II, must not exceed 15 single-spaced pages, with one-inch margins and 12-point font, excluding attachments. The maximum page limit increases by 5 pages for each additional amendment sought by the applicant. For example, if a school is applying for 2 amendments, the maximum page limit (excluding attachments) is 20 pages.
4. The completed application and all attachments shall be submitted in PDF form to the authorizer.
5. Failure to submit a complete application, including attachments, to the authorizer by the deadlines listed below will result in the amendment application not being reviewed by the authorizer.

Deadlines:

If the Letter of Intent was submitted by **September 1**, the application is due by **October 1**. If the Letter of Intent was submitted by **January 15**, the application is due by **February 14**. If the due date falls on a Saturday, Sunday, or state-observed holiday, the due date shall be the next business day.

Emergency Amendment Petitions:

A charter school may submit an emergency amendment petition **at any time** if good cause exists for an amendment due to unanticipated or extraordinary circumstances. In addition to the category of amendment, the school should check "EMERGENCY Petition" at the bottom of the first page of Part I and briefly describe the circumstances constituting the emergency. The Background Statements shall

include detailed written findings explaining the unanticipated or extraordinary circumstances giving rise to the emergency amendment petition.

Timeline for Review:
The authorizer must rule on an amendment petition within 60 days of its due date, or within 60 days of the date of submission of an emergency petition. If the authorizer fails to do so, the school's amendment petition shall be deemed approved. If the school's petition is denied, the school may appeal the decision to the Charter Commission. See the Charter Commission Rule 1185-01-01-.04 for more details regarding the appeals process.

Ratings and Criteria:
Charter Commission Rule 1185-01-01-.04 requires the Tennessee State Board of Education (State Board) to develop a scoring rubric for use in evaluating petitions to amend the charter agreement. Evaluators will use the following criteria to rate each amendment for which a petition is received:

Rating	Criteria
Meets or Exceeds the Standard	The response thoroughly addresses key issues. The proposed amendment clearly aligns with the mission and goals of the school. The response includes specific, evidence-based information that shows thorough preparation and viability of the plan.
Does Not Meet Standard	The response is substantially incomplete; demonstrates lack of preparation; is unsuited to the mission and goals of the school; or otherwise raises significant concerns about the viability of the plan or the applicant's ability to implement it.

Recommendations for approval or denial of each amendment requested in an amendment petition will be based on the materials submitted as well as the authorizer's independent due diligence.

Amendment Petition Scoring Criteria
Characteristics of a strong response: ● Clear, evidenced-based rationale for the proposed amendment that is aligned with the school's mission and goals, and supports the best interest of students. ● Academic results provide compelling support for the proposed amendment. (For Subparts B, C, F, G, and H only) ● Realistic and detailed budget that explains the financial impact of the proposed amendment and clear evidence that the financial outlook of the school supports the costs associated with the proposed amendment. ● Thoughtful and realistic facility plans that accommodate the proposed amendment. (For Subparts B, C, and E only) ● Detailed implementation plan with a realistic timeline that addresses the operational impact of the proposed amendment. ● Clear evidence of support for the proposed amendment from parents, staff and community partners.

- FOR EMERGENCY PETITIONS ONLY: Compelling evidence of unanticipated extraordinary circumstances supporting the filing of an emergency amendment application.

Amendment Petition Review Summary	
☐ Meets or Exceeds Standard	X Does Not Meet Standard

Strengths	Page
• Robust waitlist • ELA data is a strength • Performing at or above the district in ELA and math • No findings were listed on the independent audit	

Concerns/Questions	Page
• Emergency petition - increased enrollment has been happening for 2.5 years. Why is it an emergency now? Emergency petitions are meant for unanticipated extraordinary circumstances as stated in the Tennessee's Charter School Amendment Petition. o Furthermore, there was an amendment application submitted in the Fall that stated the Skillern Board discussed and approved for an amendment application to be submitted during the August 2025 board meeting. • Lack of math data was discussed during the last amendment application capacity interview; however, no additional data was provided within the current application. • The application contradicts itself - The argument to increase class size is that if an increase is not granted then the model is not sustainable; however, the application also reinforces the notion of having sound finances and that the school is in a good place financially. • Question 2 states that the school would add sections to create a financially stable model which leads to the following question/concern: o If class sizes stay the same and sections are added then that would mean that expenses would be increased since additional teachers would be needed. Furthermore, the budget shows pay increases, but does not show an increased number of employees. o Adding to existing classrooms could help financially, but adding additional sections adds to the financial burden (increases staffing needs, Ex Ed, ESL, etc.) • Question 3 (page 4) - Documentation has not been provided to support the need for an increase in enrollment outside of the waiting lists. There is no indication that this plan has been communicated with Ivy Academy. • On page 4 of the submitted application, the last sentence states, "For a charter school in a good standing, a modest enrollment increase should not present a burden or concern for central office staff or the board." The concern is not that an increased	

burden would be placed on central office staff or the board; rather, the concern is that an increase in enrollment would shift the burden to families who may no longer be able to matriculate to Ivy Academy as originally expected and to Ivy Academy, which would then face its own enrollment capacity and charter agreement implications. o A 20% enrollment increase is not a modest increase. ● Page 4 - the questions that were raised during the Fall Capacity Interview remain unanswered - the application does not provide any insight on what happens to the students who cannot enroll in Ivy Academy like they once thought possible. o This request is in violation of Ivy Academy's Skillern Elementary's charter agreement because not all students will be able to matriculate into Ivy Academy. ● If the school's Exceptional Education ratio remains consistent with current levels of approximately 25%, as noted on page 8 of the application, the proposed enrollment increase would require, at a minimum, the addition of one Exceptional Education teacher, assuming a ratio of one Exceptional Education teacher for every 20 students. This represents a minimum staffing increase, as additional or more intensive student support needs could necessitate further staffing. o This further supports the inherent conflict within application. ● Question 7 - The question was not addressed. ● Question 8 - The question was not addressed ● Question 9 - "However, during periods of grade-level expansion, when we must invest in new textbooks, furniture, instructional materials, and facility additions, reserves are intentionally used to build program quality and campus capacity rather than accumulated. As a result, we received a "falls far below" rating for current assets last year." - Increased enrollment would require additional expenses mentioned within the application. ● The audited financials indicated a negative unrestricted net position. ● The submitted financial documents show inflationary cost increases (3%); however, there is no evidence of financial planning items that would increase due to the increased number of enrollments. Therefore, the current plan may be underprojecting expenses.	

Amendment Petition Checklist

The following components make up a complete amendment petition and shall be submitted to the school's authorizer:

- ☐ Letter of Intent (unless an Emergency Petition)
- ☐ Part I of the application (fill in the blanks, check the applicable box(es) and provide the Background Statements)
- ☐ Most recent audit*
- ☐ Balance sheet for the fiscal quarter ending thirty (30) or more days prior to submission of the petition*
- ☐ Budgets for the current and two (2) succeeding fiscal years, assuming approval of the amendment
- ☐ Written communications with stakeholders regarding the proposed amendment
- ☐ Governing body meeting minutes approving the amendment and vote results
- ☐ Executed Signature Page
- ☐ Responses to questions in the applicable subpart(s) in Part II

* This is not required if the amendment application is submitted prior to the charter school's first year of operation.

TENNESSEE
STATE BOARD OF EDUCATION

Charter School

Skillern Elementary

Amendment Petition

TENNESSEE
STATE BOARD OF EDUCATION

Petition to Amend a Charter Agreement

Part I: General Information (Required for All Applicants)

Name of Charter School Ivy Academy's Skillern Elementary

Amendment Petition Category, as identified in the Letter of Intent:

Check the box for the category under which this Amendment Petition falls

- ☐ Change in governance structure (including, but not limited to, a change in the nonprofit entity governing the school), or addition of or changes to the charter management organization
- ☐ The addition or removal of a grade level or levels
- ☑ Changes in student enrollment which fall outside of the minimum or maximum enrollment thresholds set forth in the charter school's charter agreement
- ☐ The addition or removal of a plan to provide transportation to students attending the charter school
- ☐ Changes to the charter school's location, if outside the geographic area set forth in the charter agreement
- ☐ Changes to the charter school's academic focus or goals set forth in the charter agreement
- ☐ Changes identified in the charter agreement as material modifications or amendments. Please specify:

  _____
- ☐ Other material changes not covered by any of the above categories. Please specify:

  _____
- ☑ EMERGENCY Petition. Please briefly describe the emergency: After consideration and consultation, we need to submit this amendment now, have it reviewed and voted on in January so the correct number of seats can be open at lottery at the time. The alternative of this January review would give a temporary false lottery result to families if not approved by the time the lottery is drawn in February, 2026, causing them to have to take their second choice. We need to do our best to serve families well and not cause them additional stress in choosing a school. Deferring this process, and only generating a waiting list, would not provide the best service to our county's families for their school of choice.

School Background

Provide the following information about your school:

a) Campus address 8459 Springfield Road and 8443 Dayton Pike, Soddy-Daisy, 37379
b) First school year in operation: 2022 -2023
c) Grade levels and enrollment currently serving: K-4th
d) Grade levels and maximum enrollment to be served at maturation of charter agreement, if different: Agreement: 408 Requested 492 at max SY 2026-2027 at 436
e) End of current charter term: SY 2031 - 2032

Background Statements

This is a petition to amend a school's charter agreement by changing the item selected above. Please submit a narrative response and related attachments addressing the questions below.

1. **Provide details on the selected amendment above and describe the requested change, including the school's rationale for the proposed change. Describe any plan that is already underway to prepare for the proposed amendment.**

   Our approved charter application had a 16 – 18 student per class model. We tried that and it did not work financially. It caused a deficit. We needed to raise our classroom sizes to 18 (K) and up to an average of 20 (for above K). This will increase our overall enrollment from the approved 408 up to 492 (84 students more), when we are fully grown and at maximum enrollment.

2. **How will the proposed amendment support or enhance the school's mission and goals?**

   We have exceeded expectations for our first three operating years with this class size of 18 to an average of 20. According to family surveys, our parental satisfaction rate is 92% or higher annually. Our teacher retention rate has been 95% or higher, and our first TCAP results places us in the top 18% of public schools in the state as far as third grade ELA, which is a major emphasis within our state and county. The results we have justify increasing our enrollment to the aforementioned number so we can maintain this student per class model once we completed our grade growth pattern and have all sections of all grade levels in order to have a financially sustainable model.

3. **Describe how the proposed amendment will impact the school's finances. Explain any anticipated revenues or expenses arising from the proposed change. If expenses are anticipated, explain how the school will finance them. Please attach the school's (i) most recent audit, (ii) balance sheet for the fiscal quarter ending thirty (30) or more days prior to submission of the application, and (iii) budgets for the current fiscal year and two (2) succeeding fiscal years assuming the proposed amendment is approved.**

   The proposed amendment enables us to have the number of students needed and the funding that follows them to support the necessary staff for excellent academic results.

Conversely, a class size model of less than what is requested does not allow us to do that. Having a population of 30%+ of SWD, requires a larger investment on the front end (before TISA ULC additional reimbursements come the year after the services are rendered and paid for), so our population is more costly to service than a setting with a more average SWD percentage of 12% to 20%. Having a few more students per class enables us to provide the services and have a balanced budget.

4. **How has the school informed its external stakeholders (e.g. local school board representatives, neighbors, community partners) and internal stakeholders (e.g. staff, parents) of the proposed amendment? Please attach any written communication (e.g., meeting minutes). Describe any notable support for or opposition to the proposed amendment. If concerns have been brought to the school or governing board's attention, what is the plan to address them?**

   The board meeting minutes and parent memo documenting this communication are attached. There will be no change for families. We will continue to maintain the same class sizes we have had for the past 2.5 years. As our enrollment grows by grade level, we will exceed the maximum student enrollment outlined in our approved charter application. The proposed adjustment represents a modest increase, 84 additional students, and does not alter the overall educational model. Families are satisfied with our current class sizes, and we have shared at parent meetings that we are requesting approval to extend these same class sizes across additional sections as enrollment continues to grow. We communicated that increased enrollment is being sought specifically to preserve the classroom experience our families expect.

5. **When did the school's governing board approve the proposed amendment? Please attach minutes from the meeting and vote results.** December 17, 2025

6. **FOR EMERGENCY PETITIONS ONLY: Explain the unanticipated extraordinary circumstances giving rise to the emergency amendment application. Identify when these circumstances were first discovered and brought to the attention of the governing board. Why did the governing board determine that the circumstances constituted an emergency that warranted the filing of an emergency petition?**

   We intended to submit this request in a timely manner, and did, but had included a grade expansion plan with the request. There were several questions raised about the grade expansion plan, some hypothetical.

   Based on the questions raised by the evaluation team, our founder concluded that the district had sufficient reservations about the proposed grade expansion to potentially recommend denial of the amendment request. However, approval of the enrollment increase was needed in advance of this fall's lottery drawing, and we could not risk a delay or denial.

After consulting with state-level advisors and to ensure timely approval, we chose to withdraw the original petition, remove the grade expansion component and resubmit a streamlined request focused solely on increasing enrollment through an emergency petition. This approach allows the amendment to be considered and approved prior to the lottery drawing or at least publication, which is essential for families applying through the HCS choice lottery system. It also addresses any hesitation the central office evaluation team may have had regarding the broader scope of the original request. The review, questions, and vote can take place prior to the families being notified on February 13th. For a charter school in good standing, a modest enrollment increase should not present a burden or concern for central office staff or the board.

We plan to revisit the grade expansion request at a later date after further review and planning.

This completed and signed form and all attachments shall be saved as a PDF and submitted to the charter school's authorizer.

Continue to Part II

Subpart C – Student Enrollment
ONLY complete if applying to amend enrollment

Amendments Covered by this Subpart: A charter school should use this Subpart C to apply for a change in student enrollment outside of the minimum or maximum enrollment thresholds set forth in its charter agreement.

Application: Please submit a narrative and related attachments addressing each of the questions below. If a question is inapplicable, mark it N/A.

1. **What is the school's current enrollment by grade level and by year of the charter agreement?**
   The school's current enrollment is 364 students as shown in the below table. We only have grades K – 4th. We were approved for 408 students in our charter application. This round of the lottery and resulting enrollment will bump us up to 436 students (28 students over our approved number for fall 2026).

2025 - 2026	K	1st	2nd	3rd	4th
Number per class/grade	18 X 4 72	20 X 4 80	21 X 4 84	22 X 4 84	22 X 2 44

2. **How will a change in enrollment improve the school's existing program and benefit students?**
   The change in enrollment will allow us to have the needed number of students per classroom to continue providing the same quality service and excellent results that we have been delivering for the past two years with these same class sizes, it is just that now there are more classes of this size, and we will go over our approved maximum enrollment. The first year we only had 16 students per class, resulting in a financial deficit, which is not sustainable.
3. **Describe and attach documentary evidence of the demand for this enrollment change. How does the scope, pace, and need for this enrollment change align with current demographic and growth projections in the city?**
   Our waiting lists are included as an attachment. This evidence demands that we at least increase our enrollment in keeping with the class sizes we have had these past 2.5 years, as does our academic data. This is a school that serves all demographics well. We serve 25% - 30%+ of SWD and 26% ED, and our retention rate is over 95% each year. As far as growth projections, our county is expected to continue migration growth through 2030.
4. **Describe the school's post-lottery enrollment/waiting list process.**
   After the lottery is run, we have a sibling waitlist that we draw from, as well as a homeschool waitlist that we draw from. This is at the request of the district to pull from the homeschool community before pulling from district schools. The number of seats open over the course of the year averages ten or less.

5. **Discuss the school's enrollment trends over the past three (3) years, including any waitlist information.**
   We always have a robust waitlist. It has held steady or increased annually for our four years of starting off a school year.
6. **How will the school adapt its physical space to accommodate a change in enrollment?**
   Ever since year one when we had a financial deficit, we have planned for class sizes from 18 up to an average of 20. We have already planned for these larger class sizes. No need to adapt the physical space to accommodate. It is accommodated already in our growth plan. We are setting a 7-plex modular unit in April 2026 for fall 2026's growth, and beginning construction again on the next permanent building in July 2026 to be occupied by fall 2027. It is a duplicate of our current building, which took us 9.5 months to construct, during a spring with the wettest May on record for our area. All municipal permitting has been secured for both projects. Financing secured and payments begin in March for the modular unit.
7. **How will the school adapt its staffing (e.g., teachers, educational aids, special population staff, other support staff, etc.) to accommodate the change in enrollment?**
   We have been operating with these class sizes since the 2023 – 2024 school year. Parents expect that size. Again, there is no need to adapt from our current plan.
8. **Describe ways that the school ensures recruitment, enrollment, and retention of students with disabilities and English language learners, along with the school's target population.**
   We wrote the charter to provide an effective and rigorous program different from other options that previously existed in our county. That is our target audience, families who want a more academically challenging setting. Our literacy program has the best data of any literacy curricula, and it is challenging to most students. Our families who were looking for that are pleased as is evidenced by our retention rate and our TCAP scores. Our girls in particular are scoring well. When a student has diverse learning needs, parents seek non-standard settings. Thus, we have a large population of students who are neurodivergent. We have an ENL population on par with the suburban and rural areas of our county. We happily, efficiently, and effectively serve whoever comes to us, and they don't leave. Our retention rate has been 95% or higher annually.
9. **How does the school's record of achievement support the approval of this amendment? For purposes of this question, the authorizer will review various metrics of success, including but not limited to the school's scores on TVAAS, TNReady and the authorizer's school performance framework, as well as the school's financial information and duration of operations.**
   The 2024–2025 school year was our first year with state assessment data; therefore, a TVAAS growth score was not generated. A minimum of two years of data is required to calculate growth. Our initial achievement results were strong for a start-up school. We earned the highest third-grade ELA scores among elementary charter schools in the district and ranked in the top 18 percent statewide. Our math performance was slightly above average but did not meet our internal expectations. In response, we conducted classroom observations, engaged a curriculum expert, and identified areas for improvement. As a result, we have

already designed targeted professional development for January 2026 and summer 2026 to ensure math outcomes align with or exceed our ELA performance.

With class sizes already operating at the levels proposed in this amendment request and with demonstrated academic results, our performance record supports approval of this petition.

Our financial position is sound. We have no material audit findings and continue to increase assets annually. However, during periods of grade-level expansion, when we must invest in new textbooks, furniture, instructional materials, and facility additions, reserves are intentionally used to build program quality and campus capacity rather than accumulated. As a result, we received a "falls far below" rating for current assets last year.

For this reason, we believe the current state performance framework would benefit from modification to more accurately assess financial stability for schools in active grade-growth phases, particularly with respect to current and long-term asset metrics. Our founder has communicated this concern extensively to the State Board of Education, and we are hopeful that future revisions will address this issue.

10. **Complete the proposed enrollment summary for each grade level and each year remaining in the charter agreement in the tables below.**

Number of Students

Grade Level	Year 1 2022 - 2023	Year 2: 2023-2024	Year 3: 2024-2025	Year 4: 2025-2026	Year 5: 2026-2027	At Capacity: 2027-2028
K	16 X 2 =32	18 X 4 =72	72	72	72	72
1	16 X 2 =32	80	80	80	80	80
2	0	42	84	84	84	84
3	0	0	44	84	84	84
4	0	0	0	44	84	84
5	0	0	0	0	44	88
6	0	0	0	0	0	0
7	0	0	0	0	0	0
8	0	0	0	0	0	0
9	0	0	0	0	0	0
10	0	0	0	0	0	0
11	0	0	0	0	0	0
12	0	0	0	0	0	0
Totals	64	194	280	364	448	492

Anticipated Demographics

% of Economically Disadvantaged Students	% of Students with Disabilities	% of English Language Learners
25-30% Currently 26.5%	20 – 30% Currently 25% with enough in the evaluation process to raise it to 30%	<5%

TENNESSEE
STATE BOARD OF EDUCATION

Signature Page

By our signatures below, we hereby certify that the governing body of the charter school identified herein has approved the submission of this petition to amend a charter agreement.

Angela R Markum
Contact Signature

Ronald E Jones Sr
Board Chair Signature

Angela R. Markum, Founder & CEO
Contact Name & Title

Ronald E. Jones, Senior
Board Chair Name

amarkum@skillernelementary.com
Contact Email Address

rjones@skillernelementary.com
Board Chair Email Address

12/17/25
Date

12/17/25
Date

This completed and signed form and all attachments shall be saved as a PDF and submitted to the charter school's authorizer.

Continue to Part II

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL

ANNUAL FINANCIAL REPORT

YEAR ENDED JUNE 30, 2025

JOHNSON, MURPHEY & WRIGHT, P.C.
CERTIFIED PUBLIC ACCOUNTANTS
CHATTANOOGA, TENNESSEE

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IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
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June 30, 2025

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IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Roster of Officials
June 30, 2025

Chief Executive Officer	Angie Markum
President	Ron Jones
Secretary	Sherrie Ford
Treasurer	Kathy Wilson
Director	Dr. Patti Skates
Director	Victoria Blevins
Director	Corey Holloway
At-Large	Nilca Billow
At Large	Kathleen Holloway

II. FINANCIAL SECTION

Certified Public
Accountants

301 N. Market
Chattanooga, TN
37405

Office: 423-756-1170
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Members
American Institute
of Certified
Public Accountants

Paul Johnson, III, CPA

Brian T. Wright, CPA

Marianne Hart, CPA

Stuart Johnson, CPA

INDEPENDENT AUDITOR'S REPORT

Board of Directors
Ivy Academy's Skillern Elementary School

Report on the Audit of the Financial Statements

Opinions

We have audited the accompanying financial statements of the governmental activities and the major fund of Ivy Academy's Skillern Elementary School, as of and for the year ended June 30, 2025, and the related notes to the financial statements, which collectively comprise Ivy Academy's Skillern Elementary School's basic financial statements as listed in the Table of Contents.

In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities and the major fund of Ivy Academy's Skillern Elementary School, as of June 30, 2025, and the changes in financial position for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinions

We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of Ivy Academy's Skillern Elementary School and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about Ivy Academy's Skillern Elementary School's ability to continue as a going concern for twelve months beyond the financial statement date, including any currently known information that may raise substantial doubt shortly thereafter.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinions. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards and *Government Auditing Standards* will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgement made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards and *Government Auditing Standards*, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of Ivy Academy's Skillern Elementary School's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgement, there are conditions or events, considered in the aggregate, that raise substantial doubt about Ivy Academy's Skillern Elementary School's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we have identified during the audit.

Required Supplementary Information

Accounting principles generally accepted in the United States of America require that the Management's Discussion and Analysis, Schedule of Proportionate Share of the Net Pension Liability (Asset) - Teacher Legacy Pension Plan of the TCRS, Schedule of Contributions - Teacher Legacy Pension Plan of the TCRS, Schedule of Proportionate Share of the Net Pension Liability (Asset) - Teacher Retirement Plan of the TCRS, Schedule of Contributions - Teacher Retirement Plan of the TCRS, Schedule of Changes in Net Pension Liability (Asset) and Related Ratios Based on Participation in the Public Employee Pension Plan of the TCRS - Hamilton County Retirement Plan (with Cost Controls), and Schedule of Contributions Based on Participation in the Public Employee Pension Plan of the TCRS - Hamilton County Retirement Plan (with Cost Controls), listed in the Table of Contents be presented to supplement the basic financial statements. Such information is the responsibility of management and, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

Supplementary Information

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise Ivy Academy's Skillern Elementary School's basic financial statements. The financial schedules listed in the Table of Contents as Other Supplementary Information are presented for purposes of additional analysis and are not a required part of the basic financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. The information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the financial schedules are fairly stated, in all material respects, in relation to the basic financial statements as a whole.

Other Information

Management is responsible for the other information included in the annual report. The other information comprises the Introductory Section but does not include the basic financial statements and our auditor's report thereon. Our opinions on the basic financial statements do not cover the other information, and we do not express an opinion or any form of assurance thereon.

In connection with our audit of the basic financial statements, our responsibility is to read the other information and consider whether a material inconsistency exists between the other information and the basic financial statements, or the other information otherwise appears to be materially misstated. If, based on the work performed, we conclude that an uncorrected material misstatement of the other information exists, we are required to describe it in our report.

Other Reporting Required by *Government Auditing Standards*

In accordance with *Government Auditing Standards*, we have also issued our report dated November 10, 2025, on our consideration of Ivy Academy's Skillern Elementary School's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of Ivy Academy's Skillern Elementary School's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering Ivy Academy's Skillern Elementary School's internal control over financial reporting and compliance.

Johnson, Murphey & Wright, P.C.

Chattanooga, Tennessee
November 10, 2025

MANAGEMENT'S DISCUSSION AND ANALYSIS

As management of Ivy Academy's Skillern Elementary School (the School), we offer readers of the School's financial statements this narrative overview and analysis of the financial activities of the School for the fiscal year ended June 30, 2025. We encourage readers to consider the information presented here in conjunction with the financial statements.

FINANCIAL HIGHLIGHTS

The assets and deferred outflows of the School exceeded its liabilities and deferred inflows by $1,659,613 (net position). None of this amount is unrestricted net position which could be used to meet the School's ongoing obligations.

The change in net position for the year was an increase of $410,944.

As of the close of the current fiscal year, the School's General Fund reported an ending fund balance of $277,278. Approximately 64.39%, or $178,552 is restricted for specific purposes. The remaining 35.61%, or $98,726 is available for spending at the School's discretion (unassigned fund balance).

At the end of the current fiscal year, unassigned fund balance for the General Fund was 1.47% of total General Fund expenditures.

The School received $551,473 in federal and state awards.

State funding increased $1,261,064 over the previous year due to the School adding more students to their enrollment.

During the year, the School borrowed $2,674,853 in order to fund building costs of a new campus.

OVERVIEW OF THE FINANCIAL STATEMENTS

This discussion and analysis is intended to serve as an introduction to the School's basic financial statements. The School's basic financial statements comprise three components: (1) government-wide financial statements; (2) fund financial statements; and (3) notes to the financial statements. This report also contains required supplementary information, supplementary information, and other information in addition to the basic financial statements themselves.

Government-wide Financial Statements

The *Government-wide Financial Statements* are designed to provide readers with a broad overview of the School's finances, in a manner similar to a private-sector business.

The *Statement of Net Position* presents information on all of the School's assets, deferred outflows, liabilities, and deferred inflows, with the difference reported as *net position*. Over time, increases or decreases in net position may serve as a useful indicator of whether the financial position of the School is improving or deteriorating. The Statement of Net Position can be found on pages 10 and 11 of this report.

The *Statement of Activities* presents information showing how the School's net position changed during the most recent fiscal year. All changes in net position are reported as soon as the underlying event giving rise to the change occurs, regardless of the timing of related cash flows. Thus, revenues and expenses are reported in this statement for some items that will only result in cash flows in future fiscal periods (e.g., earned but unused vacation leave). The Statement of Activities can be found on page 12 of this report.

Fund Financial Statements
A fund is a grouping of related accounts that is used to maintain control over resources that have been segregated for specific activities or objectives. The School, like other state and local governments, uses fund accounting to ensure and demonstrate compliance with finance-related legal requirements. All of the funds of the School can be put into one category: governmental funds.

Governmental Funds
Governmental funds are used to account for essentially the same functions reported as governmental activities in the government-wide financial statements. However, unlike the government-wide financial statements, governmental fund financial statements focus on near-term inflows and outflows of spendable resources, as well as on balances of spendable resources available at the end of the fiscal year. Such information may be useful in evaluating the School's near-term financing requirements. These reconciliations can be found on pages 14 and 16 of this report.

Because the focus of governmental funds is narrower than that of the government-wide financial statements, it is useful to compare the information presented for governmental funds with similar information presented for governmental activities in the government-wide financial statements. By doing so, readers may better understand the long-term impact of the School's near-term financing decisions. Both the Balance Sheet and Statement of Revenues, Expenditures and Changes in Fund Balances provide a reconciliation to facilitate this comparison between the governmental funds and governmental activities.

The *Balance Sheet* for governmental funds, shown on page 13, presents financial information by fund type showing money left at year-end available for spending.

The *Statement of Revenues, Expenditures, and Changes in Fund Balances* for all governmental fund types, shown on page 15, focuses on how money flows in and out of the various funds.

Notes to the Financial Statements
The notes provide additional information that is essential to a full understanding of the data provided in the financial statements. The notes to the financial statements can be found on pages 17 through 44 of this report.

FINANCIAL ANALYSIS

Net Position
Net position may serve over time as a useful indicator of a government's financial position. In the case of the School, assets and deferred outflows of resources exceeded liabilities and deferred inflows of resources by $1,659,613 at the close of this fiscal year.

A large portion of the School's net position (90.20%) reflects its investment in capital assets (e.g., land, buildings, machinery and equipment), less any debt used to acquire those assets that is still outstanding. The School uses these capital assets to provide services to its students; consequently, these assets are not available for future spending. Although the School's investment in its capital assets is reported net of related debt, it should be noted that the resources needed to repay this debt must be provided from other sources, since the capital assets themselves cannot be used to liquidate these liabilities.

Approximately 11.53%, or $191,339 of the School's net position represents resources that are subject to external restrictions on how they may be used.

Since the remaining unrestricted net position balance is $(28,729), none of the School's net position may be used to meet ongoing obligations.

At June 30, 2025, the School is able to report positive balances in two of its categories of net position. Unrestricted net position is $(28,729) at year-end.

The table below provides a summary of the School's net position for its governmental activities as of June 30, 2025 and 2024:

	2025	2024	$ Change
Capital assets	$ 4,640,439	$ 1,630,111	$ 3,010,328
Other assets	835,085	460,012	375,073
Total assets	$ 5,475,524	$ 2,090,123	$ 3,385,401
Deferred outflows of resources	$ 107,726	$ 72,231	$ 35,495
Long-term liabilities	$ 462,861	$ 420,395	$ 42,466
Other liabilities	3,351,673	440,883	2,910,790
Total liabilities	$ 3,814,534	$ 861,278	$ 2,953,256
Deferred inflows of resources	$ 109,103	$ 52,407	$ 56,696
Net investment in capital assets	$ 1,497,003	$ 994,946	$ 502,057
Restricted	191,339	17,589	173,750
Unrestricted	(28,729)	236,134	(264,863)
Total net position	$ 1,659,613	$ 1,248,669	$ 410,944

Statement of Activities

The School's total revenues for the fiscal year ended June 30, 2025 increased by $1,430,608 over June 30, 2024 revenues. The increase was primarily due to the increase in state funding of $1,261,064 due to the School adding more students to their enrollment.

The School's total expenses increased by $1,442,186 over June 30, 2024 expenses. The increase was primarily due to the increase in student instruction and services of $1,438,909 due to the School's addition of students. Salary related items accounted for $1,500,535 of this increase in expenses.

A summary of the School's governmental activities related to operations for the years ended June 30, 2025 and 2024 is as follows:

	2025	2024	$ Change
Revenues:			
Program revenues:			
Operating grants and contributions	$ 800,342	$ 726,072	$ 74,270
Revenues - internal school funds	25,335	10,209	15,126
Total program revenues	825,677	736,281	89,396
General revenues:			
State funding	3,196,837	1,935,773	1,261,064
Other revenues	120,957	40,809	80,148
Total general revenues	3,317,794	1,976,582	1,341,212
Total revenues	4,143,471	2,712,863	1,430,608
Program expenses:			
Student instruction and services	3,559,226	2,120,317	1,438,909
General and administrative	173,301	170,024	3,277
Total expenses	3,732,527	2,290,341	1,442,186
Change in net position	410,944	422,522	(11,578)
Net position - beginning	1,248,669	826,147	422,522
Net position - end	$ 1,659,613	$ 1,248,669	$ 410,944

CAPITAL ASSETS AND DEBT ADMINISTRATION

Capital Assets
The School's investment in capital assets for its governmental activities as of June 30, 2025, amounts to $4,640,439 (net of accumulated depreciation).

During the 2024-2025 school year, the School acquired $3,181,201 in additions to capital assets. The most significant of those additions are as follows:

Building construction	$ 2,995,832
Land on Springfield Road	$ 68,273
Building costs	$ 41,334
Electric and conduit	$ 37,258
Hytera portable radios	$ 15,480

The table below provides a summary of the School's capital assets, net of depreciation, as of June 30, 2025 and 2024.

	2025	2024
Land	$ 507,633	$ 439,360
Construction in progress	3,516,106	428,953
Furniture and equipment	144,167	137,314
Leasehold improvements	1,531	6,267
Technology equipment	47,173	53,112
Right to use leased asset	423,829	565,105
Total	$ 4,640,439	$ 1,630,111

Additional information on the School's capital assets can be found in Note 5 on pages 23 and 24 of this report.

Long-Term Debt
At the end of the current fiscal year, the School had total long-term debt outstanding of $3,374,572. Of that amount, $2,911,711 is due in the next fiscal year.

	2025	2024
Lines of credit	$ 2,723,223	$ 83,594
Compensated absences	231,136	-
Right to use lease liability	420,213	551,571
Total long-term debt	3,374,572	635,165
Less: current portion	(2,911,711)	(214,951)
Long-term portion of debt	$ 462,861	$ 420,214

Additional information on outstanding debt can be found in Note 6 on pages 24 and 25 and Note 7 on page 25.

CURRENTLY KNOWN CONDITIONS EFFECTING FUTURE YEARS

The School's primary source of funding is based on student enrollment. Each enrolled student generates state and district funding that supports the educational services provided. With a current waiting list exceeding 500 students, the School is well-positioned for continued financial growth, contingent upon maintaining strong academic outcomes and fulfillment of its educational commitments.

During the fiscal year covered by this audit, the School participated for the first time in the Tennessee Comprehensive Assessment Program (TCAP) and achieved results in the top 18% statewide for third-grade literacy. This performance demonstrates the School's effectiveness in meeting the educational needs of families in Hamilton County, Tennessee; and places us in a position of financial stability and sustainability.

Several external factors may influence the School's future operations and financial stability. These include changes in state legislation, shifts in public perception of charter schools, and economic conditions affecting interest rates and borrowing costs. Additionally, the continued use of portable classroom facilities may impact long-term enrollment and community satisfaction. To address this, the School intends to pursue a low-interest loan, such as a USDA Office of Rural Development (ORD) loan, to fund future building projects. Inability to secure such financing, due to circumstances beyond the School's control, could constrain growth and affect stakeholder confidence.

REQUESTS FOR INFORMATION

This financial report is designed to provide a general overview of Ivy Academy's Skillern Elementary School's finances for all those with an interest in the School's finances. Questions concerning any of the information provided in this report or requests for additional financial information may be addressed to Ivy Academy's Skillern Elementary School, P.O. Box 39, Soddy-Daisy, TN 37384.

BASIC FINANCIAL STATEMENTS

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Statement of Net Position
June 30, 2025

	Governmental Activities
ASSETS	
Current assets	
Cash	$ 420,506
Accounts receivable	94,095
Grants receivable	25,445
Security deposits	165
Total current assets	540,211
Non-current assets	
Restricted assets	
Cash - restricted for construction	146,730
Stabilization reserve trust	30,299
Net pension asset	117,845
Total restricted assets	294,874
Capital assets	
Land and construction in progress	4,023,739
Other capital assets - net	
Capital assets being depreciated - net of accumulated depreciation	192,871
Right to use leased asset - net of accumulated amortization	423,829
Total other capital assets - net	616,700
Total capital assets	4,640,439
Total non-current assets	4,935,313
TOTAL ASSETS	$ 5,475,524
DEFERRED OUTFLOWS OF RESOURCES	
Deferred outflows related to pensions	$ 107,726

The accompanying notes are an integral part of the financial statements.

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Statement of Net Position (Continued)
June 30, 2025

	Governmental Activities
LIABILITIES	
Current liabilities	
Accounts payable	$ 12,178
Accrued liabilities	416,739
Payable to pension	11,045
Line of credit	2,723,223
Compensated absences - due in one year	46,227
Right to use lease liability - due in one year	142,261
Total current liabilities	3,351,673
Non-current liabilities	
Compensated absences	184,909
Right to use lease liability	277,952
Total non-current liabilities	462,861
TOTAL LIABILITIES	$ 3,814,534
DEFERRED INFLOWS OF RESOURCES	
Deferred inflows related to pensions	$ 109,103
NET POSITION	
Net investment in capital assets	$ 1,497,003
Restricted for internal school funds	1,523
Restricted for construction	146,730
Restricted for stabilization reserve trust	30,299
Restricted for pension	12,787
Unrestricted	(28,729)
TOTAL NET POSITION	$ 1,659,613

The accompanying notes are an integral part of the financial statements.

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Statement of Activities
Year Ended June 30, 2025

School Activities	Total	Functions: Student Instruction and Services	Functions: General and Administrative
Program expenses			
Salaries, payroll taxes, and benefits	$ 2,864,708	$ 2,864,708	$ -
Instruction	254,273	254,273	-
Administration	135,167	52,555	82,612
Occupancy	339,672	339,672	-
Expenditures - internal school funds	26,557	26,557	-
Interest	61,313	-	61,313
Other charges	50,837	21,461	29,376
Total program expenses	3,732,527	3,559,226	173,301
Program revenues			
Operating grants and contributions	800,342	800,342	-
Revenues - internal school funds	25,335	25,335	-
Total program revenues	825,677	825,677	-
Net program expenses	(2,906,850)	$ (2,733,549)	$ (173,301)
General revenues			
State funding	3,196,837		
Other revenues	120,957		
Total general revenues	3,317,794		
Change in net position	410,944		
Net position - beginning	1,248,669		
Net position - end	$ 1,659,613		

The accompanying notes are an integral part of the financial statements.

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Governmental Fund
Balance Sheet
June 30, 2025

	General Fund
ASSETS	
Cash	$ 567,236
Accounts receivable	94,095
Grants receivable	25,445
Security deposits	165
Stabilization reserve trust	30,299
TOTAL ASSETS	$ 717,240
LIABILITIES	
Accounts payable	$ 12,178
Accrued liabilities	416,739
Payable to pension	11,045
TOTAL LIABILITIES	$ 439,962
FUND BALANCES	
Restricted	$ 178,552
Unassigned	98,726
TOTAL FUND BALANCES	$ 277,278

The accompanying notes are an integral part of the financial statements.

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Reconciliation of the Governmental Funds Balance Sheet
to the Statement of Net Position
June 30, 2025

Total fund balance per governmental fund balance sheet	$ 277,278
Capital assets used in governmental activities are not financial resources and, therefore, are not reported in the funds.	4,216,610
Right to use leased assets used in governmental activities are not financial resources and, therefore, are not reported in the funds.	423,829
Long-term liabilities are not due and payable in the current period and, therefore, are not reported in the funds.	(3,374,572)
Pension liabilities, including deferred inflows and deferred outflows, are not due and payable in the current period and, therefore, are not reported in the funds.	116,468
Net position of governmental activities	$ 1,659,613

The accompanying notes are an integral part of the financial statements.

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Governmental Fund
Statement of Revenues, Expenditures and Changes in Fund Balances
Year Ended June 30, 2025

	General Fund
REVENUES	
State - TISA funding	$ 3,196,837
Federal and state awards	551,473
Other awards and contributions	248,869
Stabilization interest income	2,186
Revenues - internal school funds	25,335
Other revenues	118,771
TOTAL REVENUES	4,143,471
EXPENDITURES	
Current expenditures	
Salaries, payroll taxes, and benefits	2,693,118
Instruction	254,273
Administration	135,167
Occupancy	105,150
Expenditures - internal school funds	26,557
Other charges	50,837
Total current expenditures	3,265,102
Capital outlay	3,244,849
Debt service	
Principal	166,582
Interest	61,313
Total debt service	227,895
TOTAL EXPENDITURES	6,737,846
Excess (deficiency) of revenues over (under) expenditures	(2,594,375)
OTHER FINANCING SOURCES (USES)	
Loan proceeds	2,674,853
Net change in fund balance	80,478
FUND BALANCE - beginning	196,800
FUND BALANCE - end	$ 277,278

The accompanying notes are an integral part of the financial statements.

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Reconciliation of the Statement of Revenues, Expenditures and Changes in Fund Balances of Governmental Funds to the Statement of Activities
June 30, 2025

Net change in fund balance for total governmental funds	$ 80,478
Governmental funds report capital outlays as expenditures. However, in the Statement of Activities, the cost of those assets is allocated over their estimated useful lives and reported as depreciation expense. This is the amount by which capital outlay exceeded depreciation in the current period.	3,151,604
Governmental funds report right to use leased assets as capital outlay expenditures. However, in the Statement of Activities, the cost of those assets is allocated and reported as amortization expense. This is the amount by which amortization expense exceeded the right to use leased asset in the current period.	(141,276)
Repayment of long-term debt is reported as an expenditure in governmental funds, but the payment reduces long-term liabilities in the Statement of Net Position	166,582
New debts issued are reported as a financial resource in the governmental funds. However, this is reported as an increase in long-term liabilities in the Statement of Net Position. During the current year, additional proceeds were drawn.	(2,674,853)
Pension expense for the prior year is not reported in the governmental funds but is reported in the Statement of Activities. Current year pension contributions are reported as an expense in the governmental funds but are not reported in the Statement of Activities.	59,545
Compensated absences reported in the Statement of Activities do not require the use of current financial resources and, therefore, are not reported as expenditures in the governmental funds.	(231,136)
Change in net position of governmental activities	$ 410,944

The accompanying notes are an integral part of the financial statements.

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

The financial statements of Ivy Academy's Skillern Elementary School have been prepared in conformity with Generally Accepted Accounting Principles (GAAP) as applied to governmental units. The Governmental Accounting Standards Board (GASB) is the accepted standard-setting body for establishing governmental accounting and financial reporting principles.

The following is a summary of the more significant accounting policies:

A. Reporting Entity

Ivy Academy's Skillern Elementary School (the School) is a non-profit entity which operates under provisions of the laws of Tennessee. The School is governed by an executive director and board members who jointly oversee the general administrative responsibilities. The mission of the School is to cultivate the body, mind, and heart of each student through a classical, content-rich education that nurtures moral and civic virtue in an immersive, outdoor environment.

The School's funding comes primarily from monthly payments from the Hamilton County Board of Education from funds received from the Tennessee Department of Education. This State assistance is computed based on the Tennessee Investment in Student Achievement (TISA) formula, adopted by the General Assembly in 2022, and implemented for the 2023-24 school year.

The School is considered to be a special purpose governmental entity and is not a component unit of another governmental entity.

B. Basic Financial Statements

The basic financial statements include both government-wide (based on the School as a whole) and fund financial statements. Both the government-wide and fund financial statements categorize activities as either governmental activities or business-type activities. The School has no business-type activities.

Government-wide Statements - The School's government-wide financial statements include a Statement of Net Position and a Statement of Activities. These statements present summaries of Governmental Activities for the School applicable to governmental units which are generally accepted in the United States of America.

The Statement of Net Position and the Statement of Activities display information about the primary government. These statements include the financial activities of the overall government. The Statement of Activities presents a comparison between direct expenses and program revenues for each function of the School's governmental activities. Direct expenses are those that are specifically associated with a program or function and, therefore, are clearly identifiable to a particular function. Certain indirect costs are included in program expenses reported for individual functions. Program revenues include grants and contributions that are restricted to meeting the operational requirements of a particular program. The net cost (by function) is normally covered by general revenue (unrestricted grants and contributions, interest income, etc.).

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

B. Basic Financial Statements (Continued)

Government-wide Statements (Continued)
This government-wide focus is designed to view Ivy Academy's Skillern Elementary School as a complete entity and the change in aggregate financial position resulting from the activities of the fiscal period. Fiduciary funds are not included in the government-wide financial statements.

Fund Financial Statements - The fund financial statements provide information about the School's funds. Separate statements for each fund category are presented. The emphasis of fund financial statements is on the major governmental fund, displayed in a separate column. All remaining governmental funds are aggregated and reported as non-major funds. The School does not have non-major funds.

The School reports the following major governmental fund:

General Fund - This is the School's primary operating fund. It accounts for all financial resources of the School, except those required to be accounted for in another fund.

C. Measurement Focus - Basis of Accounting

The government-wide financial statements are presented in an economic resources measurement focus and the accrual basis of accounting. Accordingly, all of the School's assets, deferred outflows, liabilities, and deferred inflows, including capital assets, are included in the accompanying Statement of Net Position. The Statement of Activities presents changes in net position. Under the accrual basis of accounting, revenues are recognized in the period in which they are earned while expenses are recognized in the period in which the liability is incurred. The types of transactions reported as program revenues are reported in the following categories: 1) charges for services; 2) operating grants and contributions; and 3) capital grants and contributions.

Government Fund Financial Statements
Government fund financial statements include a Balance Sheet and a Statement of Revenues, Expenditures and Changes in Fund Balances for the governmental fund. The School has presented all funds that qualify to be presented.

All governmental funds are accounted for on a spending or current financial resources measurement focus and the modified accrual basis of accounting. Accordingly, only current assets and current liabilities are included on the Balance Sheet. The Statement of Revenues, Expenditures and Changes in Fund Balance presents increases (revenues and other financing sources) and decreases (expenditures and other financing uses) in net current assets. Under the modified accrual basis of accounting, revenues are recognized in the accounting period in which they become both measurable and available to financial expenditures of the current period. Accordingly, revenues are considered to be available when they are collectible within the current period or soon enough thereafter to pay liabilities of the current period. For this purpose, the School considers revenues to be available if they are collected within sixty days of the end of the current fiscal period. Expenditures generally are recorded when a liability is incurred, as under accrual accounting. However, debt service expenditures as well as expenditures related to compensated absences claims and judgments are recorded when payment is due.

Since the governmental fund statements are presented on a different measurement focus and basis of accounting than the governmental activities column in the government-wide financial statements, a reconciliation is presented on the page following each statement which briefly explains the adjustments necessary to transform the fund-based financial statements into the governmental activities column of the government-wide presentation.

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

D. Budgets and Budgetary Accounting

Budgets are adopted on a basis consistent with generally accepted accounting principles but are not required to be included in this presentation. All annual appropriations lapse at fiscal year-end. Budgeted amounts are as originally adopted, or as amended by the Board prior to June 30, 2025.

E. Cash and Cash Equivalents

For financial statement purposes, the School considers all highly liquid debt instruments purchased with a maturity of three months or less to be cash equivalents.

F. Investments

All investments are reported at fair value, which is based on quoted market prices.

The School is authorized by State Statutes to invest in the following:

Bonds, notes, or treasury bills of the United States.
Nonconvertible debt securities of the Federal Home Loan Bank, the Federal National Mortgage Association, the Federal Farm Credit Bank, and the Student Loan Marketing Association.
Any obligation guaranteed by the United States or any of its agencies.
Certificates-of-deposit at state and federal chartered banks and savings and loan associations.
The Local Government Investment Pool created by Title 9.

G. Interfund Transactions

Interfund Receivables and Payables

Short-term advances between funds are not eliminated but accounted for in the appropriate interfund receivable and payable accounts classified as due to other funds and due from other funds in the fund financial statements, and are subject to elimination upon consolidation.

Transactions between Funds

Transactions between funds that would be treated as revenues, expenditures, or expenses if they involved organizations external to the governmental unit are accounted for as revenues, expenditures, or expenses in the funds involved. Transactions which constitute reimbursements of a fund for expenditures or expenses initially made from that fund which are properly applicable to another fund are recorded as expenditures or expenses in the reimbursing fund and as reductions of the expenditures or expense in the fund that is reimbursed. All other legally authorized transfers are not eliminated but treated as operating transfers and are included as other financing sources or uses in the governmental funds.

H. Prepayment of Expenditures

Governmental fund expenditures for insurance and similar services extending over more than one accounting period are allocated between accounting periods and reported as an expense of the period in which they relate. At year-end, there were no prepaid expenditures.

I. Inventories

Supplies and materials are recorded as expenditures/expenses at the time items are purchased and are not inventoried at year-end due to lack of materiality.

J. Restricted Assets

Certain resources can be classified as restricted assets on the Statement of Net Position because their use is limited.

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

K. Subscription IT Arrangements

The School follows GASB No. 96, *Subscription-Based Information Technology Arrangements*, (SBITA), to address the accounting treatment and financial reporting for these agreements. The SBITA asset is measured as the initial value of the subscription liability plus payments made to the vendor at the commencement of the subscription term, plus capitalizable initial implementation costs, and less any vendor incentives received at the commencement of the subscription term. The Entity will amortize the SBITA asset in a systematic and rational manner over the shorter of the subscription term or the useful life of the underlying asset. Currently, the School does not have any subscription IT arrangements.

L. Leases

The School follows GASB No. 87, *Leases,* to address the accounting treatment and financial reporting of leases. Leases that are not classified as short-term leases or contracts that transfer ownership are required to recognize a right to use asset and a related lease liability. Right to use leased assets are initially measured at an amount equal to the initial measurement of the related lease liability plus any lease payments made prior to the lease term, less lease incentives, and plus ancillary charges necessary to place the lease into service. Right to use leased assets are amortized on a straight-line basis over the life of the related lease.

M. Capital Assets

Capital assets are reported in the government-wide financial statements. Capital assets are defined as assets with an initial, individual cost of more than $1,000 and an estimated useful life in excess of two years. Such assets are recorded at historical cost or estimated historical cost if purchased or constructed. Donated capital assets are recorded at estimated fair value at the date of donation. The cost of normal maintenance and repairs that do not add to the value of the asset or materially extended assets' lives are not capitalized.

Capital assets are depreciated using the straight-line method over the following estimated useful lives:

Asset Class	Years
Furniture and equipment	5-10
Leasehold improvements	3
Technology equipment	10

N. Deferred Outflows/Inflows of Resources

In addition to assets, the Statement of Net Position will sometimes report a separate section for deferred outflows of resources. This separate financial statement element, *deferred outflows of resources*, represents a consumption of net position that applies to a future period(s) and so will *not* be recognized as an outflow of resources (expense/expenditure) until then. Currently, the School has only one type of item that qualifies for reporting in this category: deferred outflows related to pensions.

In addition to liabilities, the Statement of Net Position will sometimes report a separate section for deferred inflows of resources. This separate financial statement element, *deferred inflows of resources*, represents an acquisition of net position that applies to a future period(s) and so will *not* be recognized as an inflow of resources (revenue) until that time. Currently, the School has only one type of item that qualifies for reporting in this category: deferred inflows related to pensions.

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

O. Compensated Absences

Faculty receive ten sick days and three personal days per year. Twelve-month employees receive 12 sick days per year. Personal days do roll over into the employee's sick leave bank if not used each year. Any of the ten sick days per year which are not used within a given school year, roll over to the next year and can be accumulated with a 40-day limit to be used toward sick days. The days over 40 can be banked and used toward early retirement but cannot be used for paid days off nor will they be paid out in compensatory cash. The estimated liability for leave is recorded in the financial statements.

P. Long-term Obligations

In the government-wide financial statements, long-term debt and other long-term obligations are reported as liabilities in the Statement of Net Position.

Q. Pensions

For purposes of measuring the net pension liability, deferred outflows of resources and deferred inflows of resources related to pensions, and pension expense, information about the fiduciary net position of the Teacher Legacy Pension Plan, Teacher Retirement Plan, the School's portion of Hamilton County's Legacy Plan, and the School's portion of Hamilton County's Retirement Plan (with Cost Controls) of the Tennessee Consolidated Retirement System (TCRS) and additions to/deductions from the plan's fiduciary net position have been determined on the same basis as they are reported by the TCRS. For this purpose, benefits (including refunds of employee contributions) are recognized when due and payable in accordance with the benefit terms of the TCRS plans. Investments are reported at fair value.

R. Net Position

Net position is the residual of all elements presented in the Statement of Net Position (i.e., assets + deferred outflows - liabilities - deferred inflows). Net investment in capital assets represent capital assets reduced by accumulated depreciation and by any outstanding debt related to the acquisition, construction, or improvement of those assets. Restricted net position represents restricted assets reduced by any related outstanding debt.

S. Fund Balance

Governmental Accounting Standards Board Statement No. 54, *Fund Balance Reporting and Governmental Fund Type Definitions* established standards for fund balance classifications for state and local governments and requires that resources be classified for accounting reporting purposes into the following fund balances:

Nonspendable: The School cannot spend these amounts due to form.

Restricted: The State or other sources can restrict funds to specific purposes by externally imposing restrictions or imposing by law through constitutional provisions or enabling legislation.

Committed: The Board of Directors has the authority to commit funds for a specific purpose. Any funds set aside as committed fund balance requires, at a minimum, the passage of a resolution by a simple majority vote.

Assigned: The Board of Directors has the authority to set aside funds for the intended use of a specific purpose. Any funds set aside as assigned fund balance requires a simple majority vote and must be recorded in the minutes.

Unassigned: Amounts not classified as nonspendable, restricted, committed, or assigned.

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Continued)

S. Fund Balance (Continued)

When both restricted and unrestricted funds are available for expenditure, restricted funds should be spent first unless legal requirements disallow it.

When restricted, committed, assigned and unassigned funds are available for use, restricted funds should be spent first, committed funds second, assigned funds third and unassigned funds last.

T. Estimates

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

U. Income Tax Status

The School is a not-for-profit corporation as described in Section 501(c)(3) of the Internal Revenue Code and is exempt from Federal income taxes on related income pursuant to Section 501 of the Code.

V. Uncertain Tax Position

The School accounts for the effect of any uncertain tax position based on a more likely than not threshold of the recognition of the tax position being sustained based on the merits of the position under examination by the applicable taxing authority. If a tax position is deemed to be uncertain, the unrecognized tax benefit is estimated based on a probability assessment. Tax positions include, but are not limited to, the tax-exempt status and determination of whether income is subject to unrelated business income tax. There were no uncertain tax positions requiring recognition in the financial statements at year-end.

W. Events Occurring after Reporting Date

The School has evaluated events and transactions that occurred between June 30, 2025, and November 10, 2025, which is the date that the financial statements were available to be issued, for possible recognition or disclosure in the financial statements.

NOTE 2 - DEPOSITS AND INVESTMENTS

Deposits

Custodial credit risk is the risk that in the event of a bank failure the School's deposits may not be returned to it. The School does not have a deposit or investment policy for custodial credit risk; however, the State of Tennessee requires its governmental entities to either meet the deposit and collateralization regulations under TCA Title 9, Chapter 4, Parts 1 and 4, or as provided in the collateral pool. As of June 30, 2025, the carrying amount of the School's deposits was $567,136 and the bank balance was $620,648. None of the bank balance was exposed to custodial credit risk as uninsured or uncollateralized due to the fact that its deposits and investments are in a financial institution that is a participant in the State of Tennessee collateral pool.

The carrying amount of the School's deposits is classified as follows on the Statement of Net Position:

Cash	$ 420,506
Cash - restricted for construction	146,730
Less: petty cash	(100)
Total	$ 567,136

The School had no investments at year-end.

NOTE 3 - ACCOUNTS RECEIVABLE

Accounts receivable at year-end, consisted of the following:

Hamilton County Department of Education	$ 88,970
Ivy Academy, Inc.	4,714
Other	411
Total	$ 94,095

Due to the nature of the receivables, no allowance for doubtful accounts was deemed necessary.

NOTE 4 - GRANTS RECEIVABLE

Grants receivable at year-end, consisted of the following:

U.S. Department of Education	$ 22,728
U.S Department of Agriculture	2,717
Total	$ 25,445

NOTE 5 - CAPITAL ASSETS

Capital asset activity for the year ended June 30, 2025, was as follows for the governmental activities:

	Beginning Balance	Increases	Decreases	Ending Balance
Capital assets not being depreciated:				
Land	$ 439,360	$ 68,273	$ -	$ 507,633
Construction in progress	428,953	3,087,153	-	3,516,106
Total capital assets not being depreciated	868,313	3,155,426	-	4,023,739
Capital assets being depreciated:				
Furniture and equipment	154,305	25,775	-	180,080
Leasehold improvements	14,710	-	-	14,710
Technology equipment	59,387	-	-	59,387
Total capital assets being depreciated	228,402	25,775	-	254,177
Less accumulated depreciation for:				
Furniture and equipment	16,991	18,922	-	35,913
Leasehold improvements	8,443	4,736	-	13,179
Technology equipment	6,275	5,939	-	12,214
Total accumulated depreciation	31,709	29,597	-	61,306
Total capital assets being depreciated - net	196,693	(3,822)	-	192,871
Governmental activities capital assets - net, excluding right to use leased asset	$ 1,065,006	$3,151,604	$ -	4,216,610
Right to use leased asset, net				423,829
Total capital assets, net as reported in the Statement of Net Position				$ 4,640,439

NOTE 5 - CAPITAL ASSETS (Continued)

Depreciation and amortization expenses were charged to the functions/activities of the School as follows:

Student instruction and services/Occupancy	$ 170,873

The School has recorded a right to use leased asset for leased modular buildings. These leased modular buildings have an original book value of $706,381 and accumulated amortization of $282,552. The related lease is discussed in footnote 7. The right to use leased asset is amortized on a straight-line basis over the term of the lease.

NOTE 6 - LONG-TERM DEBT

Long-term debt, payable by the governmental fund, which consists of lines of credit and compensated absences, is summarized as follows:

	Principal Balance
Line of credit with First Horizon Bank, secured by assets, maximum credit line $50,000, 8.50% interest, due upon demand, other debt	$ 28,268
Line of credit with Citizens Tri-County Bank, secured by assets, maximum credit line $50,350, 9.00% interest, due upon demand, other debt	20,102
Line of credit with First Horizon Bank, secured by assets, maximum credit line $500,000, 6.857% interest, due upon demand, other debt	500,000
Line of credit with First Horizon Bank, secured by assets, maximum credit line $3,851,250, 6.737% interest, due upon demand, other debt	2,174,853
Compensated absences, other debt	231,136
	2,954,359
Less: current portion of long-term debt	(2,769,450)
Total long-term debt	$ 184,909

A summary of changes in long-term debt for the year ended June 30, 2025, is as follows:

	Balance July 1, 2024	Additions	Retirements	Balance June 30, 2025	Amount Due Within One Year
Other debt:					
First Horizon Bank LOC	$ 39,499	$ -	$ (11,231)	$ 28,268	$ 28,268
Citizens Tri-County LOC	44,095	-	(23,993)	20,102	20,102
First Horizon Bank LOC	-	500,000	-	500,000	500,000
First Horizon Bank LOC	-	2,174,853	-	2,174,853	2,174,853
Compensated absences	-	231,136	-	231,136	46,227
Total	$ 83,594	$ 2,905,989	$ (35,224)	2,954,359	$ 2,769,450
Less: current portion of long-term debt				(2,769,450)	
Total long-term debt				$ 184,909	

NOTE 6 - LONG-TERM DEBT (Continued)

The change in liability for compensated absences is shown as the net change, rather than gross increases and decreases.

Interest paid during the year ended June 30, 2025, on long-term debt was $21,934.

All debt is payable from the current general revenues of the School. The School's full faith and credit are irrevocably pledged as collateral, along with various assets. If in default and there are insufficient funds from the current general revenues, the principal and interest will be paid from the prior year funds of the School.

NOTE 7 - LEASE LIABILITY

The School has entered into an agreement to lease modular buildings. The lease agreement qualifies as an other than short-term lease under GASB 87 and, therefore, has been recorded at the present value of the future minimum lease payments as of the date of inception. The agreement was executed on April 1, 2023, and requires 60 monthly payments of $14,228. There are no variable components of the lease. The lease liability is measured at a discount rate of 8%. As a result of the lease, the School has recorded a right to use leased asset with a net book value of $423,829 at June 30, 2025. The right to use leased asset is discussed in footnote 5. Interest paid during the year on this lease was $39,379. Future minimum lease obligations and the net present value of these minimum lease payments as of June 30, 2025, are as follows:

Year Ended June 30,	Minimum Payments		
	Principal	Interest	Total
2026	$ 142,261	$ 28,475	$ 170,736
2027	154,067	16,669	170,736
2028	123,885	4,167	128,052
Total	$ 420,213	$ 49,311	$ 469,524

A summary of changes in the lease liability for the year ended June 30, 2025, is as follows:

	Balance July 1, 2024	Additions	Retirements	Balance June 30, 2025	Amount Due Within One Year
Modular buildings lease	$ 551,571	$ -	$ (131,358)	$ 420,213	$ 142,261

NOTE 8 - NET POSITION RESTRICTIONS

The School can restrict net position to be maintained for specific purposes. The nature and purpose of these are explained as follows:

Restricted for internal school funds - Net position in the amount of $1,523 is legally restricted for the internal school fund activity in accordance with TCA Section 49-2-110.

Restricted for construction - $146,730 is restricted in a savings account for construction expenditures.

Restricted for stabilization reserve trust - Net position in the amount of $30,299 is legally restricted for the stabilization reserve trust.

Restricted for pension - Net position in the amount of $12,787 is legally restricted for pension expenditures.

NOTE 9 - FUND BALANCES

Fund balances are classified as follows:

Restricted: $1,523 is legally restricted for the internal school fund activity in accordance with TCA Section 49-2-110. $146,730 is restricted for future construction expenditures. $30,299 is legally restricted for the stabilization reserve trust.

Unassigned: In accordance with generally accepted accounting principles, the General Fund is the only fund at the School that reports amounts for unassigned fund balance. This classification represents fund balance that is not nonspendable and has not been committed to specific purposes within the General Fund.

NOTE 10 - RECONCILIATION OF GOVERNMENT-WIDE AND FUND FINANCIAL STATEMENTS

Explanation of certain differences between the governmental fund Balance Sheet and the government-wide Statement of Net Position:

The governmental fund balance sheet includes a reconciliation between fund balance - total governmental funds, and net position - governmental activities as reported in the government-wide Statement of Net Position. One element of that reconciliation explains that, "Long-term liabilities are not due and payable in the current period and, therefore, are not reported in the funds." The details of this $(3,374,572) difference is as follows:

Lines of credit	$(2,723,223)
Compensated absences	(231,136)
Lease liability	(420,213)
Net adjustment	$(3,374,572)

Another element of that reconciliation states that, "Pension liabilities, including deferred inflows and deferred outflows, are not due and payable in the current period and, therefore, are not reported in the funds." The details of this $116,468 difference are as follows:

Net pension asset	$ 117,845
Deferred outflows related to pensions	107,726
Deferred inflows related to pensions	(109,103)
Net adjustment	$ 116,468

Explanation of certain differences between the governmental fund Statement of Revenues, Expenditures and Changes in Fund Balances and the government-wide Statement of Activities:

The governmental fund Statement of Revenues, Expenditures and Changes in Fund Balances includes a reconciliation between net changes in fund balances for total governmental funds and changes in net position of governmental activities as reported in the government-wide Statement of Activities. One element of that reconciliation explains that "Governmental funds report capital outlays as expenditures. However, in the Statement of Activities, the cost of those assets is allocated over their estimated useful lives and reported as depreciation expense." The details of this $3,151,604 difference are as follows:

Capital outlay	$ 3,181,201
Depreciation expense	(29,597)
Net adjustment	$ 3,151,604

NOTE 10 - RECONCILIATION OF GOVERNMENT-WIDE AND FUND FINANCIAL STATEMENTS (Continued)

Another element of that reconciliation states that, "Repayment of long-term debt is reported as an expenditure in governmental funds, but the payment reduces long-term liabilities in the Statement of Net Position." The details of this $166,582 difference are as follows:

Lines of credit	$ 35,224
Lease liability	131,358
Net adjustment	$ 166,582

Another element of that reconciliation states that, "Pension expense for the prior year is not reported in the governmental funds but is reported in the Statement of Activities. Current year pension contributions are reported as an expense in the governmental funds but are not reported in the Statement of Activities." The details of this $59,545 difference are as follows:

Pension expense	$ (4,390)
Contributions	65,937
Changes in proportionate share	(2,002)
Net adjustment	$ 59,545

NOTE 11 - ADVERTISING

Advertising costs are expensed as incurred. Advertising costs for the year ended June 30, 2025 amounted to $9,931.

NOTE 12 - CONCENTRATIONS

The School receives the majority of its funding from pass-through allocations paid to the Hamilton County Board of Education by the Tennessee Department of Education. The Entity believes that it is highly unlikely that funding would be discontinued because of the nature of the services provided.

NOTE 13 - RISK MANAGEMENT

It is the policy of the School to purchase commercial insurance for various risks of losses to which it is exposed. Settled claims have not exceeded this commercial insurance coverage in any of the past three fiscal years.

NOTE 14 - TEACHER LEGACY PENSION PLAN

General Information about the Pension Plan

Plan Description

The Tennessee Consolidated Retirement System (TCRS) was created by state statute under Tennessee Code Annotated Title 8, Chapters 34-37. The TCRS Board of Trustees is responsible for the proper operation and administration of all employer pension plans of the TCRS. The Tennessee Treasury Department, an agency in the legislative branch of state government, administers the plans of the TCRS. The TCRS issues a publicly available financial report that can be obtained at https://treasury.tn.gov/Retirement/Boards-and-Governance/Reporting-and-Investment-Policies.

NOTE 14 - TEACHER LEGACY PENSION PLAN (Continued)

General Information about the Pension Plan (Continued)

Teachers employed by the School with membership in the TCRS before July 1, 2014 are provided with pensions through the Teacher Legacy Pension Plan, a cost sharing multiple-employer pension plan administered by the TCRS. The Teacher Legacy Pension Plan closed to new membership on June 30, 2014 but will continue providing benefits to existing members and retirees.

The Teacher Retirement Plan became effective July 1, 2014 for teachers employed by Local Education Agencies (LEAs) after June 30, 2014. The Teacher Retirement Plan is a separate cost-sharing, multiple-employer defined benefit plan.

Benefits Provided

Tennessee Code Annotated Title 8, Chapters 34-37 establishes the benefit terms and can be amended only by the Tennessee General Assembly. Members of the Teacher Legacy Pension Plan are eligible to retire with an unreduced benefit at age 60 with 5 years of service credit, or after 30 years of service credit regardless of age. Benefits are determined by a formula using the member's highest five consecutive years average compensation and the member's service credit. A reduced early retirement benefit is available at age 55 if vested. Members are vested with five years of service credit. Service-related disability benefits are provided regardless of length of service. Five years of service is required for nonservice-related disability eligibility. The service-related and nonservice-related disability benefits are determined in the same manner as a service retirement benefit but are reduced by 10 percent and include projected service credits. A variety of death benefits are available under various eligibility criteria. Member and beneficiary annuitants are entitled to automatic cost of living adjustments (COLAs) after retirement. A COLA is granted each July for annuitants retired prior to the 2nd of July of the previous year. The COLA is based on the change in the consumer price index (CPI) during the prior calendar year, capped at 3 percent, and applied to the current benefit. No COLA is granted if the change in the CPI is less than one-half percent. A one percent COLA is granted if the CPI change is between one-half percent and one percent. A member who leaves employment may withdraw their employee contributions, plus any accumulated interest.

Contributions

Contributions for teachers are established in the statutes governing the TCRS and may only be changed by the Tennessee General Assembly. Teachers contribute 5 percent of salary. The LEAs make employer contributions at the rate set by the Board of Trustees as determined by an actuarial valuation. By law, employer contributions of the Teacher Legacy Pension Plan are required to be paid. The TCRS may intercept the state shared taxes of the sponsoring governmental entity of the LEA if the required employer contributions are not remitted. Employer contributions contractually required by the School for the year ended June 30, 2025 to the Teacher Legacy Pension Plan were $26,404, which is 6.24 percent of covered payroll. The employer rate, when combined with member contributions, is expected to finance the costs of benefits earned by members during the year, the cost of administration, as well as an amortized portion of any unfunded liability.

Pension Liabilities (Assets), Pension Expense (Negative Pension Expense), and Deferred Outflows of Resources and Deferred Inflows of Resources Related to Pensions

Pension Liabilities (Assets)

At June 30, 2025, the School reported a liability (asset) of $(98,293) for its proportionate share of the net pension liability (asset). The net pension liability (asset) was measured as of June 30, 2024, and the total pension liability used to calculate the net pension liability (asset) was determined by an actuarial valuation as of that date. The School's proportion of the net pension liability (asset) was based on the School's share of contributions to the pension plan relative to the contributions of all participating LEAs. At the measurement date of June 30, 2024, the School's proportion was 0.005705 percent. The proportion measured as of June 30, 2023 was 0.002785 percent.

NOTE 14 - TEACHER LEGACY PENSION PLAN (Continued)

Pension Liabilities (Assets), Pension Expense (Negative Pension Expense), and Deferred Outflows of Resources and Deferred Inflows of Resources Related to Pensions (Continued)

Pension Expense (Negative Pension Expense)
For the year ended June 30, 2025, the School recognized pension expense (negative pension expense) of $(12,147).

Deferred Outflows of Resources and Deferred Inflows of Resources
For the year ended June 30, 2025, the School reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

	Deferred Outflows of Resources	Deferred Inflows of Resources
Differences between expected and actual experience	$ 26,212	$ -
Changes in assumptions	-	-
Net difference between projected and actual earnings on pension plan investments	-	19,143
Changes in proportion of net pension liability (asset)	-	66,808
LEA's contributions subsequent to the measurement date of June 30, 2024	26,404	(not applicable)
Total	$ 52,616	$ 85,951

The School's employer contributions of $26,404 reported as pension related deferred outflows of resources subsequent to the measurement date, will be recognized as a reduction (increase) to the net pension liability (asset) in the year ended June 30, 2026. Other amounts reported as deferred outflows of resources and deferred inflows of resources related to pensions will be recognized in pension expense as follows:

Year Ended June 30:	
2026	$ (44,398)
2027	$ 4,725
2028	$ (9,988)
2029	$ (10,079)
2030	$ -
Thereafter	$ -

In the table above, positive amounts will increase pension expense, while negative amounts will decrease pension expense.

NOTE 14 - TEACHER LEGACY PENSION PLAN (Continued)

Pension Liabilities (Assets), Pension Expense (Negative Pension Expense), and Deferred Outflows of Resources and Deferred Inflows of Resources Related to Pensions (Continued)

Actuarial assumptions

The total pension liability in the June 30, 2024 actuarial valuation was determined using the following actuarial assumptions, applied to all periods included in the measurement:

Inflation	2.25 percent
Salary increases	Graded salary ranges from 8.72 to 3.44 percent based on age, including inflation, averaging 4.00 percent
Investment rate of return	6.75 percent, net pension plan investment expenses, including inflation
Cost-of living adjustment	2.125 percent

Mortality rates were based on actual experience including an adjustment for some anticipated improvement.

The actuarial assumptions used in the June 30, 2024 actuarial valuation are based on the results of an actuarial experience study performed for the period July 1, 2016 through June 30, 2020. As a result of the 2020 actuarial experience study, investment and demographic assumptions were adjusted to more closely reflect actual and expected future experience.

The long-term expected rate of return on pension plan investments was established by the TCRS Board of Trustees in conjunction with the June 30, 2020 actuarial experience study. A blend of future capital market projections and historical market returns was used in a building-block method in which a best-estimate of expected future real rates of return (expected returns, net of pension plan investment expense and inflation) is developed for each major asset class. These best estimates are combined to produce the long-term expected rate of return by weighting the expected future real rates of return by the target asset allocation percentage and by adding expected inflation of 2.25 percent. The best estimates of geometric real rates of return and the TCRS investment policy target asset allocation for each major asset class are summarized in the following table:

Asset Class	Long-Term Expected Real Rate of Return	Target Allocation
U.S. equity	4.88%	31%
Developed market international equity	5.37%	14%
Emerging market international equity	6.09%	4%
Private equity and strategic lending	6.57%	20%
U.S. fixed income	1.20%	20%
Real estate	4.38%	10%
Short-term securities	0.00%	1%
		100%

The long-term expected rate of return on pension plan investments was established by the TCRS Board of Trustees as 6.75 percent based on a blending of the factors described above.

NOTE 14 - TEACHER LEGACY PENSION PLAN (Continued)

Pension Liabilities (Assets), Pension Expense (Negative Pension Expense), and Deferred Outflows of Resources and Deferred Inflows of Resources Related to Pensions (Continued)

Discount Rate
The discount rate used to measure the total pension liability was 6.75 percent. The projection of cash flows used to determine the discount rate assumed that employee contributions will be made at the current rate and that contributions from all the LEAs will be made at the actuarially determined contribution rate pursuant to an actuarial valuation in accordance with the funding policy of the TCRS Board of Trustees and as required to be paid by state statute. Based on those assumptions, the pension plan's fiduciary net position was projected to be available to make projected future benefit payments of current active and inactive members. Therefore, the long-term expected rate of return on pension plan investments was applied to all periods of projected benefit payments to determine the total pension liability.

Sensitivity of the Proportionate Share of Net Pension Liability (Asset) to Changes in the Discount Rate
The following presents the School's proportionate share of the net pension liability (asset) calculated using the discount rate of 6.75 percent, as well as what the School's proportionate share of the net pension liability (asset) would be if it were calculated using a discount rate that is 1-percentage-point lower (5.75 percent) or 1-percentage-point higher (7.75 percent) than the current rate:

	1% Decrease (5.75%)	Current Discount Rate (6.75%)	1% Increase (7.75%)
Proportionate share of the net pension liability (asset)	$ 124,866	$ (98,293)	$ (283,372)

Pension Plan Fiduciary Net Position
Detailed information about the pension plan's fiduciary net position is available in a separately issued TCRS financial report.

Payable to Pension Plan
At June 30, 2025, the School reported a payable of $2,306 for the outstanding amount of contributions to the pension plan required at the year ended June 30, 2025.

NOTE 15 - TEACHER RETIREMENT PLAN

General Information about the Pension Plan

Plan Description
The TCRS was created by state statute under Tennessee Code Annotated Title 8, Chapters 34-37. The TCRS Board of Trustees is responsible for the proper operation and administration of all employer pension plans of the TCRS. The Tennessee Treasury Department, an agency in the legislative branch of state government, administers the plans of the TCRS. The TCRS issues a publicly available financial report that can be obtained at https://treasury.tn.gov/Retirement/Boards-and-Governance/Reporting-and-Investment-Policies.

Teachers employed by the School with membership in the TCRS before July 1, 2014 are provided with pensions through the Teacher Legacy Pension Plan, a cost sharing multiple-employer pension plan administered by the TCRS. The Teacher Legacy Pension Plan closed to new membership on June 30, 2014 but will continue providing benefits to existing members and retirees.

The Teacher Retirement Plan became effective July 1, 2014 for teachers employed by Local Education Agencies (LEAs) after June 30, 2014. The Teacher Retirement Plan is a separate cost-sharing, multiple-employer defined benefit plan.

NOTE 15 - TEACHER RETIREMENT PLAN (Continued)

General Information about the Pension Plan (Continued)

Benefits Provided

Tennessee Code Annotated Title 8, Chapters 34-37 establishes the benefit terms and can be amended only by the Tennessee General Assembly. Members of the Teacher Retirement Plan are eligible to retire with an unreduced benefit at age 65 with 5 years of service credit or pursuant to the rule of 90 in which the member's age and service credit total 90. Benefits are determined by a formula using the member's highest five consecutive years average compensation and the member's years of service credit. A reduced early retirement benefit is available at age 60 and vested or pursuant to the rule of 80. Members are vested with five years of service credit. Service-related disability benefits are provided regardless of length of service. Five years of service is required for nonservice-related disability eligibility. The service-related and nonservice-related disability benefits are determined in the same manner as a service retirement benefit but are reduced by 10 percent and include projected service credits. A variety of death benefits are available under various eligibility criteria. Member and beneficiary annuitants are entitled to automatic cost of living adjustments (COLAs) after retirement. A COLA is granted each July for annuitants retired prior to the 2nd of July of the previous year. The COLA is based on the change in the consumer price index (CPI) during the prior calendar year, capped at 3 percent, and applied to the current benefit. No COLA is granted if the change in the CPI is less than one-half percent. A one percent COLA is granted if the CPI change is between one-half percent and one percent. A member who leaves employment may withdraw their employee contributions, plus any accumulated interest. Under the Teacher Retirement Plan, benefit terms and conditions, including COLAs, can be adjusted on a prospective basis. Moreover, there are defined cost controls and unfunded liability controls that provide for the adjustment of benefit terms and conditions on an automatic basis.

Contributions

Contributions for teachers are established in the statutes governing the TCRS and may only be changed by the Tennessee General Assembly or by automatic cost controls set out in law. Teachers contribute 5 percent of salary. The LEAs make employer contributions at the rate set by the Board of Trustees as determined by an actuarial valuation. Per the statutory provisions governing the TCRS, the employer contribution rate cannot be less than 4 percent, except in years when the maximum funded level, as established by the TCRS Board of Trustees, is reached. By law, employer contributions of the Teacher Retirement Plan are required to be paid. The TCRS may intercept the state shared taxes of the sponsoring governmental entity of the LEA if the required employer contributions are not remitted. Employer contributions contractually required by the School for the year ended June 30, 2025 to the Teacher Retirement Plan were $25,853, which is 3.08 percent of covered payroll. The employer rate, when combined with member contributions, is expected to finance the costs of benefits earned by members during the year, the cost of administration, as well as an amortized portion of any unfunded liability.

Pension Liabilities (Assets), Pension Expense (Negative Pension Expense), and Deferred Outflows of Resources and Deferred Inflows of Resources Related to Pensions

Pension Liabilities (Assets)

At June 30, 2025, the School reported a liability (asset) of $(18,565) for its proportionate share of the net pension liability (asset). The net pension liability (asset) was measured as of June 30, 2024, and the total pension liability used to calculate the net pension liability (asset) was determined by an actuarial valuation as of that date. The School's proportion of the net pension liability (asset) was based on the School's share of contributions to the pension plan relative to the contributions of all participating LEAs. At the measurement date of June 30, 2024, the School's proportion was 0.026052 percent. The proportion measured as of June 30, 2023 was 0.010480 percent.

Pension Expense (Negative Pension Expense)

For the year ended June 30, 2025, the School recognized pension expense (negative pension expense) of $14,072.

NOTE 15 - TEACHER RETIREMENT PLAN (Continued)

Pension Liabilities (Assets), Pension Expense (Negative Pension Expense), and Deferred Outflows of Resources and Deferred Inflows of Resources Related to Pensions (Continued)

Deferred Outflows of Resources and Deferred Inflows of Resources
For the year ended June 30, 2025, the School reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

	Deferred Outflows of Resources	Deferred Inflows of Resources
Differences between expected and actual experience	$ 1,534	$ 5,704
Net difference between projected and actual earnings on pension plan investments	-	3,132
Changes in assumptions	7,377	-
Changes in proportion of net pension liability (asset)	-	13,774
LEA's contributions subsequent to the measurement date of June 30, 2024	25,853	(not applicable)
Total	$ 34,764	$ 22,610

The School's employer contributions of $25,853 reported as pension related deferred outflows of resources subsequent to the measurement date, will be recognized as a reduction (increase) to the net pension liability (asset) in the year ended June 30, 2026. Other amounts reported as deferred outflows of resources and deferred inflows of resources related to pensions will be recognized in pension expense as follows:

Year Ended June 30:	
2026	$ (3,255)
2027	$ 1,078
2028	$ (2,596)
2029	$ (2,579)
2030	$ (1,056)
Thereafter	$ (5,291)

In the table above, positive amounts will increase pension expense, while negative amounts will decrease pension expense.

Actuarial assumptions
The total pension liability in the June 30, 2024 actuarial valuation was determined using the following actuarial assumptions, applied to all periods included in the measurement:

Inflation	2.25 percent
Salary increases	Graded salary ranges from 8.72 to 3.44 percent based on age, including inflation, averaging 4.00 percent
Investment rate of return	6.75 percent, net pension plan investment expenses, including inflation
Cost-of living adjustment	2.125 percent

Mortality rates were based on actual experience including an adjustment for some anticipated improvement.

NOTE 15 - TEACHER RETIREMENT PLAN (Continued)

Pension Liabilities (Assets), Pension Expense (Negative Pension Expense), and Deferred Outflows of Resources and Deferred Inflows of Resources Related to Pensions (Continued)

Actuarial assumptions (Continued)
The actuarial assumptions used in the June 30, 2024 actuarial valuation were based on the results of an actuarial experience study performed for the period July 1, 2016 through June 30, 2020. As a result of the 2020 actuarial experience study, investment and demographic assumptions were adjusted to more closely reflect actual and expected future experience.

The long-term expected rate of return on pension plan investments was established by the TCRS Board of Trustees in conjunction with the June 30, 2020 actuarial experience study. A blend of future capital market projections and historical market returns was used in a building-block method in which a best-estimate of expected future real rates of return (expected returns, net of pension plan investment expense and inflation) is developed for each major asset class. These best estimates are combined to produce the long-term expected rate of return by weighting the expected future real rates of return by the target asset allocation percentage and by adding expected inflation of 2.25 percent. The best estimates of geometric real rates of return and the TCRS investment policy target asset allocation for each major asset class are summarized in the following table:

Asset Class	Long-Term Expected Real Rate of Return	Target Allocation
U.S. equity	4.88%	31%
Developed market international equity	5.37%	14%
Emerging market international equity	6.09%	4%
Private equity and strategic lending	6.57%	20%
U.S. fixed income	1.20%	20%
Real estate	4.38%	10%
Short-term securities	0.00%	1%
		100%

The long-term expected rate of return on pension plan investments was established by the TCRS Board of Trustees as 6.75 percent based on a blending of the factors described above.

Discount Rate
The discount rate used to measure the total pension liability was 6.75 percent. The projection of cash flows used to determine the discount rate assumed that employee contributions will be made at the current rate and that contributions from all LEAs will be made at the actuarially determined contribution rate pursuant to an actuarial valuation in accordance with the funding policy of the TCRS Board of Trustees and as required to be paid by state statute. Based on those assumptions, the pension plan's fiduciary net position was projected to be available to make projected future benefit payments of current active and inactive members. Therefore, the long-term expected rate of return on pension plan investments was applied to all periods of projected benefit payments to determine the total pension liability.

Sensitivity of the Proportionate Share of Net Pension Liability (Asset) to Changes in the Discount Rate
The following presents the School's proportionate share of the net pension liability (asset) calculated using the discount rate of 6.75 percent, as well as what the School's proportionate share of the net pension liability (asset) would be if it were calculated using a discount rate that is 1-percentage-point lower (5.75 percent) or 1-percentage-point higher (7.75 percent) than the current rate:

	1% Decrease (5.75%)	Current Discount Rate (6.75%)	1% Increase (7.75%)
Proportionate share of the net pension liability (asset)	$ 48,962	$ (18,565)	$ (68,820)

NOTE 15 - TEACHER RETIREMENT PLAN (Continued)

Pension Liabilities (Assets), Pension Expense (Negative Pension Expense), and Deferred Outflows of Resources and Deferred Inflows of Resources Related to Pensions (Continued)

Pension Plan Fiduciary Net Position
Detailed information about the pension plan's fiduciary net position is available in a separately issued TCRS financial report.

Payable to Pension Plan
At June 30, 2025, the School reported a payable of $2,342 for the outstanding amount of contributions to the pension plan required at the year ended June 30, 2025.

NOTE 16 - EMPLOYER IN PUBLIC EMPLOYEE RETIREMENT PLAN (LEGACY)

The School participates in the Hamilton County plan.

Employees of the School are provided a defined benefit pension plan through the Public Employee Retirement Plan, an agent multiple-employer pension plan administered by the TCRS. Full disclosures and schedules will be available for the year ended June 30, 2026.

At the measurement date of June 30, 2024, no employees of the School were covered by the benefit terms.

Employer contributions by the School for the year ended June 30, 2025 to the Public Employee Retirement Plan were $4,310 based on a rate of 14.70 percent of covered payroll. Covered payroll totaled $29,317.

For the year ended June 30, 2025, the School reported deferred outflows of $4,310 for current year employer contributions.

At June 30, 2025, the School reported a payable of $376 for the outstanding amount of contributions to the pension plan required at the year ended June 30, 2025.

NOTE 17 - EMPLOYER IN PUBLIC EMPLOYEE RETIREMENT PLAN (WITH COST CONTROLS)

The School participates in the Hamilton County plan.

General Information about the Pension Plan

Plan description
Employees of Hamilton County Schools are provided a defined benefit pension plan through the Public Employee Retirement Plan, an agent multiple-employer pension plan administered by the TCRS. The School participates in the Hamilton County plan. The TCRS was created by state statute under Tennessee Code Annotated, Title 8, Chapters 34-37. The TCRS Board of Trustees is responsible for the proper operation and administration of the TCRS. The Tennessee Treasury Department, an agency in the legislative branch of state government, administers the plans of the TCRS. The TCRS issues a publicly available financial report that can be obtained at https://treasury.tn.gov/Retirement/Boards-and-Governance/Reporting-and-Investment-Policies.

NOTE 17 - EMPLOYER IN PUBLIC EMPLOYEE RETIREMENT PLAN (WITH COST CONTROLS) (Continued)

General Information about the Pension Plan (Continued)

Benefits provided

Tennessee Code Annotated, Title 8, Chapters 34-37, establishes the benefit terms and can be amended only by the Tennessee General Assembly. The chief legislative body may adopt the benefit terms permitted by statute. Members are eligible to retire with an unreduced benefit at age 65 with 5 years of service credit or pursuant to the rule of 90 in which the member's age and service credit total 90. Benefits are determined by a formula using the member's highest five consecutive year average compensation and the member's years of service credit. Reduced benefits for early retirement are available at age 60 and vested or pursuant to the rule of 80 in which the member's age and service credit total 80. Members vest with five years of service credit. Service-related disability benefits are provided regardless of length of service. Five years of service is required for nonservice-related disability eligibility. The service-related and nonservice-related disability benefits are determined in the same manner as a service retirement benefit but are reduced 10 percent and include projected service credits. A variety of death benefits are available under various eligibility criteria.

Member and beneficiary annuitants are entitled to automatic cost of living adjustments (COLAs) after retirement. A COLA is granted each July for annuitants retired prior to the 2nd of July of the previous year. The COLA is based on the change in the consumer price index (CPI) during the prior calendar year, capped at 3 percent, and applied to the current benefit. No COLA is granted if the change in the CPI is less than one-half percent. A one percent COLA is granted if the CPI change is between one-half percent and one percent. A member who leaves employment may withdraw their employee contributions, plus any accumulated interest. Moreover, there are defined cost controls and unfunded liability controls that provide for the adjustment of benefit terms and conditions on an automatic basis.

Employees covered by benefit terms

At the measurement date of June 30, 2024, the following employees of the School were covered by the benefit terms:

Inactive employees or beneficiaries currently receiving benefits	0
Inactive employees entitled to but not yet receiving benefits	0
Active employees	17
Total employees	17

Contributions

Contributions for employees are established in the statutes governing the TCRS and may only be changed by the Tennessee General Assembly or by automatic cost controls set out in law. Employees contribute 5 percent of salary. The School makes employer contributions at the rate set by the Board of Trustees as determined by an actuarial valuation. Per the statutory provisions governing the TCRS, the employer contribution rate cannot be less than 4 percent, except in years when the maximum funded level, as established by the TCRS Board of Trustees is reached. By law, employer contributions are required to be paid. The TCRS may intercept the School's state shared taxes if required employer contributions are not remitted. Employer contributions in relation to the actuarially determined contribution by the School for the year ended June 30, 2025 to the Public Employee Retirement Plan were $9,370 based on a rate of 2.35 percent of covered payroll. The employer rate, when combined with member contributions, is expected to finance the costs of benefits earned by members during the year, the cost of administration, as well as an amortized portion of any unfunded liability.

NOTE 17 - EMPLOYER IN PUBLIC EMPLOYEE RETIREMENT PLAN (WITH COST CONTROLS) (Continued)

Net Pension Liability (Asset)

Pension liabilities (assets)
The School's net pension liability (asset) was measured as of June 30, 2024, and the total pension liability used to calculate net pension liability (asset) was determined by an actuarial valuation as of that date.

Actuarial assumptions
The total pension liability as of the June 30, 2024 actuarial valuation was determined using the following actuarial assumptions, applied to all periods included in the measurement:

Inflation	2.25 percent
Salary increases	Graded salary ranges from 8.72 to 3.44 percent based on age, including inflation, averaging 4.00 percent
Investment rate of return	6.75 percent, net of pension plan investment expenses, including inflation
Cost-of-living adjustment	2.125 percent

Mortality rates were based on actual experience including an adjustment for some anticipated improvement.

The actuarial assumptions used in the June 30, 2024 actuarial valuation are based on the results of an actuarial experience study performed for the period July 1, 2016 through June 30, 2020. The demographic assumptions were adjusted to more closely reflect actual and expected future experience.

The long-term expected rate of return on pension plan investments was established by the TCRS Board of Trustees in conjunction with the June 30, 2020 actuarial experience study. A blend of future capital market projections and historical market returns was used in a building-block method in which a best-estimate of expected future real rates of return (expected returns, net of pension plan investment expense and inflation) is developed for each major asset class. These best estimates are combined to produce the long-term expected rate of return by weighting the expected future real rates of return by the target asset allocation percentage and by adding expected inflation of 2.25 percent. The best estimates of geometric real rates of return and the TCRS investment policy target asset allocation for each major asset class are summarized in the following table:

Asset Class	Long-Term Expected Real Rate of Return	Target Allocation
U.S. equity	4.88%	31%
Developed market international equity	5.37%	14%
Emerging market international equity	6.09%	4%
Private equity and strategic lending	6.57%	20%
U.S. fixed income	1.20%	20%
Real estate	4.38%	10%
Short-term securities	0.00%	1%
		100%

The long-term expected rate of return on pension plan investments was established by the TCRS Board of Trustees as 6.75 percent based on a blending of the factors described above.

NOTE 17 - EMPLOYER IN PUBLIC EMPLOYEE RETIREMENT PLAN (WITH COST CONTROLS) (Continued)

Net Pension Liability (Asset) (Continued)

Discount rate

The discount rate used to measure the total pension liability was 6.75 percent. The projection of cash flows used to determine the discount rate assumed that employee contributions will be made at the current rate and that contributions from the School will be made at the actuarially determined contribution rate pursuant to an actuarial valuation in accordance with the funding policy of the TCRS Board of Trustees and as required to be paid by state statute. Based on those assumptions, the pension plan's fiduciary net position was projected to be available to make projected future benefit payments of current active and inactive members. Therefore, the long-term expected rate of return on pension plan investments was applied to all periods of projected benefit payments to determine the total pension liability.

Changes in the Net Pension Liability (Asset)

	Increase (Decrease)		
	Total Pension Liability (a)	Plan Fiduciary Net Position (b)	Net Pension Liability (Asset) (a) - (b)
Balance at 6/30/23	$ 69,650	$ 69,469	$ 181
Changes for the year:			
Service cost	8,103	-	8,103
Interest	2,890	-	2,890
Changes of benefit terms	-	-	-
Differences between expected and actual experience	2,701	-	2,701
Changes in assumptions	-	-	-
Contributions - employer	-	3,837	(3,837)
Contributions - employees	-	7,061	(7,061)
Net investment income	-	3,919	(3,919)
Benefit payments, including refunds of employee contributions	(445)	(445)	-
Administrative expense	-	(226)	226
Change in proportionate share	(34,712)	(34,441)	(271)
Net changes	(21,463)	(20,295)	(1,168)
Balance at 6/30/24	$ 48,187	$ 49,174	$ (987)

Sensitivity of the net pension liability (asset) to changes in the discount rate

The following presents the net pension liability (asset) of the School calculated using the discount rate of 6.75 percent, as well as what the net pension liability (asset) would be if it were calculated using a discount rate that is 1-percentage-point lower (5.75 percent) or 1-percentage-point higher (7.75 percent) than the current rate:

	1% Decrease (5.75%)	Current Discount Rate (6.75%)	1% Increase (7.75%)
Net pension liability (asset)	$ 8,270	$ (987)	$ (7,961)

NOTE 17 - EMPLOYER IN PUBLIC EMPLOYEE RETIREMENT PLAN (WITH COST CONTROLS) (Continued)

Pension Expense (Negative Pension Expense) and Deferred Outflows of Resources and Deferred Inflows of Resources Related to Pensions

Pension expense (negative pension expense)
For the year ended June 30, 2025, the School recognized pension expense (negative pension expense) of $2,465.

Deferred outflows of resources and deferred inflows of resources
For the year ended June 30, 2025, the School reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

	Deferred Outflows of Resources	Deferred Inflows of Resources
Differences between expected and actual experience	$ 5,926	$ 26
Net difference between projected and actual earnings on pension plan investments	-	516
Changes in assumptions	740	-
Contributions subsequent to the measurement date of June 30, 2024	9,370	(not applicable)
Total	$ 16,036	$ 542

The amount shown above for "Contributions subsequent to the measurement date of June 30, 2024," will be recognized as a reduction (increase) to net pension liability (asset) in the following measurement period.

Amounts reported as deferred outflows of resources and deferred inflows of resources related to pensions will be recognized in pension expense as follows:

Year Ended June 30:	
2026	$ 981
2027	$ 1,498
2028	$ 1,016
2029	$ 788
2030	$ 898
Thereafter	$ 941

In the table shown above, positive amounts will increase pension expense while negative amounts will decrease pension expense.

Payable to the Pension Plan
At June 30, 2025, the School reported a payable of $730 for the outstanding amount of contributions to the pension plan required at the year ended June 30, 2025.

NOTE 18 - TCRS STABILIZATION TRUST

Legal Provisions

The School is a member of the Tennessee Consolidated Retirement System (TCRS) Stabilization Reserve Trust. The School has placed funds into the irrevocable trust as authorized by statute under *Tennessee Code Annotated (TCA),* Title 8, Chapters 34-37. The TCRS Board of Trustees is responsible for the proper operation and administration of the trust. Funds of trust members are held and invested in the name of the trust for the benefit of each member. Each member's funds are restricted for the payment of retirement benefits of that member's employees. Trust funds are not subject to the claims of general creditors of the School.

The trust is authorized to make investments as directed by the TCRS Board of Trustees. The School may not impose any restrictions on investments placed by the trust on their behalf.

Investment Balances

Assets of the TCRS, including the Stabilization Reserve Trust, are invested in the Tennessee Retiree Group Trust (TRGT). The TRGT is not registered with the Securities and Exchange Commission (SEC) as an investment company. The State of Tennessee has not obtained a credit quality rating for the TRGT from a nationally recognized credit ratings agency. The fair value of investment positions in the TRGT is determined daily based on the fair value of the pool's underlying portfolio. Furthermore, TCRS had not obtained or provided any legally binding guarantees to support the value of participant shares during the fiscal year. There are no restrictions on the sale or redemption of shares.

Investments are reported at fair value. Securities traded on a national exchange are valued at the last reported sales price. Investment income consists of realized and unrealized appreciation (depreciation) in the fair value of investment and interest and dividend income. Interest income is recognized when earned. Securities and securities transactions are recorded in the financial statements on a trade-date basis. The fair value of assets of the TRGT held at June 30, 2025, represents the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants. Assets held are categorized for fair value measurement within the fair value hierarchy established by GAAP. The hierarchy is based on the valuation inputs used to measure the fair value of the asset and give the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (Level 1 measurements) and the lowest priority to unobservable inputs (Level 3 measurements).

Level 1 - Unadjusted quoted prices for identical assets or liabilities in active markets that can be accessed at the measurement date.

Level 2 - Quoted prices for similar assets or liabilities in active markets; quoted prices for identical or similar assets or liabilities in markets that are not active; assets or liabilities that have a bid-ask spread price in an inactive dealer market, brokered market and principal-to-principal market; and Level 1 assets or liabilities that are adjusted.

Level 3 - Valuations derived from valuation techniques in which significant inputs are unobservable.

Investments where fair value is measured using the Net Asset Value ("NAV") per share have no readily determinable fair value and have been determined to be calculated consistent with FASB principles for investment companies.

NOTE 18 - TCRS STABILIZATION TRUST (Continued)

Investment Balances (Continued)
Where inputs used in the measurement of fair value fall into different levels of the hierarchy, fair value of the instrument in its entirety is categorized based on the lowest level input that is significant to the valuation. This assessment requires professional judgement and as such management of the TRGT developed a fair value committee that worked in conjunction with the plan's custodian and investment professionals to make these valuations. All assets held were valued individually and aggregated into classes to be represented in the following table.

Short-term securities generally include investments in money market-type securities reported at cost plus accrued interest.

Equity and equity derivative securities classified in Level 1 are valued using last reported sales prices quoted in active markets that can be accessed at the measurement date. Equity and equity derivative securities classified in Level 2 are securities whose values are derived daily from associated traded securities. Equity securities classified in Level 3 are valued with last trade data having limited trading volume.

U.S. Treasury Bills, Bonds, Notes and Futures classified in Level 1 are valued using last reported sales prices quoted in active markets that can be accessed at the measurement date. Debt and debt derivative securities classified in Level 2 are valued using a bid-ask spread price from multiple independent brokers, dealers, or market principals, which are known to be actively involved in the market. Level 3 debt securities are valued using proprietary information, a single pricing source, or other unobservable inputs related to similar assets or liabilities.

Real estate investments classified in Level 3 are valued using the last valuations provided by external investment advisors or independent external appraisers. Generally, all direct real estate investments are appraised by a qualified independent appraiser(s) with the professional designation of Member of the Appraisal Institute ("MAI"), or its equivalent, every three (3) years beginning from the acquisition date of the property. The appraisals are performed using generally accepted valuation approaches applicable to the property type.

Investments in private mutual funds, traditional private equity funds, strategic lending funds and real estate funds that report using GAAP, the fair value, as well as the unfunded commitments, were determined using the prior quarter's NAV, as reported by the fund managers, plus the current cash flows. These assets were then categorized by investment strategy. In instances where the fund investment reported using non-GAAP standards, the investment was valued using the same method, but was classified in Level 3.

NOTE 18 - TCRS STABILIZATION TRUST (Continued)

Investment Balances (Continued)
On June 30, 2025, the School had the following investments held by the trust on its behalf:

Investment	Percentage Target Allocations	Weighted Average Maturity (days)	Maturities	Fair Value
Investments at Fair Value:				
U.S. equity	31%	N/A	N/A	$ 9,392
Developed market international equity	14%	N/A	N/A	4,242
Emerging market international equity	4%	N/A	N/A	1,212
Private equity and strategic lending	20%	N/A	N/A	6,060
U.S. fixed income	20%	N/A	N/A	6,060
Real estate	10%	N/A	N/A	3,030
Short-term securities	1%	N/A	N/A	303
Total				$ 30,299

	Fair Value Measurements Using			
Investment by Fair Value Level	Fair Value 6-30-2025	Quoted Prices in Active Markets for Identical Assets (Level 1)	Significant Other Observable Inputs (Level 2)	Significant Unobservable Inputs (Level 3)	NAV
U.S. equity	$ 9,392	$ 9,392	$ -	$ -	$ -
Developed market international equity	4,242	4,242	-	-	-
Emerging market international equity	1,212	1,212	-	-	-
Private equity and strategic lending	6,060	-	-	-	6,060
U.S. fixed income	6,060	-	6,060	-	-
Real estate	3,030	-	-	3,030	-
Short-term securities	303	-	303	-	-
Total	$ 30,299	$ 14,846	$ 6,363	$ 3,030	$ 6,060

Risks and Uncertainties
The trust's investments include various types of investment funds, which in turn invest in any combination of stock, bonds and other investments exposed to various risks, such as interest rate, credit, and market risk. Due to the level of risk associated with certain investment securities, it is at least reasonably possible that changes in the values of investment securities will occur in the near term and that such changes could materially affect the amounts reported for trust investments.

NOTE 18 - TCRS STABILIZATION TRUST (Continued)

Interest Rate Risk
Interest rate risk is the risk that changes in interest rates will adversely affect the fair value of an investment. The School does not have the ability to limit trust investment maturities as a means of managing its exposure to fair value losses arising from increasing interest rates.

Credit Risk
Credit risk is the risk that an issuer or other counterparty to an investment will not fulfill its obligations. The School does not have the ability to limit the credit ratings of individual investments made by the trust.

Concentration of Credit Risk
Concentration of credit risk is the risk of loss attributed to the magnitude of the School's investment in a single issuer. The School places no limit on the amount it may invest in one issuer.

Custodial Credit Risk
Custodial credit risk for investments is the risk that, in the event of a failure of the counterparty to a transaction, the School will not be able to recover the value of its investments or collateral securities that are in the possession of an outside party. Pursuant to the trust agreement, investments are held in the name of the trust for the benefit of the School to pay retirement benefits of the School's employees.

For further information concerning the School's investments with the TCRS Stabilization Reserve Trust, audited financial statements of the Tennessee Consolidated Retirement System may be obtained at https://treasury.tn.gov.

NOTE 19 - 401(K) PLAN

In addition to the TCRS pension plans, the School also participates in the State of Tennessee Deferred Compensation Plan II, a 401(k) defined contribution pension plan administered by Great West. In this plan, participants are immediately vested in all employee and, if applicable, employer contributions to the State 401(k) plan. Benefit terms are established and amended by T.C.A., Title 8, Chapter 25, Parts 1 and 3. Contribution rates are established and amended by T.C.A., Title 8, Chapter 25, Parts 1 and 3 and T.C.A., Title 8, Chapter 36, Part 9. In this plan teachers contribute 2% of their salary and also receive a 5% employer contribution. At year-end, the employer liability payable to the plan was $5,291. There were no forfeitures reflected in the current year expenses. Current year expenses for this plan totaled $121,774.

NOTE 20 - RELATED PARTY TRANSACTION

The spouse of the School's Chief Executive Officer received a W-2 for $4,054 from the School for maintenance work performed.

NOTE 21 - LITIGATION AND CLAIMS

Management is not aware of any litigation or claims that would be material to the School's financial statements.

NOTE 22 - CONTINGENT LIABILITIES

As of June 30, 2025, the School did not have any material contingent liabilities.

NOTE 23 - COMPLIANCE WITH FINANCE RELATED LEGAL AND CONTRACTUAL PROVISIONS

As of June 30, 2025, the School had no material violations of finance related legal and contractual provisions.

REQUIRED SUPPLEMENTARY INFORMATION OTHER THAN MD&A

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Schedule of Proportionate Share of the Net Pension Liability (Asset)
Teacher Legacy Pension Plan of the TCRS
Fiscal Year Ended June 30

	2023	2024
Proportion of the net pension liability (asset)	0.002785%	0.005705%
Proportionate share of the net pension liability (asset)	$ (32,833)	$ (98,293)
Covered payroll	$ 90,372	$ 191,288
Proportionate share of the net pension liability (asset) as a percentage of its covered payroll	-36.33%	-51.38%
Plan fiduciary net position as a percentage of the total liability (asset)	104.11%	105.76%

Notes to Schedule:
GASB 68 requires a 10-year schedule for this data to be presented starting with the implementation of GASB 68.
The information in this schedule is not required to be presented retroactively prior to the implementation date.

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Schedule of Contributions
Teacher Legacy Pension Plan of the TCRS
Fiscal Year Ended June 30

	2023	2024	2025
Contractually required contribution	$ 7,853	$ 12,865	$ 26,404
Contribution in relation to the contractually required contribution	7,853	12,865	26,404
Contribution deficiency (excess)	$ -	$ -	$ -
Covered payroll	$ 90,372	$ 191,288	$ 423,056
Contributions as a percentage of covered payroll	8.69%	6.73%	6.24%

Notes to Schedule:
GASB 68 requires a 10-year schedule for this data to be presented starting with the implementation of GASB 68.
The information in this schedule is not required to be presented retroactively prior to the implementation date.

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Schedule of Proportionate Share of the Net Pension Liability (Asset)
Teacher Retirement Plan of the TCRS
Fiscal Year Ended June 30

	2022	2023	2024
Proportion of the net pension liability (asset)	0.000293%	0.010480%	0.026052%
Proportionate share of the net pension liability (asset)	$ (91)	$ (4,447)	$ (18,565)
Covered payroll	$ 5,000	$ 208,446	$ 611,899
Proportionate share of the net pension liability (asset) as a percentage of its covered payroll	-1.77%	-2.13%	-3.03%
Plan fiduciary net position as a percentage of the total pension liability (asset)	104.55%	104.97%	106.49%

Notes to Schedule:
GASB 68 requires a 10-year schedule for this data to be presented starting with the implementation of GASB 68.
The information in this schedule is not required to be presented retroactively prior to the implementation date.

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Schedule of Contributions
Teacher Retirement Plan of the TCRS
Fiscal Year Ended June 30

	2022	2023	2024	2025
Contractually required contribution	$ 101	$ 5,982	$ 18,054	$ 25,853
Contribution in relation to the contractually required contribution	101	5,982	18,054	25,853
Contribution deficiency (excess)	$ -	$ -	$ -	$ -
Covered payroll	$ 5,000	$ 208,446	$ 611,899	$ 838,867
Contributions as a percentage of covered payroll	2.01%	2.87%	2.95%	3.08%

Notes to Schedule:
GASB 68 requires a 10-year schedule for this data to be presented starting with the implementation of GASB 68.
The information in this schedule is not required to be presented retroactively prior to the implementation date.

In 2025, the School placed the actuarially determined contribution rate (3.08%) of covered payroll into the pension plan and placed 0.92% of covered payroll into the Penion Stabilization Reserve Trust.

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Schedule of Changes in Net Pension Liability (Asset) and Related Ratios
Based on Participation in the Public Employee Pension Plan of the TCRS
Fiscal Year Ended June 30

The School participates in the Hamilton County Retirement Plan (with Cost Controls).

Total pension liability	2022	2023	2024
Service cost	$ 2,871	$ 12,934	$ 8,103
Interest	793	4,158	2,890
Changes in benefit terms	-	-	-
Differences between actual and expected experience	656	4,237	2,701
Change of assumptions	-	-	-
Benefit payments, including refunds of employee contributions	-	(682)	(445)
Change in proportionate share	-	44,683	(34,712)
Net change in total pension liability	4,320	65,330	(21,463)
Total pension liability - beginning	-	4,320	69,650
Total pension liability - ending (a)	4,320	69,650	48,187
Plan fiduciary net position			
Contributions - employer	1,010	6,053	3,837
Contributions - employee	2,434	11,485	7,061
Net investment income	(464)	3,878	3,919
Benefit payments, including refunds of employee contributions	-	(682)	(445)
Administrative expense	(120)	(328)	(226)
Change in proportionate share	-	46,203	(34,441)
Net change in plan fiduciary net position	2,860	66,609	(20,295)
Plan fiduciary net position - beginning	-	2,860	69,469
Plan fiduciary net position - ending (b)	2,860	69,469	49,174
Net pension liability (asset) - ending (a) - (b)	$ 1,460	$ 181	$ (987)
Plan fiduciary net position as a percentage of total pension liability	66.20%	100.26%	102.05%
Covered payroll	$ 5,000	$ 233,696	$ 141,587
Net pension liability (asset) as a percentage of covered payroll	29.20%	0.08%	-0.70%

Notes to Schedule:
GASB 68 requires a 10-year schedule for this data to be presented starting with the implementation of GASB 68.
The information in this schedule is not required to be presented retroactively prior to the implementation date.

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Schedule of Contributions Based on Participation
in the Public Employee Pension Plan of the TCRS
Fiscal Year Ended June 30

The School participates in the Hamilton County Retirement Plan (with Cost Controls).

	2023	2024	2025
Actuarially determined contribution	$ 6,053	$ 3,837	$ 9,370
Contributions in relation to the actuarially determined contribution	6,053	3,837	9,370
Contribution deficiency (excess)	$ -	$ -	$ -
Covered payroll	$ 233,696	$ 141,587	$ 397,941
Contributions as a percentage of covered payroll	2.59%	2.71%	2.35%

Notes to Schedule:
GASB 68 requires a 10-year schedule for this data to be presented starting with the implementation of GASB 68.
The information in this schedule is not required to be presented retroactively prior to the implementation date.

Valuation date: Actuarially determined contribution rates for fiscal year 2025 were calculated based on the June 30, 2023 actuarial valuation.

Methods and assumptions used to determine contribution rates:

Actuarial cost method	Entry age normal
Amortization method	Level dollar, closed (not to exceed 20 years)
Remaining amortization period	Varies by year
Asset valuation	10-year smoothed wthin a 20 percent corridor to market value
Inflation	2.25 percent
Salary increase	Graded salary ranges from 8.72 to 3.44 percent based on age, including inflation, averaging 4.00 percent
Investment rate of return	6.75 percent, net of investment expense, including inflation
Retirement age	Pattern of retirement determined by experience study
Mortality	Customized table based on actual experience including an adjustment for some anticipated improvement
Cost of living adjustments	2.125 percent

OTHER SUPPLEMENTARY INFORMATION

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Schedule of Expenditures of Federal and State Awards
Year Ended June 30, 2025

Federal Agency/Pass-through Agency/ State Grantor Program or Cluster Title	Assistance Listing Number	(Receivable) Deferred July 1, 2024	Receipts	Expenditures	(Receivable) Deferred June 30, 2025
FEDERAL FINANCIAL AWARDS					
U.S. Department of Education					
Passed through Hamilton County Department of Education:					
Special Education Cluster:					
Special Education - Grants to States:					
IDEA - Part B	84.027	$ -	$ 55,063	$ 77,791	$ (22,728)
Title II	84.027	-	2,005	2,005	-
Title IV	84.027	-	6,080	6,080	-
Total Special Education Cluster		-	63,148	85,876	(22,728)
U.S. Department of Agriculture					
Child Nutrition Cluster:					
National School Lunch Program	10.555	-	25,785	28,502	(2,717)
Total Child Nutrition Cluster		-	25,785	28,502	(2,717)
Total federal financial awards		-	88,933	114,378	(25,445)
STATE FINANCIAL AWARDS					
Tennessee Department of Education					
Charter School Facilities		-	437,095	437,095	-
TOTAL FEDERAL AND STATE AWARDS		$ -	$ 526,028	$ 551,473	$ (25,445)

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Notes to the Schedule of Expenditures of Federal and State Awards
Year Ended June 30, 2025

NOTE 1 - BASIS OF PRESENTATION

The accompanying Schedule of Expenditures of Federal and State Awards includes the federal and state grant activity of Ivy Academy's Skillern Elementary School and is presented on the modified accrual basis of accounting.

NOTE 2 - INDIRECT COST RATE

Ivy Academy's Skillern Elementary School has not elected to use the 10-percent de minimis indirect cost rate or to allocate any indirect cost.

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Schedule of Changes in Long-term Debt by Individual Issue
June 30, 2025

Description of Indebtedness	Original Amount of Issue	Interest Rate	Date of Issue	Final Maturity Date	Outstanding 7/1/2024	Issued During Period	Paid and/or Matured During Period	Refunded During Period	Outstanding 6/30/2025
Governmental Activities									
Other Loans Payable									
Payable through General Fund									
Line of credit - First Horizon Bank	$ 50,000	8.50%	07/01/22	N/A	$ 39,499	$ -	$ (11,231)	$ -	$ 28,268
Line of credit - Citizens Tri-County Bank	$ 50,350	9.00%	08/01/23	N/A	44,095	-	(23,993)	-	20,102
Line of credit - First Horizon Bank	$ 500,000	6.857%	01/31/25	N/A	-	500,000	-	-	500,000
Line of credit - First Horizon Bank	$ 2,174,853	6.737%	06/12/25	N/A	-	2,174,853	-	-	2,174,853
Total Other Loans Payable					$ 83,594	$ 2,674,853	$ (35,224)	$ -	$ 2,723,223

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Schedule of Lease Requirements by Year
June 30, 2025

LEASED MODULAR BUILDINGS

Maturing June 30,	Principal	Interest	Total
2026	$ 142,261	$ 28,475	$ 170,736
2027	154,067	16,669	170,736
2028	123,885	4,167	128,052
Total	$ 420,213	$ 49,311	$ 469,524

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Schedule of Changes in Lease Obligations
June 30, 2025

Description of Indebtedness	Original Amount of Issue	Interest Rate	Date of Issue	Maturity Date	Outstanding 7/1/2024	Issued During Period	Paid and/or Matured During Period	Remeasurements	Outstanding 6/30/2025
Governmental Activities									
Lease Payable									
Payable through General Fund									
Modular buildings	$ 706,381	8.00%	04/01/23	03/01/28	$ 551,571	$ -	$ (131,358)	$ -	$ 420,213

III. INTERNAL CONTROL AND COMPLIANCE SECTION

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INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH *GOVERNMENT AUDITING STANDARDS*

To the Board of Directors
Ivy Academy's Skillern Elementary School

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of the governmental activities and the major fund of Ivy Academy's Skillern Elementary School as of and for the year ended June 30, 2025, and the related notes to the financial statements, which collectively comprise Ivy Academy's Skillern Elementary School's basic financial statements and have issued our report thereon dated November 10, 2025.

Report on Internal Control over Financial Reporting

In planning and performing our audit of the financial statements, we considered Ivy Academy's Skillern Elementary School's internal control over financial reporting (internal control) as a basis for designing the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of Ivy Academy's Skillern Elementary School's internal control. Accordingly, we do not express an opinion on the effectiveness of Ivy Academy's Skillern Elementary School's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses or significant deficiencies may exist that were not identified.

Report on Compliance and Other Matters

As part of obtaining reasonable assurance about whether Ivy Academy's Skillern Elementary School's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts and grant agreements, noncompliance with which could have a direct and material effect on the financial statements. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Johnson, Murphey & Wright, P.C.

Chattanooga, Tennessee
November 10, 2025

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Schedule of Findings and Responses
June 30, 2025

SUMMARY OF AUDITOR'S RESULTS

Opinion:

Unmodified opinion issued on the financial statements in accordance with auditing standards generally accepted in the United States of America and *Government Auditing Standards* issued by the Comptroller General of the United States.

Internal Control Reportable Conditions:

No material weaknesses were identified.
No significant deficiencies were reported.

Material Noncompliance:

No instances were noted.

IVY ACADEMY'S SKILLERN ELEMENTARY SCHOOL
Schedule of Prior Audit Findings
June 30, 2025

Prior Year Finding Number	Finding Title	Status/Current Year Finding Number
2024-001	Property Tax Exemption (Original finding 2024-001)	Corrected

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Pkwy.
Chattanooga, TN 37421

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

From: Dr. Zac Brown, Chief Talent Officer, Talent

Date: Department January 15, 2026

Subject: Request for new and updated job class description

Board Agenda Category:

- ☐ Consent Agenda
- ☑ Action Item
- ☐ Reports and Information

In alignment with policy 5.103 and 5.101, the following new and updated job class descriptions are presented to you for review. The updates include job descriptions being updated to reflect the current essential job responsibilities of existing job classes.

Job Class Descriptions:

Job Title	Purpose	Job Details
Educator Preparation Program (EPP) Facilitator	The purpose of this position is to plan and deliver content and curriculum for teachers enrolled in Hamilton County Schools' job-embedded Educator Preparation Program (EPP), Pathways to Teaching. This role will partner with EPP staff, mentors, administrators, and other stakeholders to provide support for alternative certification teachers to ensure they are equipped with the pedagogical knowledge and instructional skills necessary to promote student success and achievement and increase teacher retention.	Min $60,333 260 days calendar Occupied
Exceptional Education Individual Student Support Nurse	The purpose of this classification is to provide individualized skilled nursing care and academic support to a student with complex medical, physical, and educational needs. The role integrates responsibilities of an Exceptional	Min $34,928.78 201 days calendar New Job Class

	Education Ancillary Attendant and a Licensed Practical Nurse (LPN), ensuring continuous health monitoring, physical assistance, and instructional support throughout the school day. The incumbent collaborates with school health and instructional teams to implement and maintain the student's Individualized Education Program (IEP), Individualized Health Plan (IHP), and Emergency Action Plan (EAP), promoting safety, well-being, and academic success.	

Enclosure: Job Descriptions (2)

Opportunity 2030 Commitment Connection

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

HAMILTON COUNTY SCHOOLS

Job Description

Job Title:	**Educator Preparation Program (EPP) Facilitator**		
Reports to:	**Educator Preparation Program (EPP) Administrator**		
Job Class:	**L167**	FLSA Status:	**Exempt**
Pay Grade:	**Certified Scale (1018)**	Position Certified:	**Yes**

Hamilton County Schools has the right to revise this job description at any time and it does not in any way represent a contract of employment.

Purpose of Job

The purpose of this position is to plan and deliver content and curriculum for teachers enrolled in Hamilton County Schools' job-embedded Educator Preparation Program (EPP), Pathways to Teaching. This role will partner with EPP staff, mentors, administrators, and other stakeholders to provide support for alternative certification teachers to ensure they are equipped with the pedagogical knowledge and instructional skills necessary to promote student success and achievement and increase teacher retention.

Primary Job Duties and Responsibilities

Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out but may be considered incidental in the performance of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the duties herein described.

- Ensures EPP content, curriculum, and delivery aligns with State and program standards.
- Prepares and delivers all EPP coursework, records attendance, grades assignments and projects, and provides meaningful candidate feedback.
- Collects, monitors, and analyzes candidate academic and evaluative assessment data.
- Works independently and as part of a team to analyze, design, create, and implement appropriate instructional practices and content to improve teacher performance.
- Works with teachers individually, in collaborative teams, and/or with departments, providing practical support on a range of instructional strategies and best practices.
- Works closely with curriculum consultants, administrators, teachers, partner district representatives, mentors, coaches, and District content leads to ensure candidate growth and success.
- Conducts regular meetings with classroom teachers to examine student work and monitors progress in order to support teacher reflection and action.
- Reviews a variety of student assessment data to ensure continuous improvement in measurable student performance and achievement. Assists teachers in disaggregating and analyzing district and state assessment data to help guide instructional decisions.
- Uses assessment data to assist teachers and administrators with placement of students in appropriate instructional or intervention groups.
- Supports EPP recruitment, admissions, and completion activities (e.g. participating in information sessions, etc.).

- Participates in clinical mentor selection/matching and supports clinical mentorship activities in and out of District.
- Provides clinical supervision to EPP mentors and candidates per State and program standards.
- Maintains working knowledge of candidate content area(s), programs, State standards, etc. in alignment with the EPP's specialty area program(s) (SAP).
- Establishes positive rapport with administration and staff and encourages learning, growth and achievement by modeling life-long learning for participants.
- May operate a motor vehicle to conduct various work activities.
- Complies with applicable district, state, and federal codes, laws, rules, regulations, standards, policies and procedures.
- Adheres to the Teacher Code of Ethics as defined by Tennessee Law and Code of Professional Conduct as defined by Board Policy 5.6011.
- Acts in a professional, respectful, and welcoming manner at all times.
- Creates a customer-focused climate and provides quality services and support to schools, community, businesses, Superintendent of Schools, Board of Education, and other stakeholders.
- Works collaboratively with all stakeholders.
- Follows established procedures to ensure assigned areas are safe.
- Maintains confidentiality.
- Performs other related duties as assigned.

Education, Experience, and Qualifications

Salary is based on a combination of relevant education and experience.

- Bachelor's Degree in Education, Educational Leadership, or a related field.
- Valid Tennessee teaching license;
- Three (3) years effective teaching experience;
- Experience facilitating professional learning;
- Or any equivalent combination of education, training, and experience that provides the required knowledge, skills, and abilities for this job.
- Must maintain a valid state issued driver's license.
- Familiarity with SAP content area(s) preferred.

Knowledge, Skills, and Abilities

- Ability to plan, organize, solve problems, make sound decisions, and manage time effectively in a fast-paced and dynamic environment.
- Ability to communicate effectively, both verbally and in writing.
- Knowledge of instructional best practices and effective strategies.

Physical Requirements

In compliance with the Americans with Disabilities Act, the Board of Education will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.

ACTIVITY	FREQUENCY				ACTIVITY	FREQUENCY			
	N	O	F	C		N	O	F	C
Lift/Carry:					Twist	☐	☐	☐	☒
10 lbs or less	☐	☐	☐	☒	Turn (pivot)	☐	☐	☐	☒
11-20 lbs	☐	☐	☐	☒	Climb	☐	☒	☐	☐
21-50 lbs	☐	☐	☒	☐	Crawl	☐	☒	☐	☐
51-100 lbs	☐	☒	☐	☐	Reach Above	☐	☐	☐	☒
100+ lbs	☒	☐	☐	☐	Reach Outward	☐	☐	☐	☒
Push/Pull:					Fine Motor Tasks	☐	☐	☐	☒
10 lbs or less	☐	☐	☐	☒	Stand	☐	☐	☒	☐
11-20 lbs	☐	☐	☐	☒	Walk	☐	☐	☒	☐
21-50 lbs	☐	☐	☒	☐	Sit	☐	☐	☐	☒
51-100 lbs	☐	☒	☐	☐	Bend	☐	☐	☐	☒
100+ lbs	☒	☐	☐	☐	Squat	☐	☐	☒	☐
					Kneel	☐	☒	☐	☐
Drive	☐	☐	☒	☐					
Automatic	☐	☐	☐	☐	Type/Keyboard	☐	☐	☐	☒
Standard	☐	☐	☐	☐	Other:	☐	☐	☐	☐
Key:									
N = Never (0% of time); **O** = Occasional (1-33% of time); **F** = Frequent (34-66% of time); **C** = Constant (67-100% of time).									

Hamilton County Schools is an Equal Opportunity employer and actively seeks to recruit and retain a diverse workforce that reflects the diversity of our student population and community. HCS does not discriminate on the basis of race, creed, color, sexual orientation, gender identity, religion, age, national origin, genetic information, individuals with disabilities, or veteran status with regard only for qualifications for the positions involved.

HAMILTON COUNTY SCHOOLS

Job Description

Job Title:	**Exceptional Education Individual Student Support Nurse**		
Reports to:	**Principal/Exceptional Education Supervisor**		
Job Class:	**E224**	FLSA Status:	**Non-Exempt**
Pay Grade:	**F (1014)**	Position Certified:	**No**

Hamilton County Schools has the right to revise this job description at any time and it does not in any way represent a contract of employment.

Purpose of Job

The purpose of this classification is to provide individualized skilled nursing care and academic support to a student with complex medical, physical, and educational needs. The role integrates responsibilities of an Exceptional Education Ancillary Attendant and a Licensed Practical Nurse (LPN), ensuring continuous health monitoring, physical assistance, and instructional support throughout the school day. The incumbent collaborates with school health and instructional teams to implement and maintain the student's Individualized Education Program (IEP), Individualized Health Plan (IHP), and Emergency Action Plan (EAP), promoting safety, well-being, and academic success.

Primary Job Duties and Responsibilities

Since every duty associated with this position may not be described herein, employees may be required to perform duties not specifically spelled out but may be considered incidental in the performance of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the duties herein described.

- Provide routine and emergency nursing care within LPN licensure, training, and district policies.
- Administer prescribed medications and perform specialized nursing procedures (e.g., tube feeding, suctioning, catheterization, respiratory support) in accordance with the student's IHP.
- Monitor the student's medical status, including vital signs, seizure activity, respiratory function, gastrointestinal tolerance, and overall health stability.
- Recognize and respond to changes in the student's condition, following emergency protocols and communicating immediately with the supervising RN and administrators.
- Maintain accurate documentation of medications, procedures, and daily health observations using approved medical records systems.
- Implement infection control, safety precautions, and proper equipment sanitation.
- Assist with toileting, feeding, mobility, lifting, positioning, and other health-related physical care tasks.
- Ensure all medical supplies, equipment, and emergency materials accompany the student throughout the building and on field trips.
- Work under the direction and supervision of the School Nurse for any training, delegable skills, and health plan updates.
- Assist the student in accessing instruction aligned to their IEP.
- Prepare, modify, and use instructional materials and assistive technology to support the student's learning needs.

- Provide direct academic prompting, re-teaching, guided practice, and task analysis to support engagement and skill development.
- Implement accommodations and specialized instructional strategies.
- Collect academic and behavioral data for progress monitoring.
- Assist the teacher during instruction, small groups, and hands-on activities.
- Provide mobility support, including wheelchair transfers, standers, and gait trainers.
- Perform safe lifting, positioning, and physical assistance consistent with the student's medical and physical needs.
- Ensure adaptive equipment is set up and functioning properly.
- Use proactive, positive behavior strategies to support regulation and engagement.
- Maintain required training in non-violent crisis intervention methods.
- Model and reinforce appropriate communication and social skills.
- Work closely with the School Nurse, School Nurse Manager, teachers, related service providers, and administrators.
- Participate in IEP meetings, health plan reviews, staff trainings, and required meetings.
- Maintain professional, ongoing communication with teachers and, as directed, parents.
- Maintain confidentiality of all student medical and educational records.
- Complies with applicable district, state, and federal codes, laws, rules, regulations, standards, policies and procedures.
- Adheres to the Teacher Code of Ethics as defined by Tennessee Law.
- Acts in a professional, respectful, and welcoming manner at all times.
- Creates a customer-focused climate and provides quality services and support to schools, community, businesses, Superintendent of Schools, Board of Education, and other stakeholders.
- Works collaboratively with all stakeholders.
- Follows established procedures to ensure assigned areas are safe.
- Maintains confidentiality.
- Attends work and arrives to work on time.
- Performs other related duties as assigned.

Education, Experience, and Qualifications

Salary is based on a combination of relevant education and experience.

- High School diploma or equivalent.
- Valid Tennessee Licensed Practical Nurse (LPN).
- Supplemented by three (3) years previous experience and/or training involving nursing, preferably in a school, pediatric, adolescent, or public health environment.
- Or any equivalent combination of education, training, and experience that provides the required knowledge, skills, and abilities for this job.
- Must possess one of the following before reporting to work: (1) 48 semester hours or 72 quarter hours; (2) An Associate's degree or higher; (3) passing score on PRAXIS for Parapro Exam.
- Must possess and maintain valid CPR and First Aid certification.
- Experience providing nursing care for children or students with disabilities preferred.
- Experience in a school, pediatric, or developmental disability settings preferred.

Knowledge, Skills, and Abilities

- Ability to perform skilled nursing procedures safely and according to training.
- Ability to implement specialized instructional strategies and accommodations.
- Ability to lift, transfer, and physically support students safely.
- Skilled in monitoring, documenting, and communication changes in medical status.
- Demonstrate excellent verbal and written communication skills to deal effectively with students, educators, employees, community members, parents, and other stakeholders.

Physical Requirements

In compliance with the Americans with Disabilities Act, the Board of Education will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.

ACTIVITY	FREQUENCY				ACTIVITY	FREQUENCY			
	N	O	F	C		N	O	F	C
Lift/Carry:					Twist	☐	☐	☐	☒
10 lbs or less	☐	☐	☐	☒	Turn (pivot)	☐	☐	☐	☒
11-20 lbs	☐	☐	☐	☒	Climb	☐	☒	☐	☐
21-50 lbs	☐	☐	☒	☐	Crawl	☐	☒	☐	☐
51-100 lbs	☐	☐	☒	☐	Reach Above	☐	☐	☐	☒
100+ lbs	☐	☐	☒	☐	Reach Outward	☐	☐	☐	☒
Push/Pull:					Fine Motor Tasks	☐	☐	☐	☒
10 lbs or less	☐	☐	☐	☒	Stand	☐	☐	☐	☒
11-20 lbs	☐	☐	☐	☒	Walk	☐	☐	☐	☒
21-50 lbs	☐	☐	☒	☐	Sit	☐	☒	☐	☐
51-100 lbs	☐	☐	☒	☐	Bend	☐	☐	☐	☒
100+ lbs	☐	☐	☒	☐	Squat	☐	☐	☒	☐
					Kneel	☐	☐	☒	☐
Drive	☒	☐	☐	☐					
Automatic	☐	☐	☐	☐	Type/Keyboard	☐	☐	☒	☐
Standard	☐	☐	☐	☐	Other:	☐	☐	☐	☐
Key:									
N = Never (0% of time); **O** = Occasional (1-33% of time); **F** = Frequent (34-66% of time); **C** = Constant (67-100% of time).									

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HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

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

From: Dr. Zac Brown, Chief Talent Officer
Mary Ellen Heuton, Chief Financial Officer
Penny M. Murray, Executive Director

Date: January 15, 2026

Subject: Revised Retiree Health Benefit Plan and Summary Description

Board Agenda Category:

- ☐ Consent Agenda
- ☑ Action Item
- ☐ Reports and Information

As a follow-up to the presentation at the Board policy meeting on December 8, attached for the Board's review is the revised Retiree Health Benefit Plan and Summary Plan Description, proposed to be effective July 1, 2026.

For ease of review and transparency, items shown in red within the attached documents represent additions made since the last Board review.

We respectfully request approval.

Enclosures:

- Retiree Health Benefit Guide and Summary Plan Description

Opportunity 2030 Commitment Connection

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

HAMILTON COUNTY DEPARTMENT OF EDUCATION

RETIREE HEALTH BENEFIT PLAN

AND

SUMMARY PLAN DESCRIPTION

Effective July 1, 2026

This Plan Document together with the applicable certificates of insurance, insurance booklets, benefit summaries and/or group insurance contracts constitute the written plan document and summary plan description for the component employee benefits plan offered under the Hamilton County Department of Education Retiree Health Benefit Plan

This plan is available to the following categories of employees:

HCDE Retirees

Effective Retirement Date: July 1, 2026

Document Approved: January 15, 2026

Original Date: November 01, 2001

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Section 2: Coverage Continuation 5
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Section 10: COBRA and Retiree Health Coverage 14
Section 11: Surviving Spouse Rights 15
Section 12: Plan Administrator Contact 16
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Section 1: Eligibility

To be eligible for the Hamilton County Department of Education (HCDE) Retiree Health Plan, you must meet all the requirements outlined in this section. Eligibility is based on a combination of service, age, retirement status, and prior coverage through HCDE.

**Please note that TCRS service includes service time worked and DOES NOT include sick leave accruals. While the accruals are allowable for TCRS pension calculations, that time does not count toward credit when it comes to eligibility for medical coverage with HCDE upon retirement.

You are eligible to enroll in retiree health coverage if you meet **one** of the following conditions:

Certified Retirees:

- Worked for HCDE for at least twenty (20) years, the last five of which must be consecutive.
- For TCRS Legacy plans, the retiree must be at least age 55 or have at least 30 years of service with TCRS.
- For TCRS Hybrid plans, the retiree must be at least age 60 or have 30 years of service with TCRS.

Classified Retirees:

- Worked for HCDE for at least fifteen (15) years, the last five of which must be consecutive.
- For TCRS Legacy plans, the retiree must be at least age 55 or have at least 30 years of service with TCRS.
- For TCRS Hybrid plans, the retiree must be at least age 60, or have at least 30 years of service with TCRS

In addition to the criteria above, you must have been enrolled in **HCDE-sponsored health coverage** for a minimum of **five (5) consecutive years** immediately before retirement. If there is a break in coverage prior to retirement, you are not eligible to enroll in the Retiree Health Plan.

Retirees who are approved for disability retirement through TCRS but who do not meet the 20 year certified or 15 year classified eligibility requirement, may remain on the HCDE health plan until the retiree becomes eligible for other coverages. Employees who retire early due to disability may continue their current coverage; however, to maintain long-term eligibility, they are required to actively apply for Medicare Disability and/or Medicaid coverage as soon as they become eligible and must transition to those programs immediately upon approval. Failure to do so may result in loss of

eligibility for continued coverage under the district's plan.

To maintain eligibility, your retirement must result in **immediate and continuous enrollment** in retiree health coverage without a lapse. If you choose not to enroll in the plan at the time of retirement, you will **permanently forfeit** your right to enroll at a later date.

Eligible Dependents may be covered under the plan if they were enrolled as dependents on your active employee coverage **immediately before your retirement date**. Eligible Dependents include:

- Your **legally married spouse**
- Your **children** up to **age 26**, regardless of student status or marital status
- Your **unmarried children over age 26** who have a **qualifying disability** and meet all other dependent eligibility criteria at the time of retirement

To remain eligible for continued coverage under the retiree health plan, dependents must meet **both** of the following conditions:

1. **Continuous Coverage for One Year Prior to Retirement**
   The dependent must have been enrolled in the employee's active HCS medical plan for a **minimum of 12 consecutive months immediately preceding the employee's retirement date**.
2. **Enrolled at the Time of Retirement**
   The dependent must remain covered on the plan **on the employee's actual retirement date**. Dependents who are not actively enrolled at retirement are **not eligible** to continue coverage under the retiree plan.

Dependent eligibility must be verified at the time of retirement. If a dependent is not enrolled at the time you retire, they **cannot be added** later ~~unless certain life events apply (see Section 5: Mid-Year Changes)~~. Dependents must continue to meet all eligibility criteria throughout the time they are covered under the plan. Dependents who do not meet requirements will not be eligible for continuation of coverage through the retiree health plan.

Grandfathered Retiree Coverage

Employees who retire prior **to July 1, 2026,** will be grandfathered under the previous retiree medical coverage provisions. This means they may remain eligible for HCDE-sponsored retiree health coverage under the prior service requirements, which allowed continuation of coverage with fewer years of service than are required under current eligibility guidelines.

To maintain eligibility under the grandfathered provision:

- The employee must **officially retire no later than on or before June 30, 2026.**

- The retiree and their enrolled spouse must **not be offered other group health coverage** through any other employer that does not meet allowable spousal requirements. If offered employer-sponsored coverage that does not meet the spousal eligibility requirements, eligibility for the HCDE retiree health plan will end.
- All retirees, regardless of grandfathered status, are subject to the current plan's tiered structure and annual actuarial review, which determines premiums and contribution rates. These rates are subject to change each plan year.

Employees considering retirement are strongly encouraged to review their retirement date and post-retirement health coverage eligibility to determine whether they qualify under the grandfathered provision. Once the grandfather window closes, all new retirees will be held to the updated eligibility criteria in effect at the time of their retirement.

Section 2: Coverage Continuation

The Retiree Health Plan allows eligible retirees and their enrolled dependents to continue medical coverage after active employment ends. However, coverage is not automatic and must be properly elected during retirement.

To ensure uninterrupted coverage, you must submit a completed **retirement and enrollment form** before your final working day. Coverage under the Retiree Health Plan will begin on the **first day of the month following your retirement date**, as long as all requirements are met.

Coverage under the Retiree Health Plan will **mirror the medical plan** offered to active employees. This includes access to the same network providers, plan options, and cost-sharing arrangements. Retirees do not have access to a separate retiree-only plan.

There can be **no break in coverage** between your active employee plan and your retiree coverage. If coverage lapses — even for one month — you will be considered ineligible for retiree health benefits. In other words, you must retire directly into this plan without a gap in enrollment.

If the retiree **gains access to group health coverage** through re-employment, such as coverage offered by another employer or through a spouse's employment, the retiree must elect the coverage and HCDE health benefits will become secondary. However, if coverage is cancelled for any reason, the decision is permanent and cannot be reversed.

Coverage for any **Eligible Dependent** also continues without interruption, provided the dependent was enrolled under your active plan and continues to meet eligibility requirements.

Once coverage begins, retirees and dependents will remain in the plan until a disqualifying event occurs (see Section 9: Termination of Coverage).

It is important to note that electing retiree coverage is a **one-time opportunity**. If you decline coverage at the time of retirement, you will not be allowed to enroll at a later date — even during future Open Enrollment periods.

Section 3: Enrollment

Enrollment in the HCDE Retiree Health Plan requires formal action and does not occur automatically upon retirement. Eligible employees must complete and submit all retirement and benefit election forms prior to their final day of active employment. These forms must indicate the decision to continue medical coverage under the Retiree Health Plan. Failure to submit accurate and timely forms will result in ineligibility for retiree health benefits.

Coverage under the plan begins on the first day of the month following the employee's retirement date, provided that enrollment is completed without a lapse. There must be no break between the end of active employee coverage and the start of retiree coverage. A lapse in enrollment, even for a single month, renders the retiree ineligible for participation in the plan.

The election to enroll in retiree health coverage is a one-time opportunity. If coverage is declined at the time of retirement, the retiree will not be permitted to enroll at a later date. This restriction applies to all future plan years, including during Open Enrollment periods.

Retirees who wish to continue dependent coverage must include those dependents on the enrollment forms submitted at retirement. Only dependents who meet eligibility requirements and were enrolled on the retiree's active coverage for at least one year immediately prior to retirement may continue under the plan. Dependents who are not listed at the time of retirement may not be added later.

Late enrollment, re-enrollment, or appeals based on administrative error or change of circumstance are not permitted. All enrollment actions must be completed prior to the retiree's final day of employment.

Section 4: Open Enrollment

The HCDE Retiree Health Plan includes an annual Open Enrollment period each year. During this time, retirees may review plan offerings and, where permitted, make changes to their coverage for the upcoming plan year.

Retirees may use Open Enrollment to switch between available medical plan options offered through HCDE or to remove currently covered dependents. Changes must comply with current plan eligibility rules and will take effect on January 1 of the following calendar year. If no changes are submitted during the Open Enrollment window, the retiree's existing coverage will continue unchanged.

Open Enrollment does not allow retirees to add new dependents. Additionally, retirees who declined coverage at the time of retirement remain permanently ineligible to enroll and may not use Open Enrollment to initiate coverage. Retirees may not return ~~switch to or~~ from Medicare-related coverage under the HCDE plan, as participation in the Retiree Health Plan ends when an enrollee becomes eligible for Medicare.

The Health Plans include a provision that a spouse may only be covered as a dependent if the spouse does not have access to medical coverage through an employer, or if the spouse has a high deductible health plan in accordance with the IRS family deductible guidelines for the plan year. Retirees will be required to complete a Spousal Coverage Affidavit each year at open enrollment.

HCDE will provide formal notice of the Open Enrollment period each year. The notice will include information on available plan options, premium updates, and instructions for submitting changes. All Open Enrollment transactions must be completed by the stated deadline. Late submissions will not be accepted.

Questions about plan options or coverage rules during Open Enrollment should be directed to the Plan Administrator prior to the deadline.

Section 5: Mid-Year Changes

After retirement, changes to coverage under the HCDE Retiree Health Plan are permitted only in limited circumstances. Once a retiree has made initial elections at the time of retirement, those elections remain in effect unless a **Qualifying Life Event** occurs, and there is a need to drop dependents.

A Qualifying Life Event is a specific change in personal or family status that allows a retiree to make changes to their existing coverage outside of the annual Open Enrollment period. Each of these events must have a direct effect on the retiree's eligibility or the eligibility of a covered dependent under the plan.

When a Qualifying Life Event occurs, the retiree has a window of **thirty (30) calendar days** from the date of the event to notify the Plan Administrator and submit all required documentation. Changes requested outside of this timeframe will not be accepted. Any changes made must be consistent with the nature of the qualifying event. For example, if a retiree's spouse becomes eligible for other health coverage, then the spouse will be removed from the retiree's plan.

The ability to make mid-year changes is restricted and closely monitored to ensure consistency with established eligibility standards. Retirees are encouraged to report changes promptly to avoid unintended loss of coverage or denial of benefits.

Section 6: Dependent Coverage

Dependent coverage under the HCDE Retiree Health Plan is available to eligible family members who were actively covered on the retiree's employee health plan for a minimum of 12 consecutive months immediately ~~prior~~ preceding ~~to~~ the date of retirement. Dependents must meet the plan's eligibility requirements and must be included on the retiree's benefit election forms at the time of retirement.

To continue coverage for spouse, a spousal affidavit must be completed and submitted affirming that the spouse does not have access to any other employer sponsored health benefit plan.

The following categories of individuals qualify as Eligible Dependents under the plan: (1) the retiree's legally married spouse; (2) the retiree's children up to age 26, regardless of student or marital status; and (3) the retiree's unmarried children over age 26 who have a permanent and qualifying disability, provided that disability existed prior to the child reaching age 26 and is medically certified according to plan standards.

Dependent status must be verified according to the procedures established by the Plan Administrator. Failure to provide required documentation will result in denial of dependent coverage. A dependent who is not enrolled at the time of retirement cannot be added at a later date.

If a dependent loses eligibility—due to age and Medicare eligibility, change in marital status, loss of disability status, or divorce from the retiree—that individual must be removed from coverage. Failure to report changes in dependent eligibility may result in retroactive cancellation of coverage and recovery of claims paid.

The Retiree Health Plan does not offer extended or discretionary dependent coverage beyond what is defined in this section. All dependents must continue to meet eligibility standards for the duration of their coverage.

Section 7: Medicare Transition

Participation in the HCDE Retiree Health Plan is limited to individuals who are not yet eligible for Medicare. When a retiree becomes eligible for Medicare—either due to age or qualifying disability—their coverage under the Retiree Health Plan will end. This rule applies regardless of whether the individual chooses to enroll in Medicare or delay enrollment. Eligibility for Medicare alone is sufficient to disqualify the retiree from continued participation in the HCDE plan.

~~The standard Medicare eligibility age is sixty-five (65).~~ ~~However~~, ~~In~~dividuals may qualify for Medicare based on the federal age requirement or earlier due to permanent disability or specific medical conditions as determined by the Social Security Administration. Retirees are responsible for understanding their Medicare eligibility timeline, as HCDE will automatically terminate HCDE retiree and/or dependent coverage at the onset of Medicare eligibility ~~at age 65~~.

Dependents who are enrolled on the retiree's plan may continue coverage even if the retiree becomes Medicare-eligible and exits the plan. The dependent must continue to meet eligibility requirements and may remain on the Retiree Health Plan until they themselves become eligible for Medicare or experience another disqualifying event. However, once a dependent becomes eligible for Medicare, their coverage under the HCDE plan will end, regardless of whether the retiree remains eligible.

If both the retiree and all enrolled dependents become Medicare-eligible, the family's participation in the HCDE plan ends in full. Retirees and dependents are advised to begin Medicare enrollment in a timely manner to avoid any disruption in healthcare coverage.

HCDE does not offer Medicare supplement plans or Medicare Advantage options. Once Medicare eligibility begins, responsibility for obtaining healthcare coverage shifts to the retiree or dependent, and HCDE-sponsored coverage ceases.

Section 8: Premiums and Payment

Premiums for the HCDE Retiree Health Plan are set each year based on actuarial calculations. Retirees who meet the state requirement age with employee only coverage who either as a certified employee have 20 years of service or classified employee with 15 years of service, pay the current premiums that active employees pay. All other plan tiers are tiered and priced according to actuarial rates reviewed each plan year.

Retirees who are considered to be grandfathered, meaning retired prior to July 1, 2026, are subject to the following premium amounts since they are still allowed to continue coverage with fewer years of service. Grandfathered retiree rates for these retirees include:

- Certified 10-19 years: individual health coverage ~~for~~ by paying 40% of the actual cost to the Board.
- Certified 5 – 9 years or Classified 5-14 – individual health coverage by paying the ~~at~~ full actual cost to the Board.
- Dependent coverage may be continued by paying the full actual cost to the Board.
- The above rates are subject to change each year based on the premiums charged.

Retirees are responsible for paying the full monthly premium associated with their selected coverage level. Payment must be received in full each month by the established due date. Retirees will be provided with billing information and payment instructions prior to the start of coverage.

Failure to pay premiums by the due date will result in the termination of coverage. There is no grace period beyond the administrative timeline set by the Plan Administrator, and coverage cannot be reinstated once terminated for non-payment. Retirees who lose coverage due to non-payment may not re-enroll in the plan under any circumstances.

Retirees are responsible for submitting payments directly to the designated billing address or online system, as specified in the plan materials. It is the retiree's responsibility to ensure that payment is accurate, timely, and correctly applied.

Premium notices will be sent in advance of the due date. However, non-receipt of a premium notice does not excuse late or missed payments. Retirees are encouraged to maintain accurate contact information and to monitor their account regularly to avoid disruption in coverage.

Section 9: Termination of Coverage

Coverage under the HCDE Retiree Health Plan will end when a retiree or covered dependent experiences a disqualifying event. Termination may result from Medicare eligibility, failure to pay premiums, voluntary disenrollment, or other changes in eligibility status.

When a retiree becomes eligible for Medicare, their participation in the HCDE plan will end the month prior to Medicare eligibility. ~~automatically at the end of the month in which Medicare eligibility begins~~. This rule applies regardless of whether the retiree has enrolled in Medicare or intends to delay enrollment. Coverage may not be extended beyond the date of Medicare eligibility.

Failure to pay premiums in full and on time will result in the immediate cancellation of coverage. There is no reinstatement option for retirees whose coverage has been terminated due to non-payment. Premiums are due each month and must be received by the due date specified by the Plan Administrator.

Coverage will also end if the retiree voluntarily cancels participation in the plan. Once coverage has been voluntarily terminated, the retiree may not re-enroll at a later date, regardless of circumstance.

If a covered dependent becomes ~~ineligible due to age,~~ Medicare eligibil~~ity~~, or experiences another disqualifying event~~s~~, their coverage ~~must~~ will be terminated. The retiree is responsible for notifying the Plan Administrator of any change in dependent eligibility status within thirty (30) days of the event.

Retirees are responsible for maintaining accurate and up-to-date contact and eligibility information. Failure to provide timely updates may result in the retroactive cancellation of benefits and the recovery of claims paid in error.

Section 10: COBRA and Retiree Health Coverage

In accordance with federal law, retirement is considered a qualifying event under COBRA that results in the loss of active employee health coverage. Therefore, all retiring employees will be provided with a COBRA continuation notice at the time of separation, regardless of their eligibility for retiree health coverage.

If a retiree elects to continue identical coverage under the HCDE retiree health plan, such coverage will satisfy the COBRA continuation requirement for the initial eighteen (18) months following retirement. Retiree coverage will then continue under the terms of the Board-approved retiree plan as the retiree remains eligible.

If a retiree is ineligible for or declines participation in the retiree health plan or if the terms of the retiree's health plan are not identical to current employee coverage, they remain eligible to elect COBRA continuation coverage for up to eighteen (18) months at their own expense, consistent with federal COBRA regulations.

Questions about COBRA eligibility or continuation of rights should be directed to the Plan Administrator upon notification of a qualifying event.

Section 11: Surviving Spouse Rights

In the event of a retiree's death, a surviving spouse who was enrolled under the HCDE Retiree Health Plan at the time of the retiree's death may continue coverage, provided all eligibility and payment requirements are met. Continuation of coverage is not automatic and must be formally elected within the timeframe established by the Plan Administrator. The surviving spouse must have been covered as a dependent under the retiree's plan on the date of the retiree's death. If the spouse was not enrolled at the time of death, no continuation rights are available under this section. Eligible surviving spouses may continue coverage until they become eligible for Medicare, qualify for eligibility for employer sponsored coverage or until they voluntarily terminate coverage.

If a surviving spouse becomes eligible for Medicare, coverage under the HCDE plan will end on the last day of the month prior to Medicare eligibility. At that time, the individual is responsible for securing coverage through Medicare or other sources.

Requests for continuation of coverage by a surviving spouse must be submitted within thirty (30) days of the retiree's death. The required documentation must be completed and submitted within the same period. Failure to act within this timeframe may result in the loss of continuation of rights.

Premiums for continued coverage must be paid in full and on time. Failure to pay monthly premiums will result in cancellation of coverage, and re-enrollment will not be permitted. The surviving spouse is responsible for maintaining timely payment and for ensuring that accurate contact information is on file.

Section 12: Plan Administrator Contact

The HCDE Retiree Health Plan is administered by a designated Plan Administrator responsible for enrollment, eligibility verification, premium billing, and ongoing plan support. Retirees are encouraged to contact the Plan Administrator with questions regarding coverage, eligibility, payment, or changes in personal circumstances.

All requests for enrollment, termination, qualifying life events, or coverage changes must be submitted in writing to the Plan Administrator. Contact methods may include physical mail, email, or secure online portals, as made available by the district or third-party administrator.

Retirees must notify the Plan Administrator within thirty (30) days of any change in status that affects plan eligibility, such as Medicare enrollment, death of a dependent, divorce, or address changes. Failure to report these changes may result in delayed processing, denial of claims, or termination of coverage.

Premium payments must be submitted according to the instructions provided by the Plan Administrator. Non-receipt of a billing notice does not waive the retiree's obligation to pay premiums on time.

Contact information for the Plan Administrator, including address, phone number, and email, is provided in the plan materials and should be kept readily available. Retirees are advised to retain copies of all submitted forms and correspondence for their records.

Section 13: Final Notes and Disclaimers

The HCDE Retiree Health Plan is offered as a benefit to eligible retirees and their enrolled dependents. Participation in the plan is voluntary and subject to the terms, conditions, and administrative procedures established by the Hamilton County Department of Education. This guide provides a summary of those terms and is intended to assist retirees in understanding their options and responsibilities under the plan.

The information provided in this guide is current as of the publication date and reflects the plan rules in effect for the upcoming calendar year. However, HCDE reserves the right to modify, amend, or discontinue any part of the Retiree Health Plan at its sole discretion. Changes may occur due to updates in medical plan offerings, cost structures, eligibility requirements, or other factors determined by the district or its governing authorities.

This guide does not constitute a contract and is not intended to guarantee coverage or benefit levels beyond those described in the official plan documents provided by the medical insurance carriers. In the event of any discrepancy between this guide and the insurance carrier's documents, the carrier's materials will govern.

Retirees are responsible for reviewing all correspondence from the Plan Administrator and insurance carrier and for complying with any stated deadlines, forms, or documentation requests. The district is not responsible for lapses in coverage due to missed deadlines or incomplete submissions.

Questions about plan terms, eligibility, or required actions should be directed to the Plan Administrator. Retirees are encouraged to maintain accurate records, adhere to published timelines, and request clarification when needed to ensure uninterrupted access to benefits.

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

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

From: Dr Robert Sharpe, Chief Operations Officer

Date: January 15, 2026

Subject: Approval of lease options for Head Start sites

Board Agenda Category:

- ☐ Consent Agenda
- ☑ Action Item
- ☐ Reports and Information

I recommend that the Board approve exercising the one-year lease extension options for the Head Start sites at Avondale, Cedar Hill, and Daisy leased from the City of Chattanooga. The original lease agreements were approved two years ago and renewed in January 2025.

Opportunity 2030 Commitment Connection

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

RESOLUTION NO. 32689

A RESOLUTION AUTHORIZING THE ADMINISTRATOR FOR THE DEPARTMENT OF ECONOMIC DEVELOPMENT TO ENTER INTO A SECOND AGREEMENT TO EXERCISE OPTION TO RENEW WITH HAMILTON COUNTY, TENNESSEE, BOARD OF EDUCATION, IN SUBSTANTIALLY THE FORM ATTACHED, FOR THE USE OF TAX PARCEL NOS. 136L-M-002, 136L-M-005, AND 136L-M-006, FOR THE CONTINUED OPERATION OF THE AVONDALE HEAD START/EARLY HEAD START PROGRAM AT 2302 OCOEE STREET, FOR AN ADDITIONAL TERM OF ONE (1) YEAR THROUGH DECEMBER 31, 2026, FOR THE AMOUNT OF ONE DOLLAR ($1.00).

BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF CHATTANOOGA, TENNESSEE, it is hereby authorizing the Administrator for the Department of Economic Development to enter into a Second Agreement to Exercise Option to Renew with Hamilton County, Tennessee, Board of Education, in substantially the form attached, for the use of Tax Parcel Nos. 136L-M-002, 136L-M-005, and 136L-M-006, for the continued operation of the Avondale Head Start/Early Head Start Program at 2302 Ocoee Street, for an additional term of one (1) year through December 31, 2026, for the amount of $1.00.

ADOPTED: November 4, 2025

/mem

RESOLUTION NO. 32690

A RESOLUTION AUTHORIZING THE ADMINISTRATOR FOR THE DEPARTMENT OF ECONOMIC DEVELOPMENT TO ENTER INTO A SECOND AGREEMENT TO EXERCISE OPTION TO RENEW WITH THE HAMILTON COUNTY, TENNESSEE, BOARD OF EDUCATION, IN SUBSTANTIALLY THE FORM ATTACHED, FOR USE OF A PORTION OF TAX PARCEL NO. 168I-C-032, FOR THE CONTINUED OPERATION OF THE CEDAR HILL HEAD START/EARLY HEAD START PROGRAM AT 4701 DIVINE AVENUE, FOR AN ADDITIONAL TERM OF ONE (1) YEAR THROUGH DECEMBER 31, 2026, FOR THE AMOUNT OF ONE DOLLAR ($1.00).

BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF CHATTANOOGA, TENNESSEE, it is hereby authorizing the Administrator for the Department of Economic Development to enter into a Second Agreement to Exercise Option to Renew with the Hamilton County, Tennessee, Board of Education, in substantially the form attached, for use of a portion of Tax Parcel No. 168I-C-032, for the continued operation of the Cedar Hill Head Start/Early Head Start Program at 4701 Divine Avenue, for an additional term of one (1) year through December 31, 2026, for the amount of $1.00.

ADOPTED: November 4, 2025

/mem

RESOLUTION NO. 32691

A RESOLUTION AUTHORIZING THE ADMINISTRATOR FOR THE DEPARTMENT OF ECONOMIC DEVELOPMENT TO ENTER INTO A SECOND AGREEMENT TO EXERCISE OPTION TO RENEW WITH HAMILTON COUNTY, TENNESSEE, BOARD OF EDUCATION, IN SUBSTANTIALLY THE FORM ATTACHED, FOR USE OF A PORTION OF TAX PARCEL NO. 066M-D-014, FOR THE CONTINUED OPERATION OF THE DAISY HEAD START/EARLY HEAD START PROGRAM AT 9517 W. RIDGE TRAIL ROAD IN SODDY DAISY, TN, FOR AN ADDITIONAL TERM OF ONE (1) YEAR THROUGH DECEMBER 31, 2026, FOR THE AMOUNT OF ONE DOLLAR ($1.00).

BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF CHATTANOOGA, TENNESSEE, it is hereby authorizing the Administrator for the Department of Economic Development to enter into a Second Agreement to Exercise Option to Renew with Hamilton County, Tennessee, Board of Education, in substantially the form attached, for use of a portion of Tax Parcel No. 066M-D-014, for the continued operation of the Daisy Head Start/Early Head Start Program at 9517 W. Ridge Trail Road in Soddy Daisy, TN, for an additional term of one (1) year through December 31, 2026, for the amount of $1.00.

ADOPTED: November 4, 2025

/mem

SECOND AGREEMENT TO EXERCISE OPTION TO RENEW

Agreement Title: Lease Agreement

Effective Date: January 1, 2024

Initial Expiration Date: December 31, 2024

Number of Previously Exercised Options: One

Tax Map Number: 136L-M-002, 136L-M-005 and 136L-M-006

Property Address: 2302 Ocoee Street, Chattanooga, TN 37406

Lessor: Hamilton County, Tennessee, Board of Education

Lessee: City of Chattanooga

Initial Term: One Year

Term Renewal Option: One Year

Term Renewal Expiration: December 31, 2026

By written mutual agreement of the above-named Lessor and Lessee, the option to extend the original term of the Agreement is exercised. With the option to extend the term being exercised, the original Agreement of January 1, 2024, is hereby extended for One (1) year to the date of December 31, 2026. There remains one (1) option to extend the terms of the original Agreement of January 1, 2024. All terms and conditions of the original Agreement of January 1, 2024, and any subsequent Amendments shall remain in full force and effect.

Agreed upon this the _____day of January, 2026.

LESSOR
HAMILTON COUNTY, TENNESSEE
BOARD OF EDUCATION

Dr. Justin Robertson
Superintendent

LESSEE
CITY OF CHATTANOOGA

Richard J. Beeland
Administrator, Economic Development

SECOND AGREEMENT TO EXERCISE OPTION TO RENEW

Agreement Title: Lease Agreement

Effective Date: January 1, 2024

Initial Expiration Date: December 31, 2024

Number of Previously Exercised Options: One

Tax Map Number: Portion of 168I-C-032

Property Address: 4701 Divine Avenue, Chattanooga, TN 37407

Lessor: Hamilton County, Tennessee, Board of Education

Lessee: City of Chattanooga

Initial Term: One Year

Term Renewal Option: One Year

Term Renewal Expiration: December 31, 2026

By written mutual agreement of the above-named Lessor and Lessee, the option to extend the original term of the Agreement is exercised. With the option to extend the term being exercised, the original Agreement of January 1, 2024, is hereby extended for One (1) year to the date of December 31, 2026. There remains one (1) option to extend the terms of the original Agreement of January 1, 2024. All terms and conditions of the original Agreement of January 1, 2024, and any subsequent Amendments shall remain in full force and effect.

Agreed upon this the _____ day of January, 2026.

LESSOR
HAMILTON COUNTY, TENNESSEE BOARD OF EDUCATION

Dr. Justin Robertson
Superintendent

LESSEE
CITY OF CHATTANOOGA

Richard J. Beeland
Administrator, Economic Development

SECOND AGREEMENT TO EXERCISE OPTION TO RENEW

Agreement Title: Lease Agreement

Effective Date: January 1, 2024

Initial Expiration Date: December 31, 2024

Number of Previously Exercised Options: One

Tax Map Number: Portion of 066M-D-014

Property Address: 9531 W. Ridge Trail Road, Soddy Daisy, TN 37379

Lessor: Hamilton County, Tennessee, Board of Education

Lessee: City of Chattanooga

Initial Term: One Year

Term Renewal Option: One Year

Term Renewal Expiration: December 31, 2026

By written mutual agreement of the above-named Lessor and Lessee, the option to extend the original term of the Agreement is exercised. With the option to extend the term being exercised, the original Agreement of January 1, 2024, is hereby extended for One (1) year to the date of December 31, 2026. There remains one (1) option to extend the terms of the original Agreement of January 1, 2024. All terms and conditions of the original Agreement of January 1, 2024, and any subsequent Amendments shall remain in full force and effect.

Agreed upon this the _____ day of January, 2026.

LESSOR
HAMILTON COUNTY, TENNESSEE
BOARD OF EDUCATION

Dr. Justin Robertson
Superintendent

LESSEE
CITY OF CHATTANOOGA

Richard J. Beeland
~~*Administrator*~~, *Economic Development*

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

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

From: Dr. Robert Sharpe – Chief Operating Officer
Mary Ellen Heuton, CPA – Chief Financial Officer
Justin Witt – Executive Director of Maintenance

Date: January 15, 2026

Subject: District Wide Relighting Project – Loan Agreement

Board Agenda Category:

- ☐ Consent Agenda
- ☑ Action Item
- ☐ Reports and Information

The district has identified an opportunity to utilize the Energy Efficient Schools Initiative (EESI) Loan Program, a program of the State of Tennessee to provide funding for a district-wide LED lighting project. The $6 million project will generate utility savings that will be utilized to pay for the financing. There is a multi-step process for this project; these are the steps that have been completed to date:

- An application was submitted in order to be considered for the funding from EESI in November.
- At the November Board meeting, the Energy Agreement with Excel Energy Group was approved by the Board.
- In December, the District was notified that the Energy Efficient Schools Council (EESC) unanimously voted to approve and fully fund the Hamilton County Schools' loan application.
- In the January Board meeting, the District share of funds for the project are being requested within Phase 5 of the Bond Deferred Maintenance Funds.

The information following, outlines additional details on the project and steps needed to fully execute the loan agreement and to receive a formal notice from EESC to proceed with the project:

Project Details:
District-wide LED lighting upgrade. SPED classroom will integrate RGB LED lighting.

Loan Details

Loan Amount:	$5,000,000
Energy Savings:	$537,463
Loan Term:	10 years

EESI loans are made to the County for the benefit of the School District. Before the loan agreement can be fully executed, EESI will need the following documents completed and returned to EESI staff:

1. **Loan Agreement**: The updated Loan Agreement is attached. It will need to be signed by the County Mayor, School Board Chairman, and the Director of Schools.

2. **Loan Rules**: The Energy Efficient Schools Council Loan Rules and Regulations establishes minimum requirements to award loans from the Energy Efficient Schools Council Fund to school systems for qualifying capital outlay projects, including projects where a provider has warranted predetermined energy use objectives under the criteria established by the technical advisory committee and approved by the council. This will need to be signed by the County Mayor, School Board Chairman, and the Director of Schools.

Link to Document: https://www.tn.gov/eesi/application-forms.html

3. **Borrowers Certificate (Resolution)**: Prior to execution of the Loan Agreement by the Lender, the Borrower shall have furnished to the Lender, in form and substance satisfactory to the Lender, a certificate of the Borrower certifying the resolution authorizing the Borrower to enter into this Loan Agreement.

Link to Document: https://www.tn.gov/eesi/application-forms.html

4. **Attorney's Opinion letter**. Prior to execution of the Loan Agreement by the Lender, the Borrower also shall have furnished to the Lender, in form and substance satisfactory to the Lender, an opinion of Borrower's counsel to the effect that: (1) the Borrower has been duly created and is validly existing and has full power and authority (under its Charter and By-Laws or general law, if applicable, and other applicable statutes) to enter into and carry out the terms of this Loan Agreement; (2) this Loan Agreement is duly executed and constitutes a valid and binding contract of the Borrower, enforceable in accordance with its terms except as the enforceability thereof may be limited by bankruptcy, reorganization, insolvency, moratorium, or similar laws affecting the enforcement of creditors' rights generally; (3) this Loan Agreement is not in conflict in any material way with any contracts or ordinances of the Borrower; and (4) there is no litigation materially adversely affecting this Agreement or the financial condition of the Borrower.

Link to Document: https://www.tn.gov/eesi/application-forms.html

IMPORTANT NOTE: All EESI loans require pre and post inspections by a qualified TVA engineer. Please note that any work performed prior to the TVA pre-inspection and receipt of an EESI notice to proceed *will not* be reimbursed by the loan funds.

We recommend the Board approves this agreement and authorizes the execution of the required documents.

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

Opportunity 2030 Commitment Connection

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

ENERGY EFFICIENT SCHOOLS INITIATIVE
LOAN AGREEMENT

This Loan Agreement is made and entered into as of the 8th day of December, 2025, by and between the Energy Efficient Schools Council (the "Lender") and Hamilton County, Tennessee (the "Borrower") for the benefit of Hamilton County Schools, to provide for the financing of all or a portion of a qualifying capital outlay project (the "Project").

ARTICLE 1
Definitions

Section 1.01. Defined Terms. The following words, terms and phrases shall have the following respective meanings:

"Act" means the Energy Efficient Schools Initiative (EESI) of 2008, Tennessee Code Annotated §§ 49-17-101 *et seq.*, as amended from time to time.

"Authorized Borrower Representative" means any Person from time to time authorized to act on behalf of a Borrower pursuant to the Charter, or ordinance or resolution of the governing body of such Borrower, a copy of which is filed with the Lender, to perform such act or execute such document on behalf of the Borrower pursuant to a certificate signed by the Person executing this Loan Agreement or his successor in office and giving the name and specimen signature of the Person or Persons so designated

"Borrower" means Hamilton County, Tennessee.

"Borrower Request", "Borrower Order" and "Borrower Consent" means, respectively, a written request, order or consent signed by an Authorized Borrower Representative and delivered to the Authority.

"Business Day" means any day other than (a) a Saturday or Sunday, (b) a day on which banking institutions located in the State are required or authorized by law or executive order to close, or (c) a day on which the New York Stock Exchange is closed.

"Cost" or "Cost of the Project" means the following:

(a) The cost of improving, equipping, and repairing the Project, or any combination of such purposes, and demolishing structures on the Project sites;

(b) The cost of labor, materials, machinery and equipment as payable to contractors, builders and materialmen in connection with the Project;

(c) Governmental charges levied or assessed during equipping of the Projects or upon any property acquired therefor, and premiums on insurance in connection with the Projects during construction;

(d) Fees and expenses of architects and engineers for estimates, surveys and other preliminary investigations, environmental tests, soil borings, appraisals, preparation of plans, drawings and specifications and supervision of the Project properly chargeable to the Project, as well as for the performance of all other duties of architects and engineers in relation to the construction and installation of the Project;

(e) Expenses of administration, supervision and inspection properly chargeable to the acquisition and construction of Project, including the fees of the Borrower relating to the design, construction and equipping of the Project and all other items of expense, not elsewhere specified herein, incident to the construction, installation and placing in operation of the Project; and

(f) Any other cost of the Project permitted to be financed by the Lender pursuant to the Act.

"Date of Disbursement" means the date funds are disbursed by the Lender to the Borrower, by check or wire, whether or not the Borrower receives them on that date.

"Event of Default" means any event defined in Section 6.01 hereof.

"Fund" means the energy efficient schools council fund established as a separate account in the State treasury.

"Lender" means the twelve (12) member energy efficient schools council established by the Act.

"Loan" means the loan made by the Lender to the Borrower pursuant to this Loan Agreement as described in Section 3.01 hereof.

"Loan Administrator" means initially the Division of State Government Finance, which will perform certain functions in administering this Loan as requested from time to time by the Lender, or any successor Loan Administrator.

"Loan Agreement" means this Loan Agreement as it now exists and as it may thereafter be amended.

"Loan Repayments" means the payments on account of principal of and interest on the Loan and any and all other amounts payable by the Borrower hereunder.

"Loan Repayment Dates" means: (i) with respect to Loan Repayments attributable to any payment of principal and interest monthly on the first day of the month, and continuing on the first day of each month thereafter until the Loan is paid in full, or if such day is not a Business Day, then on the next preceding Business Day and as more fully described on **Exhibit D** attached hereto; and (ii) with respect to all other Loan Repayments, at any time on demand by the Authority.

"Person" means any individual, corporation, partnership, limited partnership, joint venture, association, joint-stock company, trust, unincorporated association, limited liability corporation or partnership, or government or any agency or subdivision thereof, or other legal entity or group of entities.

"Project" or "Projects" means the construction, rehabilitation or repair of public school facilities, and equipment for public school facilities as described in **Exhibit C** hereto. **Exhibit C** shall be amended automatically, and without further action required by the Borrower, to conform **Exhibit C** to any additional project that is approved by the Lender. Where more than one Project is being financed, Project applies to each Project individually or collectively, as the context requires.

"State" means the State of Tennessee.

Section 1.02. Interpretation. Words of the masculine gender shall be deemed and construed to include correlative words of the feminine and neuter genders. The word "person" shall include the plural as well as the singular number unless the context shall otherwise indicate; the word "person" also shall include corporations, associations, natural persons and public bodies unless the context shall otherwise indicate.

ARTICLE 2
Project

Section 2.01. Description. Attach proposal submitted to Lender for approval.

Section 2.02. Funding. The Project is to be funded as follows:

Loan from the Fund	$5,000,000.00

ARTICLE 3
The Loan

Section 3.01. Loan. The Lender hereby agrees to lend and advance to the Borrower and the Borrower hereby agrees to borrow and accept from the Lender, the Loan in the principal amount of $5,000,000 for a term of ten (10) Years at 1.5%. The Lender shall disburse the proceeds of the Loan to the Borrower from amounts on deposit in the Fund. The Loan shall bear interest at the rate established by the Lender at its meeting at which this Loan was approved; such interest rate is stated on the repayment schedule attached hereto as **Exhibit D**. Amounts disbursed during construction shall bear interest at such rate, and such interest shall accrue and be added to principal for the periods from the Dates of Disbursement through the first Loan Repayment Date.

Section 3.02. Use of Proceeds by the Borrower. The Borrower will use the funds lent to it by the Authority pursuant to Section 3.01 hereof solely to pay the Costs of the Project.

Section 3.03. Disbursements of Loan Proceeds. The Lender shall disburse funds from the Fund only upon receipt of a requisition, appropriately completed and signed by an Authorized Borrower Representative in the form attached hereto as **Exhibit A**. Each request by the Borrower for disbursement shall constitute a certification by the Borrower that all representations made by the Borrower in this Loan Agreement remain true as of the date of the request and that no material adverse developments affecting the financial condition of the Borrower or its ability to complete the Project or repay the Loan have occurred since the date of this Loan Agreement unless specifically disclosed in writing by the Borrower with the request of disbursement. Proper invoices and other documentation reasonably required by and acceptable to the Lender must be submitted with each request for disbursement. The Lender may conduct audits or request documentation to determine the cost incurred by the Borrower for the Project. No more than ninety (90%) percent of the Loan shall be disbursed to the Borrower prior to the time the Project has been completed and approved by the Lender. After approval by the Lender, the remaining ten (10%) percent of the Loan will be disbursed to the Borrower.

Section 3.04. Completion of the Projects. When requesting final payment from the Fund, the Borrower shall cause to be submitted the requisition required by Section 3.03 hereof and a certificate signed by an Authorized Borrower Representative in the form attached hereto as **Exhibit B**. Said certificate shall state that no further funds will be withdrawn from the Fund to pay the Cost of the Project. The Lender does not make any warranty, either express or implied, that the moneys which, under provisions of this Loan Agreement, will be available for payment of the Costs of the Project, will be sufficient to pay all of the Costs of the Project.

ARTICLE 4
Payment Obligations of Borrower

Section 4.01. Loan Repayments. The Borrower agrees to pay to the Lender all Loan Repayments on each Loan Repayment Date, in the amounts and in the manner hereinafter provided. The repayment schedule requires payments of principal and interest to begin on the first Loan Repayment Date following the passage of sixty (60) days after the Project is completed. The repayment schedule initially attached hereto as **Exhibit D** is based on certain assumptions regarding disbursed principal amounts, the completion date and zero accrued interest. After the completion of the Project and prior to the first Loan Repayment Date thereafter, the Lender will furnish the Borrower a revised repayment schedule reflecting the actual principal amount disbursed together with the accrued interest thereon and the actual Loan Repayment Dates. This revised repayment schedule is to be substituted for the one initially attached hereto as **Exhibit D** and shall be conclusive absent manifest error. The revised repayment schedule shall not constitute an amendment of this Loan Agreement requiring approval by the parties hereto.

Section 4.02. Time and Manner of Payment. Except as provided in Section 4.05 hereof, the Borrower agrees to make each Loan Repayment directly to the Loan Administrator on or before each Loan Repayment Date in lawful money of the United States of America by electronic funds transfer of immediately available funds in accordance with instructions supplied from time to time by the Lender or the Loan Administrator.

Section 4.03. Payments; Obligation of Borrower Unconditional. The obligation of the Borrower to make payments hereunder and to perform and observe all other covenants, conditions and agreements hereunder shall be absolute and unconditional until payment of all Borrower obligations hereunder, irrespective of any defense or any rights of setoff, recoupment or counterclaim which the Borrower might otherwise have against the Lender. Until payment of all Borrower obligations hereunder, the Borrower shall not suspend or discontinue any such payment hereunder or fail to observe and perform any of their other covenants, conditions and agreements hereunder for any cause, including without limitation failure of consideration, failure of title to any part of all of the Projects, or commercial frustration of purpose, or any damages to or destruction or condemnation of all or any part of the Projects, or any change in the tax or other laws of the United States of America, the State of Tennessee or any political subdivision of either, or any failure of the Lender to observe and perform any covenant, condition or agreement, whether express or implied, or any duty, liability or obligation arising out of or in connection with any document in connection with the financing of the Project. Nothing contained in this Section, however, shall be construed to release the Lender from the performance of any of its obligations hereunder or under any documents related hereto.

Section 4.04. Reduction of Principal. The Loan will be reduced, and a new repayment schedule shall be provided to the Borrower as provided in Section 4.01, if less than the full amount of the Loan is disbursed to the Borrower.

Section 4.05. Prepayment. The Borrower may prepay all or any portion of the Loan and any accrued interest thereon at any time without penalty.

ARTICLE 5
Representations and Covenants of Borrower

The Borrower makes the following representations and covenants, in addition to those elsewhere set forth herein, as the basis for the undertakings on the part of the Lender contained herein:

(a) The Borrower is a municipal corporation or political subdivision, as appropriate, duly created and existing under the laws of the State of Tennessee, and has full legal right, power and authority (i) to conduct its business and own its properties, (ii) to enter into this Loan Agreement, and (iii) to carry out and consummate all other transactions contemplated by this Loan Agreement.

(b) With respect to the authorization, execution and delivery of this Loan Agreement, the Borrower has complied and will comply with all applicable laws of the State of Tennessee.

(c) The Borrower has duly approved the execution and delivery of this Loan Agreement and has authorized the taking of any and all action as may be required on the part of the Borrower to carry out, give effect to and consummate the transactions contemplated by this Loan Agreement.

(d) This Loan Agreement has been duly authorized, executed and delivered by the Borrower and, assuming due authorization, execution and delivery by the Lender, will constitute a legal, valid and binding obligation of the Borrower enforceable in accordance with its terms, subject to bankruptcy, insolvency, moratorium, reorganization or other similar laws affecting the enforcement of creditors' rights generally or by such principles of equity as the court having jurisdiction may impose with respect to certain remedies which require or may require enforcement by a court of equity and no other authorization is required.

(e) There is no action, suit, proceedings, inquiry on investigation, at law or in equity, before or by any court, public board or body, pending or, to the knowledge of the Borrower, threatened against the Borrower, nor is there any basis therefor, (i) affecting the creation, organization or existence of the Borrower or the title of its officers to their respective offices, (ii) seeking to prohibit, restrain or enjoin the execution or delivery of this Loan Agreement or (iii) in any way contesting or affecting the validity or enforceability of this Loan Agreement or any agreement or instrument relating to any of the foregoing or used or contemplated for use in the consummation of the transactions contemplated by any of the foregoing.

(f) The Borrower is not in any material respect in breach of or in default under any applicable law or administrative regulation of the State or the United States of America or any applicable judgment or decree or any agreement or other instrument to which the Borrower is a party or by which it or any of its properties is bound, and no event has occurred which with the

passage of time, the giving of notice or both would constitute such a breach or default; and the execution and delivery of this Loan Agreement and compliance with the respective provisions thereof will not conflict with or constitute a breach of or default under any applicable law or administrative regulation of the State or of the United States of America or any applicable judgment or decree or any agreement or other instrument to which the Borrower is a party or by which it or any of its property is bound.

(g) The Borrower is not in default under any loan agreement, note, bond, mortgage or other instrument evidencing or securing indebtedness.

(h) All information provided to the Lender in this Loan Agreement or in any other document or instrument with respect to the Loan, this Loan Agreement or the Project, was at the time provided, and is now, true, correct and complete, and such information does not omit to state any material fact necessary to make the statements therein, in light of the circumstances under which they were made, not misleading.

(i) The Borrower covenants to complete the Project in a timely fashion in accordance with the project schedule provided to the Lender and to comply with all applicable State statutes, rules, and regulations pertaining to this Loan Agreement and the Project as well as with any conditions that may have been established by the Lender when it approved this Loan.

(j) The Borrower covenants to establish and maintain adequate financial records for the Project in accordance with generally accepted government accounting principles; to allow for an audit by the State of financial records and transactions covering any fiscal year for which a Project Loan has been approved and not yet repaid in full.

ARTICLE 6
Events of Default

Section 6.01. Events of Default. An Event of Default shall occur hereunder if any one or more of the following events shall happen:

(a) payments required by Sections 4.01 through 4.04 are not paid punctually when due;

(b) default shall be made by the Borrower in the due performance of or compliance with any of the terms hereof, other than those referred to in the foregoing subdivision (a), and such default shall continue for sixty (60) days after the Lender shall have given the Borrower written notice of such default (or in the case of any such default which cannot with due diligence be cured within such 60-day period, if the Borrower shall fail to proceed promptly to commence curing the same and thereafter prosecute the curing of such default with due diligence, it being intended in connection with any such default not susceptible of being cured with due diligence within the 60 days that the time to cure the same shall be extended for such period as may be reasonably necessary to complete the curing of the same with all due diligence);

(c) the Borrower shall file a voluntary petition in bankruptcy, or shall be adjudicated a bankrupt or insolvent, or shall file any petition or answer seeking any reorganization, composition, readjustment, liquidation or similar relief for itself under any present or future statute, law or regulation, or shall seek or consent to or acquiesce in the appointment of any trustee, receiver or liquidator of the Borrower or of all or any substantial part of its properties or of the Projects or shall make any general assignment for the benefit of creditors, or shall admit in writing its inability to pay its debts generally as they become due; or

(d) a petition shall be filed against the Borrower seeking any reorganization, composition, readjustment, liquidation or similar relief under any present or future statute, law or regulation and shall remain undismissed or unstayed for an aggregate of 90 days (whether or not consecutive), or if any trustee, receiver or liquidator of the Borrower or of all or any substantial part of its properties or of the Projects shall be appointed without the consent or acquiescence of the Borrower and such appointment shall remain unvacated or unstayed for an aggregate of 90 days (whether or not consecutive).

Section 6.02. Remedies. Upon the continuing occurrence of an Event of Default, regardless of the pendency of any proceeding which has or might have the effect of preventing the Borrower from complying with the terms of this Loan Agreement, the Lender, or any other Person who has succeeded to the rights of the Lender hereunder, at any time thereafter and while such Event of Default shall continue, may, at its option, take any action at law or in equity to collect amounts then due and thereafter to become due hereunder, including without limitation declaring the unpaid principal and interest to be immediately due and payable, or to enforce performance and observance of any obligation, agreement or covenant of the Borrower under this Loan Agreement.

ARTICLE 7
Conditions Precedent to Loan

Section 7.01. Borrower's Certificate. Prior to execution of the Loan Agreement by the Lender, the Borrower shall have furnished to the Lender, in form and substance satisfactory to the Lender, a certificate of the Borrower certifying the resolution authorizing the Borrower to enter into this Loan Agreement.

Section 7.02. Attorney's Opinion. Prior to execution of the Loan Agreement by the Lender, the Borrower also shall have furnished to the Lender, in form and substance satisfactory to the Lender, an opinion of Borrower's counsel to the effect that: (1) the Borrower has been duly created and is validly existing and has full power and authority (under its Charter and By-Laws or general law, if applicable, and other applicable statutes) to enter into and carry out the terms of this Loan Agreement; (2) this Loan Agreement is duly executed and constitutes a valid and binding contract of the Borrower, enforceable in accordance with its terms except as the enforceability thereof may be limited by bankruptcy, reorganization, insolvency, moratorium, or similar laws affecting the enforcement of creditors' rights generally; (3) this Loan Agreement is not in conflict in any material way with any contracts or ordinances of the Borrower; and (4) there is no litigation materially adversely affecting this Agreement or the financial condition of the Borrower.

ARTICLE 8
Miscellaneous

Section 8.01. Waiver of Statutory Rights. The rights and remedies of the Lender and the Borrower under this Loan Agreement shall not be adversely affected by any laws, ordinances, or regulations, whether federal, state, county, city, municipal or otherwise, which may be enacted or become effective from and after the date of this Loan Agreement affecting or regulating or attempting to affect or regulate any amounts payable hereunder.

Section 8.02. Non-Waiver by Lender. No failure by Lender or by any assignee to insist upon the strict performance of any term hereof or to exercise any right, power or remedy consequent upon a breach thereof, and no acceptance of any payment hereunder, in full or in part, during the continuance of such breach, shall constitute waiver of such breach or of such term. No waiver of any breach shall affect or alter this Loan Agreement or constitute a waiver of a then existing or subsequent breach.

Section 8.03. Remedies Cumulative. Each right, power and remedy of Lender provided for in this Loan Agreement shall be cumulative and concurrent and shall be in addition to every other right, power or remedy provided for in this Loan Agreement, or now or hereafter existing at law or in equity or by statute or otherwise, in any jurisdiction where such rights, powers or remedies are sought to be enforced, and the exercise or beginning of the exercise by the Lender of any one or more of the rights, powers or remedies provided for in this Loan Agreement or now or hereafter existing at law or in equity or by statute, or otherwise shall not preclude the simultaneous or later exercise by the Lender of any or all such other rights, powers or remedies.

Section 8.04. Amendments, Changes and Modification. This Loan Agreement may not be effectively amended, changed, modified, altered or terminated without the written agreement of each of the parties hereto, provided, however, that changes by the Lender to the repayment schedule attached hereto as **Exhibit D** after completion of construction as provided in Section 4.01 shall not be deemed an amendment, change or modification or alteration hereof.

Section 8.05. Applicable Law - Entire Understanding. This Loan Agreement shall be governed exclusively by the applicable laws of the State of Tennessee. This Loan Agreement expresses the entire understanding and all agreements of the parties hereto with each other and neither party hereto has made or shall be bound by any agreement or any representation to the other party which is not expressly set forth in this Loan Agreement.

Section 8.06. Severability. In the event that any clause or provision of this Loan Agreement shall be held to be invalid by any court of competent jurisdiction, the invalidity of such clause or provisions shall not affect any of the remaining provisions of such instrument.

Section 8.07. Notices and Demands. All notices, certificates, demands, requests, consents, approvals and other similar instruments under this Loan Agreement shall be in writing, and shall be deemed to have been properly given and received if sent by United States certified or registered

mail, postage prepaid, (a) if to the Borrower, addressed to the Borrower, Hamilton County Mayor, 625 Georgia Ave, Chattanooga, TN 37402 or (b) if to the Lender, Energy Efficient Schools Initiative, Andrew Johnson Tower – 10th Floor, 710 James Robertson Parkway, Nashville, TN 37243, ATTN: Executive Director, with a copy to Division of State Government Finance, Cordell Hull Building, 425 Rep. John Lewis Way North, Nashville, Tennessee 37243-3400, or at such other addresses as any addressee from time to time may have designated by written notice to the other addressees named above.

Section 8.08. Headings and References. The headings in this Loan Agreement are for the convenience of reference only and shall not define or limit the provisions thereof. All references in this Loan Agreement to particular Articles or Sections are references to Articles or Sections of this Loan Agreement, unless otherwise indicated.

Section 8.09. Successors and Assigns. The terms and provisions of this Loan Agreement shall be binding upon and inure to the benefit of the parties hereto and their respective successors and permitted assigns.

Section 8.10. Multiple Counterparts. This Loan Agreement may be executed in multiple counterparts, each of which shall be an original but all of which together shall constitute but one and the same instrument.

Section 8.11. No Liability of Lender's and Borrower's Officers. No recourse under or upon any obligation, covenant or agreement contained in this Loan Agreement shall be had against any incorporator, member, director or officer, as such, past, present or future, of the Lender or the Borrower, either directly or through the Lender or the Borrower. Any and all personal liability of every nature, whether at common law or in equity, or by statute or by constitution or otherwise, of any such incorporator, member, director or officer is hereby expressly waived and released by the Borrower and the Lender against the other's incorporators, members, directors or officers as a condition of and consideration for the execution of this Loan Agreement.

Section 8. 12. Loan Administrator. Any function required or permitted to be performed hereunder by the Lender may, in the Lender's sole determination and upon notice to the Borrower, be performed by the Loan Administrator. After such notice to the Borrower, the Borrower shall deal solely with the Loan Administrator with respect to such matters.

Signatures on Following Page

IN WITNESS WHEREOF, the parties to this Agreement have caused the Agreement to be executed by their respective duly authorized representatives.

BORROWER

NAME: _____ (County)

BY: _____ (Signature)

TITLE: _____

DATE: _____

SCHOOL BOARD

NAME: _____

BY: _____ (Signature)

TITLE: _____

DATE: _____

SCHOOL DIRECTOR

NAME: _____

BY: _____ (Signature)

TITLE: _____

DATE: _____

LENDER:

ENERGY EFFICIENT SCHOOLS COUNCIL

BY: _____ (Signature)

TITLE: _____

DATE: _____

EXHIBIT A

REQUISITION

REQUISITION NO. _____

Energy Efficient Schools Council

The undersigned, being an Authorized Borrower Representative within the meaning of that term as set forth in a loan agreement (the "Loan Agreement"), dated _____, 2024, by and between the Energy Efficient Schools Council and Hamilton County, Tennessee (the "Borrower"), submits this Requisition on behalf of the Borrower pursuant to Section 3.03 of the Loan Agreement, as follows:

1. Borrower hereby requests disbursement to the Borrower pursuant to the Loan Agreement of $_____.

2. All amounts advanced hereunder will be used to pay Cost of the Project, as defined in the Loan Agreement.

3. The amounts requested hereunder have not been the subject of a previous request for disbursement of funds.

4. The subject of this request is a proper Costs of the Project, as described in the Loan Agreement.

5. The amount requested should be wired to:

Bank: _____
ABA Number: _____
Account Name: _____
Account Number: _____

It is understood that your duties will be discharged with respect to the disbursement requested hereunder if payment is made as provided herein.

IN WITNESS WHEREOF, the undersigned has hereunto set his (her) hand, this _____ day of _____, _____.

Name:

_____

Title: _____

Funding Date: _____, _____, ____.

EXHIBIT B

COMPLETION CERTIFICATE

The undersigned, being an Authorized Borrower Representative within the meaning of that Loan Agreement ("Loan Agreement"), dated _____, 2024, by and between the Energy Efficient Schools Council and Hamilton County, Tennessee (the "Borrower"), submits this Completion Certificate on behalf of the Borrower pursuant to Section 3.04 of the Loan Agreement, as follows:

1. No additional advances of funds under the Loan Agreement will be requested from the Trustee, and no additional Requisitions for disbursement of funds will be presented to the Trustee;

2. The Project or Projects to be financed with the proceeds of the Loan under the Loan Agreement have been completed or sufficient funds are available to complete the Project or Projects to the satisfaction of the Borrower; and

Notwithstanding the foregoing, this Certificate is given without prejudice to any rights against third parties which exist as of the date hereof or which may subsequently come into being.

IN WITNESS WHEREOF, the undersigned has hereunto set his (her) hand this _____ day of _____.

Hamilton County Tennessee

Name: _____

Title: _____

EXHIBIT C

DESCRIPTION OF PROJECT

ECM Measures

Lighting, Lighting Sensors, RGB lighting in SPED room

Background

The upgrading and/or replacement of approximately 51,800 lighting fixtures and associated lamps and ballast. Additionally, at least one classroom at each school will receive High CRI (>90) lamps (Keystone KT-LED15T8-48GC-9XX-D) . Once on-site our team will identify at least one SPED classroom at each school to receive these High CRI lamps. Project will provide the district with the best technology in the country and generates a direct reduction in both electric bills and in lamp and ballast maintenance expense.

This project is expected to conservatively generate annual energy savings of $523,289 at a project cost of $5,000,000, with a simple payback of 9.4 years. A large portion of the project will improve lighting in areas that have inadequate lighting. School personnel will be trained on the maintenance of lighting and control products.

EXHIBIT D

REPAYMENT SCHEDULE

Hamilton County **Estimated**** **Loan No.** **330-001**

PRINCIPAL	$ 5,000,000	
ACCRUED INTEREST		*
TOTAL AMORTIZED	$ 5,000,000	
RATE OF INTEREST	1.50%	
MONTHS	120	
MONTHLY PAYMENTS	$ 44,840	***
TOTAL INTEREST	$ 380,764	
TOTAL PAYMENTS	$ 5,380,764	

PERIOD			BEGINNING PRINCIPAL BALANCE	PRINCIPAL REQUIREMENT (PER MONTH)	INTEREST REQUIREMENT (PER MONTH)	TOTAL DEBT SERVICE REQUIREMENT (PER MONTH)	ENDING PRINCIPAL BALANCE
Payment 1	** TO	Payment 12	$ 5,000,000	$ 38,913	$ 5,927	$ 44,840	$ 4,533,044
Payment 13	TO	Payment 24	4,533,044	39,501	5,339	44,840	4,059,032
Payment 25	TO	Payment 36	4,059,032	40,097	4,743	44,840	3,577,868
Payment 37	TO	Payment 48	3,577,868	40,703	4,137	44,840	3,089,432
Payment 49	TO	Payment 60	3,089,432	41,318	3,522	44,840	2,593,616
Payment 61	TO	Payment 72	2,593,616	41,942	2,898	44,840	2,090,312
Payment 73	TO	Payment 84	2,090,312	42,575	2,265	44,840	1,579,412
Payment 85	TO	Payment 96	1,579,412	43,218	1,622	44,840	1,060,796
Payment 97	TO	Payment 108	1,060,796	43,871	969	44,840	534,344
Payment 109	TO	Payment 119	534,344	44,533	307	44,840	44,481
Payment 120			44,481	44,481	323	44,804	-
		Total		$ 5,000,000	$ 380,764	$ 5,380,764	

* Total amount of accrued interest to be determined at the completion of the project.

** Actual payment and date to be determined upon completion of project.

*** Please note that the final payment may differ slightly from the regularly scheduled monthly payment.

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

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

From: Dr. Robert Sharpe – Chief Operating Officer
Mary Ellen Heuton, CPA – Chief Financial Officer
Justin Witt – Executive Director of Maintenance

Date: January 15, 2026

Subject: Bond Funded Capital Projects and FY26 Budget Amendment – Self-funded

Board Agenda Category:

- ☐ Consent Agenda
- ☑ Action Item
- ☐ Reports and Information

Hamilton County Government has issued Series 2024A Bonds to support both projects related to our Facilities plan and $60 million in Deferred Maintenance. A proposed project list for Phase 5 of the Deferred Maintenance Projects is attached.

Board approval is requested to accept the proposed project list.

Additionally, these funds will be managed in a Self-funded account. Approval is also requested to amend the FY26 Self-funded budget as follows:

- Increase county for contributions from the county of $2,460,000
- Appropriate $2,460,000 for Deferred Maintenance Expenditures

Opportunity 2030 Commitment Connection

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

Phase Five 60 million bond fund			
Dist	School	Project	
1	Soddy High	Classroom/kitchen roof	$325,000
6	Rivermont	Chiller	$230,000
7	Westview	Building settlement	$550,000
8	Spring Creek	Chiller	$255,000
	Systemwide	LED lighting upgrade	$500,000
	Systemwide	Deferred maintenance materials	$600,000
			$2,460,000

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

To: Hamilton County Board of Education

From: Joe Smith, HCDE School Board Chairman

Date: December 18, 2025

Subject: Review of Director Justin Robertson's Annual Performance Evaluation

Board Agenda Category:

- ☐ Consent Agenda
- ☐ Action Item
- ☑ Reports and Information

The purpose is to formally review the performance of Director Justin Robertson for the 24-25 academic year, assess progress against established goals, provide constructive feedback, and set strategic objectives for the upcoming year, ensuring alignment with the district's mission and student outcomes, as set in Opportunity 2030 Strategic Plan.

The key areas of evaluation and feedback were Strategic Planning; Student Achievement/Performance; School Leadership; Community Relationships; Business and Finance; Board Relationship; Staff and Personnel Relationships; Integrity, Fairness, and Ethics; Facilities/Safety; and District Management. The strengths and areas of growth will be discussed and collaborative planning for another successful year.

Opportunity 2030 Commitment Connection

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

Hamilton County School Board

Performance Evaluation of Superintendent of Schools

December 18, 2025

	Steve Slater District 1	Ben Daugherty District 2	Joe Smith District 3	Jackie Thomas District 4	Karitsa Jones District 5	Ben Connor District 6	Jodi Schaffer District 7	Larry Grohn District 8	Gary Kuehn District 9	Felice Hadden District 10	Jill Black District 11
Strategic Planning	3.1	3.2	4.3	4.0	4.2	4.0	3.5	4.7	3.7	3.5	4.5
Student Achievement/Performance	2.8	3.1	4.2	4.0	3.9	4.2	3.6	4.3	3.6	3.6	4.2
School Leadership	3.1	3.7	4.6	4.0	4.3	4.2	4.1	4.6	3.4	3.6	4.4
Community Relationships	2.8	3.5	4.8	4.0	5.0	3.5	4.0	4.5	4.0	4.0	4.5
Business and Finance	2.8	3.8	4.5	3.8	4.0	3.3	3.6	4.4	4.0	3.6	3.8
Board Relationship	3.2	3.4	4.0	4.0	3.6	3.0	3.2	4.0	3.6	3.8	3.8
Staff and Personnel Relationships	2.9	3.9	4.1	3.8	3.9	3.5	3.5	4.3	3.5	3.5	4.4
Integrity, Fairness, and Ethics	3.5	4.0	4.6	3.3	4.0	4.0	3.5	4.8	4.0	3.3	4.5
Facilities/Safety	3.0	4.7	4.2	4.0	3.7	3.8	3.5	5.0	3.3	3.7	4.7
District Management	3.6	3.8	4.1	3.8	4.0	3.8	3.7	5.0	3.8	3.8	4.2

Evaluation Scores	3.1	3.6	4.3	3.9	4.0	3.8	3.6	4.5	3.6	3.6	4.3
Average Evaluation Score	3.8										

Hamilton County Board of Education

Evaluation Model for the Director of Hamilton County Schools

Tennessee law requires the Hamilton County Board of Education to assign to the Director of Schools the day-to-day responsibility of operating the system within the approved budget and consistent with law and policy. Consequently, the selection and evaluation of the Director is one of the most important functions the Board of Education performs.

In order to fulfill its statutory obligations, and so the Director may have clear guidance regarding the Board's evaluation of his/her performance, the Board of Education, in consultation with the Director, has developed this Evaluation Model for the 2025-2026 school year. The foundation of this Evaluation Model is the Board's Strategic Plan, including corresponding annual goals; the laws of the State of Tennessee; and the Board's contract with the Director.

This Model will consist of three parts:

- **The Director's self-evaluation.**
  - **The Director will evaluate his/her own performance as well as the performance of the system using the criteria set forth below.**
  - **The Director will submit his/her self-evaluation to the Chair of the Board within 30 days of receipt of the State's annual assessment data of Hamilton County Schools.**
- **The Board's evaluation of the Director's performance.**
  - **The Board will evaluate the Director and the system using the criteria set forth below, the Director's self-evaluation, and the State's assessment data.**
  - **Each Board member will complete his or her evaluation within 30 days of receipt of the Director's self-evaluation and submit it to the Board secretary and the Board attorney.**
- **The Director's written response to the Board's evaluation.**

The Director and the Board will use the following Rating Scale:

1 = Significantly below expectations
2 = Below expectations
3 = At expectations
4 = Above expectations
5 = Significantly above expectations

Strategic Planning Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Agendas from district leadership and principal professional development. • District and school level goals for professional development related to student achievement, gap closure, college-career readiness, and growth. • District and School Improvement Plans that operationalize Opportunity 2030	Builds limited or no capacity for: • Developing administrators' understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to build administrator capacity.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Builds capacity among administrators for: • Developing an accurate understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources and instructional programs. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to improve instruction.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Communicates Opportunity 2030 to all staff. • Ensures the Board's vision, mission, and goals shape the educational programs, plans, and activities. • Actively monitors, evaluates, advises, and regularly updates the Board on Opportunity 2030

Strategic Planning	Score	Comments
Develop and implement Opportunity 2030 in collaboration with the school board to address key performance indicators on a yearly basis.	3	
Initiates communication and facilitates cooperation and collaboration among staff regarding Opportunity 2030.	4	
Keeps the Board and community informed of progress towards goals set in Opportunity 2030.	3	
Ensures the vision shapes the educational programs, plans, and activities of the district.	3	
Uses assessment data related to student learning to effectuate the Board's strategic plan.	4	
Leads the Board in recasting or reframing the vision as necessary based upon available data.	4	

TOTAL SCORE: 21

Student Assessment/Performance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Sample of school and district improvement plans with strategies. • District and school level TVAAS scores. • Data summary of all district and school level accountability metrics. • Performance and monitoring data of district wide sub-groups. • District plan for monitoring school improvement plans and student academic performance. • Review of district report card.	Shows limited or no use of: • Multiple student, educator, school-wide, and district-wide data. • Specific data when analyzing and tracking student progress. • Academic and behavioral growth goals. • Expectations for adjusting instructional programs based on data. • Shared accountability for decisions targeting student achievement and growth goals. • No observable alignment between interventions and student achievement. • Planning that addresses academic growth goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Collaborates with administrators to: • Use multiple sources of student, educator, school and district-wide data. • Determine specific data to analyze when tracking student progress. • Establish specific strategies to meet or exceed academic and behavioral growth goals. • Communicate expectations for adjusting instruction programs in response to assessment data. • Establish shared accountability for instructional decisions targeting student achievement and growth goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Ensures administrators analyze and use multiple sources of student, educator, school and district-wide data. • Develops and monitors a district-wide data plan that includes: student progress tracking; strategies to meet or exceed growth and achievement goals; benchmark data; and data based changes to the instructional program. • Shared accountability for instructional decisions targeting achievement and growth goals. Establishes data-specific growth and achievement targets that result in gains

Student Achievement/Performance	Score	Comments
District Wide Value-Added will meet or exceed the State expectations each year.	4	
The percentage of students scoring below the 25th percentile will decrease by 2% each year.	2	Improved, but more needed imo
Collaborates with administrators to analyze and use multiple forms of data throughout the year to establish specific goals and strategies targeting student achievement and growth.	3	
Develops, monitors, and assesses district and school improvement plans, including the regular review and analysis of district test scores by school and sub-groups.	3	
Leads administrators to develop and execute interventions that address all student learning needs based on multiple sources of data.	2	ExEd lacks in many phases
Applies and communicates qualitative and quantitative findings to identify strengths and weaknesses in programs and practices in order to ensure continuous improvement.	3	
Establishes systems for principals to regularly receive feedback on goal achievement and to assess ongoing school improvement efforts.	2.5	
Encourages various staffing patterns, student grouping plans, class scheduling plans, school organizational structures, and facilities design processes to support various teaching strategies and desired student outcomes.	3	
Increase Graduation Rate with a goal of reaching 90% within the next 4 years.	3	Goal met. But what would it Be without Edgenuity?

TOTAL SCORE: 25.5

School Leadership Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• District leadership team meeting agendas and notes. • School level summary of principal use of data in determining staffing needs and placement. • Summary of school level use of teacher effectiveness data and teacher leaders. • Samples of staff and student recognition events at each school. • Nature, extent, and frequency of complaints or concerns voiced about subordinates within chain of command.	• Limited or no assignment of administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Limited or no opportunities to extend impact of high-performing teachers. • Clear criteria for recognition and celebration of schools and student performance and growth. • Shows limited or no use of the evaluation process and does not meet with administrators. • Repeated complaints or concerns being raised within chain of command, to include the Board.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Assigns administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Provides opportunities to extend impact of high performing teachers and administrators. • Creates and implements clear criteria for recognition of schools and students. • Ensures administrators provide structured feedback and use the evaluation process for professional learning and growth. • Uses evaluation data to determine trends.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Engages with administrators to review multiple data sources. • Creates a coherent system to extend impact of administrators. • Supports school rituals, traditions, and initiatives. • Builds and sustains a focused on continuous improvement. Creates a district-wide plan for professional learning aligned to the Board's vision for professional learning and growth.

School Leadership	Score	Comments
Develop competent leadership at the district level and school level through intentional leadership pipelines.	2.5	
Leverages administrators' strengths to engage all students in meaningful, relevant learning opportunities while ensuring employees are accountable for job responsibilities.	3	
Knowledgeable about the curriculum and establishes clear expectations for administrators.	4	
Supports professional learning activities for teachers and administrators.	4	
Uses administrator evaluation data to inform, assess, and adjust professional learning, goals, and plans.	3	
Demonstrates use of system and staff evaluation data for personnel policies, decision-making, promotion of career growth, and professional development.	3	
Offers professional development that is focused on student learning consistent with the school district's vision, mission, and goals.	2	P.D. Days are often not used for P.D. New teachers need much more training than experienced ones

TOTAL SCORE: 21.5

Community Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school district level website, newsletters, and surveys if available. • Examples of meeting agendas and schedules for parental involvement and community engagement. • Samples of school partnerships and partnership activities. • Samples of meetings and conversations with community partners and educators. • Donations and contributions to each school or the district.	Shows limited or no evidence of: • Welcoming and engaging families. • Offering timely, relevant, and accessible communication. • Providing district staff with sufficient resources needed to communicate regularly with families. • Creating flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Assessing community partners and resources. • Allocating fiscal, human, technological, and physical resources or allocates these with misalignment to the Board's vision, mission, and goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Welcomes and engages all families. • Offers opportunities for families to participate in school initiatives when applicable. • Provides district staff with sufficient resources needed to communicate regularly with families. • Creates flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Conducts an accurate assessment of community partners and resources. • Ensures accepted resources support the Board's vision, mission, and goals. • Allocates fiscal, human, technological, and physical resources to align with the Board's vision, mission, and goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements: • Establishes a two-way communication process for families that provides information about student progress and learning. • Supports family and community partnerships that are visible and sustainable. • Assesses potential community partners and secures additional resources that support the district. Highlights usage of resources and shares district accomplishments by regularly communicating with community partners.

Community Relationships	Score	Comments
Identifies multiple points of view for problem solving situations and involves stakeholders in decisions affecting the district.	2.5	Community + Parents POV should be listened to a little more.
Strategically utilizes community resources and established partnerships to support the Board's vision, mission, and goals.	3	

TOTAL SCORE: 5.5

Business and Finance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of compliance with all financial audits including local, state, and federal. • Provide samples of both student and employee handbooks. • Provide samples of meeting with certified and noncertified staff on compliance with all Board policies and operating procedures. • Provide sample administrative procedures aligned with Board policy, state law, and federal requirements. • Board work session reports and agenda documents showing budgeting aligned with priorities.	• Rarely or never establishes, communicates, and enforces administrative procedures by: o Aligning them with Board policy, state law, and federal requirements. o Communicating established administrative procedures. o Ensuring administrators are accountable to the administrative procedures. • Rarely or never performs all budgetary responsibilities by: o Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Establishes, communicates, and enforces administrative procedures by: o Aligning them with Board policy, state law, and federal requirements. o Communicating established administrative procedures. o Ensuring administrators are accountable to the administrative procedures. • Performs timely, accurate, and transparent budgetary responsibilities by: o Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Leads administrators and staff in frequent reviews of administrative procedures to vet effectiveness and ensure the effective and efficient operation of the school district. • Leads administrators in frequent reviews of fiscal resource allocation to support the effective and efficient operation of the district.

Business and Finance	Score	Comments
Budget will be presented on time and in a transparent manner to both the board and community	2.5	We know budget is always a concern. Knowing the board is wanting a balanced Budget and some money saved.
Steps will be articulated and implemented to ensure school leaders are resourced to address unique needs of every school.	2	
Demonstrates budget management including financial forecasting, planning, cashflow management, account auditing, and monitoring and oversees the district's fiduciary responsibilities.	2.5	We were 18M short to begin with last year.
Provides accurate and timely reports to the Board on the financial condition of the school system.	4	
Meets and works collaboratively with the Board and appropriate staff to determine budget priorities, including alignment with strategy and the effective allocation of resources.	3	Always willing and able to discuss any Questions or problems I bring up.

TOTAL SCORE: 14

Board Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provides supporting documentation for each section of the director's evaluation instrument. • Samples of administrative procedures that adhere with Board policy.	• Inconsistently uses feedback from the Board to improve and demonstrates little evidence of growth. • Unprepared or disengaged with the Board and professional learning opportunities. • Engages in the evaluation process without evidence of focus on continuous improvement. • Self-reflections do not match the expectations of the Board of the director's evaluation instrument. • Inconsistently contributes to school district growth by failing to assist and mentor administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from the Board to implement personal and professional improvement strategies. • Prepared and engaged with the Board and professional learning opportunities. • Engages in the evaluation process with evidence of focus on improvement. • Contributes to the school district by assisting others, including at least two of the following. o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively participating in professional learning. • Building capacity for aspiring administrators.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Uses feedback from the Board to significantly improve performance. • Consistently prepared and highly engaged with the Board and in professional learning opportunities. • Engages in the evaluation process and seeks out feedback, matching the expectations of the Board and director's evaluation instrument. • Actively and consistently contributes to the school district by assisting and/or mentoring others, including: o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively leading professional learning. o Leading data-driven professional learning opportunities. o Building capacity for aspiring administrators.

Board Relationship	Score	Comments
Keeps board members informed on issues, needs, and operation of the school system.	3	
Follows through on initiatives and strategies communicated to the Board of Education	2	Sometimes there are differences (although slight) between discussions and final readings
Seeks and accepts constructive criticism of work from the Board	3	
Interprets and executes the intent of Board policy through the development of administrative procedures	3	
Maintains/improves relations with the Board by consistent and appropriate interpersonal/professional interactions while making appropriate recommendations based on thorough analysis and study.	5	always willing to discuss issues with me.

TOTAL SCORE: 16

Staff and Personnel Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of district level plan for recruiting both professional and noncertified staff. • Samples of school level data regarding induction, support, retention, and growth of staff. • Samples of school level plans to increase the rates of high-performing educators and increase retention rates.	• Rarely or never inducts, supports, retains, and grows administrators by designing and implementing an induction program for new administrators and staff. • Rarely or never develops strategies for: o Retaining high-performing educators and administrators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Designs and implements an induction program for new administrators and staff. • Develops strategies for: o Retaining high-performing educators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of all administrators and staff.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	Engages with the district leadership team to: • Design and implement an induction program for new educators. • Develop strategies for retaining high-performing educators. • Develop strategies for fostering leadership skills in the most effective educators and administrators based on student outcomes. • Supports the development of all administrators utilizing a variety of methods.

Staff and Personnel Relationships	Score	Comments
95% of Certified Positions will be staffed by the 10th day of each year.	3	
90% of new teachers will be retained each year.	3	
Employee retention rates will exceed 85% each school year.	3	
Collaborates with administrators to induct, support, retain, and grow effective educators based on evidence of student outcomes.	2.5	
Develops appropriate structures to address staff morale based on district analysis.	3	Morale at some schools is Pretty low - mainly due to discipline
Provides shared leadership and decision-making opportunities for staff that promotes a climate of collaboration and collegiality.	2.5	see above ↑
Identifies and applies appropriate policies, criteria and processes for the recruitment, selection, induction, compensation, and separation of personnel.	3	
Evaluates the organizational structure of the district and reorganizes as necessary to achieve maximum effectiveness.	3	

TOTAL SCORE: 23

Integrity, Fairness, and Ethics Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provide samples of meetings and engagement with various stakeholders throughout the community. • Examples of meeting with teachers, staff, student groups, etc. outside of formal observations or staff meetings. • Examples of procedures that relate to communication plan for both certified and noncertified staff.	• Does not engage or limits engagement of stakeholder groups and does not seek input or feedback on district improvement. • Does not communicate expected values and beliefs to all staff. • Does not design or implement structures that increase shared ownership in district success. • Fails to establish high expectations for administrators' individual responsibility for district success.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Develops structures to encourage all stakeholders to provide input and feedback in district improvement decisions. • Communicates basic values and beliefs to all staff. • Models a commitment to the possibility of success for all students. • Designs and/or implements structures to increase shared ownership in district success. • Clearly and consistently communicates high expectations for administrators' individual responsibility for district success.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Develops capacity of administrators to implement structures for engaging all stakeholders to provide input and feedback in district improvement decisions. • Clearly communicates basic values and beliefs to all staff. • Enacts procedures that reflect a district-wide commitment to student success. • Clearly and consistently communicates administrators' individual responsibility for district success. Establishes a culture where all administrators address low expectations about student potential.

Integrity, Fairness, and Ethics	Score	Comments
Includes a varied set of administrators, educators, and stakeholders in district and school improvement decisions.	3	
Models and communicates expectations for individual and shared ownership of student, educator, school, and district success.	2	Sometimes expectations are not communicated in direct terms
Expects and emphasizes that all staff demonstrate integrity and exercise ethical behavior throughout the district.	4	
Treats people fairly, equally, and with dignity and respect.	5	

TOTAL SCORE: 14

Facilities and Safety Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school safety plans and/or school climate surveys. • Annual school level reporting of attendance rates and discipline referrals, including suspension and expulsion rates. • School district/county audits. • Examples of administrative procedures addressing finance and facilities.	• Expectations for resource allocation are not clearly aligned with the school district vision, mission, and goals. • District policies are not: o Clearly communicated. o Implemented consistently and fairly. o Related to students' safety. • Inadequate support for administrators to: o Analyze behavioral data to assess intervention and discipline effectiveness. • Use of data to adjust routines to maximize learning and decrease distractions.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Expectations for resource allocation are aligned with school district vision, mission, and goals. • District policies are: o Clearly communicated o Implemented consistently and fairly o Related to students' safety • Establishes practices that support: o Analyzing behavioral data to assess interventions and discipline effectiveness. o Use of data to adjust routines to maximize learning and decrease distractions. • Sufficient evidence that ensures administrators are adhering to expectations established in Board policy.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements ensures administrators: • Help set expectations for the learning environment and facilities that aligned with the school district vision, mission, and goals. • Review behavioral and discipline data to assess the effectiveness of interventions, adjusting when needed to ensure a safe learning environment.

Facilities/Safety	Score	Comments
Fosters a safe, respectful, and orderly learning environment for all.	2	Discipline is a problem
Demonstrates knowledge of school facilities and develops a process that builds public support for facility needs, including capital improvements.	4	
Ensures the maintenance of school property and the safety of personnel and property.	3	

TOTAL SCORE: 9

District Management Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Director of Schools self-evaluation. • District's instructional and student supports plan along with professional development plans. • Summary as to what degree the district and schools met previous year's performance targets. • Artifacts of the district's performance aligned to state standards and accountability model. • Nature, extent, and frequency of concerns voiced by the Board regarding management level personnel	Rarely or never improves self-practice by: • Using feedback from sources to reflect on personal leadership practices and does not make any necessary changes for improvement. • Engaging in professional learning: o Aligned to student, educator, and self-need. o Focused on developing an understanding of performance expectations associated with state standards. • Implementing new, relevant learning from feedback and professional learning opportunities	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from a variety of sources to reflect on personal leadership practices and make any necessary changes for improvement. • Engages in professional learning aligned to student, educator, and self-need. • Develops an understanding of performance expectations associated with Tennessee Instructional Leader Standards. • Implements new, relevant learning from feedback and professional learning opportunities with evidence of improvement.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Actively seeks feedback from a variety of sources to reflect on personal leadership practices and makes any necessary changes for improvement. • Connects personal leadership practices to student achievement and administrator and educator performance by sharing his/her performance evaluation results with district staff. • Reflects on leadership alignment with core value and the Board's vision, mission, and goals.

District Management	Score	Comments
Ensures operational plans and procedures to achieve the vision, mission, and goals are in place.	4	
Identifies, confronts, and resolves problems in a timely manner.	4	
Recognizes, studies, and applies emerging trends as appropriate.	3	
Uses effective communication skills.	4	
Guides and directs upper-level district management in the performance of their job duties, accepts constructive criticism from the Board regarding same, and takes responsibility where appropriate.	3	

TOTAL SCORE: 18

Director of Schools Overall Evaluation Score

Total Mean Score Strategic Planning	21	3.1
Total Mean Score Student Achievement/Performance	25.5	2.8
Total Mean Score School Leadership	21.5	3.1
Total Mean Score Community Relationships	5.5	2.8
Total Mean Score Post-Secondary Opportunities		0.0
Total Mean Score Business and Finance	14	2.8
Total Mean Score Board Relationship	16	3.2
Total Mean Score Staff and Personnel Relationships	23	2.9
Total Mean Score Integrity, Fairness, and Ethics	14	3.5
Total Mean Score Facilities/Safety	9	3.0
Total Mean Score District Management	18	3.6
Overall Mean Evaluation Score	167.5	3.1

Steve Slater
Print Name

Steve Slater
Signature

11-12-25
Date

Hamilton County Board of Education

Evaluation Model for the Director of Hamilton County Schools

Tennessee law requires the Hamilton County Board of Education to assign to the Director of Schools the day-to-day responsibility of operating the system within the approved budget and consistent with law and policy. Consequently, the selection and evaluation of the Director is one of the most important functions the Board of Education performs.

In order to fulfill its statutory obligations, and so the Director may have clear guidance regarding the Board's evaluation of his/her performance, the Board of Education, in consultation with the Director, has developed this Evaluation Model for the 2025-2026 school year. The foundation of this Evaluation Model is the Board's Strategic Plan, including corresponding annual goals; the laws of the State of Tennessee; and the Board's contract with the Director.

This Model will consist of three parts:

- **The Director's self-evaluation.**
  - **The Director will evaluate his/her own performance as well as the performance of the system using the criteria set forth below.**
  - **The Director will submit his/her self-evaluation to the Chair of the Board within 30 days of receipt of the State's annual assessment data of Hamilton County Schools.**
- **The Board's evaluation of the Director's performance.**
  - **The Board will evaluate the Director and the system using the criteria set forth below, the Director's self-evaluation, and the State's assessment data.**
  - **Each Board member will complete his or her evaluation within 30 days of receipt of the Director's self-evaluation and submit it to the Board secretary and the Board attorney.**
- **The Director's written response to the Board's evaluation.**

The Director and the Board will use the following Rating Scale:

1 = Significantly below expectations
2 = Below expectations
3 = At expectations
4 = Above expectations
5 = Significantly above expectations

Strategic Planning Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Agendas from district leadership and principal professional development. • District and school level goals for professional development related to student achievement, gap closure, college-career readiness, and growth. • District and School Improvement Plans that operationalize Opportunity 2030	Builds limited or no capacity for: • Developing administrators' understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to build administrator capacity.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Builds capacity among administrators for: • Developing an accurate understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources and instructional programs. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to improve instruction.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Communicates Opportunity 2030 to all staff. • Ensures the Board's vision, mission, and goals shape the educational programs, plans, and activities. • Actively monitors, evaluates, advises, and regularly updates the Board on Opportunity 2030

Strategic Planning	Score	Comments
Develop and implement Opportunity 2030 in collaboration with the school board to address key performance indicators on a yearly basis.	**3**	
Initiates communication and facilitates cooperation and collaboration among staff regarding Opportunity 2030.	**4**	
Keeps the Board and community informed of progress towards goals set in Opportunity 2030.	**3**	
Ensures the vision shapes the educational programs, plans, and activities of the district.	**3**	
Uses assessment data related to student learning to effectuate the Board's strategic plan.	**3**	
Leads the Board in recasting or reframing the vision as necessary based upon available data.	**3**	

TOTAL SCORE: **19**

Student Assessment/Performance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Sample of school and district improvement plans with strategies. • District and school level TVAAS scores. • Data summary of all district and school level accountability metrics. • Performance and monitoring data of district wide sub-groups. • District plan for monitoring school improvement plans and student academic performance. • Review of district report card.	Shows limited or no use of: • Multiple student, educator, school-wide, and district-wide data. • Specific data when analyzing and tracking student progress. • Academic and behavioral growth goals. • Expectations for adjusting instructional programs based on data. • Shared accountability for decisions targeting student achievement and growth goals. • No observable alignment between interventions and student achievement. • Planning that addresses academic growth goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Collaborates with administrators to: • Use multiple sources of student, educator, school and district-wide data. • Determine specific data to analyze when tracking student progress. • Establish specific strategies to meet or exceed academic and behavioral growth goals. • Communicate expectations for adjusting instruction programs in response to assessment data. • Establish shared accountability for instructional decisions targeting student achievement and growth goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Ensures administrators analyze and use multiple sources of student, educator, school and district-wide data. • Develops and monitors a district-wide data plan that includes: student progress tracking; strategies to meet or exceed growth and achievement goals; benchmark data; and data based changes to the instructional program. • Shared accountability for instructional decisions targeting achievement and growth goals. Establishes data-specific growth and achievement targets that result in gains

Student Achievement/Performance	Score	Comments
District Wide Value-Added will meet or exceed the State expectations each year.	**3**	
The percentage of students scoring below the 25th percentile will decrease by 2% each year.		
Collaborates with administrators to analyze and use multiple forms of data throughout the year to establish specific goals and strategies targeting student achievement and growth.	**4**	
Develops, monitors, and assesses district and school improvement plans, including the regular review and analysis of district test scores by school and sub-groups.	**4**	
Leads administrators to develop and execute interventions that address all student learning needs based on multiple sources of data.	**3**	
Applies and communicates qualitative and quantitative findings to identify strengths and weaknesses in programs and practices in order to ensure continuous improvement.	**3**	**If this is happening on a regular basis, I would love to better understand how this is being communicated and at which intervals.**
Establishes systems for principals to regularly receive feedback on goal achievement and to assess ongoing school improvement efforts.	**3**	
Encourages various staffing patterns, student grouping plans, class scheduling plans, school organizational structures, and facilities design processes to support various teaching strategies and desired student outcomes.	**3**	
Increase Graduation Rate with a goal of reaching 90% within the next 4 years.	**5**	

TOTAL SCORE: **28**

School Leadership Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• District leadership team meeting agendas and notes. • School level summary of principal use of data in determining staffing needs and placement. • Summary of school level use of teacher effectiveness data and teacher leaders. • Samples of staff and student recognition events at each school. • Nature, extent, and frequency of complaints or concerns voiced about subordinates within chain of command.	• Limited or no assignment of administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Limited or no opportunities to extend impact of high-performing teachers. • Clear criteria for recognition and celebration of schools and student performance and growth. • Shows limited or no use of the evaluation process and does not meet with administrators. • Repeated complaints or concerns being raised within chain of command, to include the Board.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Assigns administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Provides opportunities to extend impact of high performing teachers and administrators. • Creates and implements clear criteria for recognition of schools and students. • Ensures administrators provide structured feedback and use the evaluation process for professional learning and growth. • Uses evaluation data to determine trends.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Engages with administrators to review multiple data sources. • Creates a coherent system to extend impact of administrators. • Supports school rituals, traditions, and initiatives. • Builds and sustains a focused on continuous improvement. Creates a district-wide plan for professional learning aligned to the Board's vision for professional learning and growth.

School Leadership	Score	Comments
Develop competent leadership at the district level and school level through intentional leadership pipelines.	**4**	
Leverages administrators' strengths to engage all students in meaningful, relevant learning opportunities while ensuring employees are accountable for job responsibilities.	**4**	
Knowledgeable about the curriculum and establishes clear expectations for administrators.	**3**	
Supports professional learning activities for teachers and administrators.	**3**	
Uses administrator evaluation data to inform, assess, and adjust professional learning, goals, and plans.	**4**	
Demonstrates use of system and staff evaluation data for personnel policies, decision-making, promotion of career growth, and professional development.	**4**	
Offers professional development that is focused on student learning consistent with the school district's vision, mission, and goals.	**4**	

TOTAL SCORE: **26**

Community Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school district level website, newsletters, and surveys if available. • Examples of meeting agendas and schedules for parental involvement and community engagement. • Samples of school partnerships and partnership activities. • Samples of meetings and conversations with community partners and educators. • Donations and contributions to each school or the district.	Shows limited or no evidence of: • Welcoming and engaging families. • Offering timely, relevant, and accessible communication. • Providing district staff with sufficient resources needed to communicate regularly with families. • Creating flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Assessing community partners and resources. • Allocating fiscal, human, technological, and physical resources or allocates these with misalignment to the Board's vision, mission, and goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Welcomes and engages all families. • Offers opportunities for families to participate in school initiatives when applicable. • Provides district staff with sufficient resources needed to communicate regularly with families. • Creates flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Conducts an accurate assessment of community partners and resources. • Ensures accepted resources support the Board's vision, mission, and goals. • Allocates fiscal, human, technological, and physical resources to align with the Board's vision, mission, and goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements: • Establishes a two-way communication process for families that provides information about student progress and learning. • Supports family and community partnerships that are visible and sustainable. • Assesses potential community partners and secures additional resources that support the district. Highlights usage of resources and shares district accomplishments by regularly communicating with community partners.

Community Relationships	Score	Comments
Identifies multiple points of view for problem solving situations and involves stakeholders in decisions affecting the district.	**3**	
Strategically utilizes community resources and established partnerships to support the Board's vision, mission, and goals.	**4**	

TOTAL SCORE: **7**

Business and Finance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of compliance with all financial audits including local, state, and federal. • Provide samples of both student and employee handbooks. • Provide samples of meeting with certified and noncertified staff on compliance with all Board policies and operating procedures. • Provide sample administrative procedures aligned with Board policy, state law, and federal requirements. • Board work session reports and agenda documents showing budgeting aligned with priorities.	• Rarely or never establishes, communicates, and enforces administrative procedures by: ○ Aligning them with Board policy, state law, and federal requirements. ○ Communicating established administrative procedures. ○ Ensuring administrators are accountable to the administrative procedures. • Rarely or never performs all budgetary responsibilities by: ○ Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Establishes, communicates, and enforces administrative procedures by: ○ Aligning them with Board policy, state law, and federal requirements. ○ Communicating established administrative procedures. ○ Ensuring administrators are accountable to the administrative procedures. • Performs timely, accurate, and transparent budgetary responsibilities by: ○ Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Leads administrators and staff in frequent reviews of administrative procedures to vet effectiveness and ensure the effective and efficient operation of the school district. • Leads administrators in frequent reviews of fiscal resource allocation to support the effective and efficient operation of the district.

Business and Finance	Score	Comments
Budget will be presented on time and in a transparent manner to both the board and community	**4**	
Steps will be articulated and implemented to ensure school leaders are resourced to address unique needs of every school.	**3**	
Demonstrates budget management including financial forecasting, planning, cashflow management, account auditing, and monitoring and oversees the district's fiduciary responsibilities.	**4**	**This is an area I feel we are improving upon, particularly within the realm of health insurance.**
Provides accurate and timely reports to the Board on the financial condition of the school system.	**4**	
Meets and works collaboratively with the Board and appropriate staff to determine budget priorities, including alignment with strategy and the effective allocation of resources.	**4**	

TOTAL SCORE: **19**

Board Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provides supporting documentation for each section of the director's evaluation instrument. • Samples of administrative procedures that adhere with Board policy.	• Inconsistently uses feedback from the Board to improve and demonstrates little evidence of growth. • Unprepared or disengaged with the Board and professional learning opportunities. • Engages in the evaluation process without evidence of focus on continuous improvement. • Self-reflections do not match the expectations of the Board of the director's evaluation instrument. • Inconsistently contributes to school district growth by failing to assist and mentor administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from the Board to implement personal and professional improvement strategies. • Prepared and engaged with the Board and professional learning opportunities. • Engages in the evaluation process with evidence of focus on improvement. • Contributes to the school district by assisting others, including at least two of the following. o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively participating in professional learning. • Building capacity for aspiring administrators.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Uses feedback from the Board to significantly improve performance. • Consistently prepared and highly engaged with the Board and in professional learning opportunities. • Engages in the evaluation process and seeks out feedback, matching the expectations of the Board and director's evaluation instrument. • Actively and consistently contributes to the school district by assisting and/or mentoring others, including: o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively leading professional learning. o Leading data-driven professional learning opportunities. o Building capacity for aspiring administrators.

Board Relationship	Score	Comments
Keeps board members informed on issues, needs, and operation of the school system.	**3**	
Follows through on initiatives and strategies communicated to the Board of Education	**3**	
Seeks and accepts constructive criticism of work from the Board	**4**	
Interprets and executes the intent of Board policy through the development of administrative procedures	**3**	
Maintains/improves relations with the Board by consistent and appropriate interpersonal/professional interactions while making appropriate recommendations based on thorough analysis and study.	**4**	

TOTAL SCORE: **17**

Staff and Personnel Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of district level plan for recruiting both professional and noncertified staff. • Samples of school level data regarding induction, support, retention, and growth of staff. • Samples of school level plans to increase the rates of high-performing educators and increase retention rates.	• Rarely or never inducts, supports, retains, and grows administrators by designing and implementing an induction program for new administrators and staff. • Rarely or never develops strategies for: o Retaining high-performing educators and administrators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Designs and implements an induction program for new administrators and staff. • Develops strategies for: o Retaining high-performing educators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of all administrators and staff.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	Engages with the district leadership team to: • Design and implement an induction program for new educators. • Develop strategies for retaining high-performing educators. • Develop strategies for fostering leadership skills in the most effective educators and administrators based on student outcomes. • Supports the development of all administrators utilizing a variety of methods.

Staff and Personnel Relationships	Score	Comments
95% of Certified Positions will be staffed by the 10th day of each year.	**4**	
90% of new teachers will be retained each year.	**4**	
Employee retention rates will exceed 85% each school year.	**4**	
Collaborates with administrators to induct, support, retain, and grow effective educators based on evidence of student outcomes.	**4**	
Develops appropriate structures to address staff morale based on district analysis.	**4**	
Provides shared leadership and decision-making opportunities for staff that promotes a climate of collaboration and collegiality.	**4**	
Identifies and applies appropriate policies, criteria and processes for the recruitment, selection, induction, compensation, and separation of personnel.	**4**	
Evaluates the organizational structure of the district and reorganizes as necessary to achieve maximum effectiveness.	**3**	**I'd like to see more discussion around this, particularly as we enter into budget season**

TOTAL SCORE: **31**

Integrity, Fairness, and Ethics Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provide samples of meetings and engagement with various stakeholders throughout the community. • Examples of meeting with teachers, staff, student groups, etc. outside of formal observations or staff meetings. • Examples of procedures that relate to communication plan for both certified and noncertified staff.	• Does not engage or limits engagement of stakeholder groups and does not seek input or feedback on district improvement. • Does not communicate expected values and beliefs to all staff. • Does not design or implement structures that increase shared ownership in district success. • Fails to establish high expectations for administrators' individual responsibility for district success.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Develops structures to encourage all stakeholders to provide input and feedback in district improvement decisions. • Communicates basic values and beliefs to all staff. • Models a commitment to the possibility of success for all students. • Designs and/or implements structures to increase shared ownership in district success. • Clearly and consistently communicates high expectations for administrators' individual responsibility for district success.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Develops capacity of administrators to implement structures for engaging all stakeholders to provide input and feedback in district improvement decisions. • Clearly communicates basic values and beliefs to all staff. • Enacts procedures that reflect a district-wide commitment to student success. • Clearly and consistently communicates administrators' individual responsibility for district success. Establishes a culture where all administrators address low expectations about student potential.

Integrity, Fairness, and Ethics	Score	Comments
Includes a varied set of administrators, educators, and stakeholders in district and school improvement decisions.	**4**	
Models and communicates expectations for individual and shared ownership of student, educator, school, and district success.	**4**	
Expects and emphasizes that all staff demonstrate integrity and exercise ethical behavior throughout the district.	**4**	
Treats people fairly, equally, and with dignity and respect.	**4**	

TOTAL SCORE: **16**

Facilities and Safety Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school safety plans and/or school climate surveys. • Annual school level reporting of attendance rates and discipline referrals, including suspension and expulsion rates. • School district/county audits. • Examples of administrative procedures addressing finance and facilities.	• Expectations for resource allocation are not clearly aligned with the school district vision, mission, and goals. • District policies are not: o Clearly communicated. o Implemented consistently and fairly. o Related to students' safety. • Inadequate support for administrators to: o Analyze behavioral data to assess intervention and discipline effectiveness. • Use of data to adjust routines to maximize learning and decrease distractions.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Expectations for resource allocation are aligned with school district vision, mission, and goals. • District policies are: o Clearly communicated o Implemented consistently and fairly o Related to students' safety • Establishes practices that support: o Analyzing behavioral data to assess interventions and discipline effectiveness. o Use of data to adjust routines to maximize learning and decrease distractions. • Sufficient evidence that ensures administrators are adhering to expectations established in Board policy.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements ensures administrators: • Help set expectations for the learning environment and facilities that aligned with the school district vision, mission, and goals. • Review behavioral and discipline data to assess the effectiveness of interventions, adjusting when needed to ensure a safe learning environment.

Facilities/Safety	Score	Comments
Fosters a safe, respectful, and orderly learning environment for all.	**4**	
Demonstrates knowledge of school facilities and develops a process that builds public support for facility needs, including capital improvements.	**5**	
Ensures the maintenance of school property and the safety of personnel and property.	**5**	

TOTAL SCORE: **14**

District Management Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Director of Schools self-evaluation. • District's instructional and student supports plan along with professional development plans. • Summary as to what degree the district and schools met previous year's performance targets. • Artifacts of the district's performance aligned to state standards and accountability model. • Nature, extent, and frequency of concerns voiced by the Board regarding management level personnel	Rarely or never improves self-practice by: • Using feedback from sources to reflect on personal leadership practices and does not make any necessary changes for improvement. • Engaging in professional learning: ○ Aligned to student, educator, and self-need. ○ Focused on developing an understanding of performance expectations associated with state standards. • Implementing new, relevant learning from feedback and professional learning opportunities	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from a variety of sources to reflect on personal leadership practices and make any necessary changes for improvement. • Engages in professional learning aligned to student, educator, and self-need. • Develops an understanding of performance expectations associated with Tennessee Instructional Leader Standards. • Implements new, relevant learning from feedback and professional learning opportunities with evidence of improvement.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Actively seeks feedback from a variety of sources to reflect on personal leadership practices and makes any necessary changes for improvement. • Connects personal leadership practices to student achievement and administrator and educator performance by sharing his/her performance evaluation results with district staff. • Reflects on leadership alignment with core value and the Board's vision, mission, and goals.

District Management	Score	Comments
Ensures operational plans and procedures to achieve the vision, mission, and goals are in place.	**4**	
Identifies, confronts, and resolves problems in a timely manner.	**4**	
Recognizes, studies, and applies emerging trends as appropriate.	**4**	
Uses effective communication skills.	**3**	
Guides and directs upper-level district management in the performance of their job duties, accepts constructive criticism from the Board regarding same, and takes responsibility where appropriate.	**4**	

TOTAL SCORE: **19**

Director of Schools Overall Evaluation Score

Total Mean Score Strategic Planning	3.2
Total Mean Score Student Achievement/Performance	3.1
Total Mean Score School Leadership	3.7
Total Mean Score Community Relationships	3.5
Total Mean Score Post-Secondary Opportunities	0.0
Total Mean Score Business and Finance	3.8
Total Mean Score Board Relationship	3.4
Total Mean Score Staff and Personnel Relationships	3.9
Total Mean Score Integrity, Fairness, and Ethics	4.0
Total Mean Score Facilities/Safety	4.7
Total Mean Score District Management	3.8
Overall Mean Evaluation Score	3.6

Ben Daugherty
Print Name

Signature

12/01/2025
Date

Hamilton County Board of Education

Evaluation Model for the Director of Hamilton County Schools

Tennessee law requires the Hamilton County Board of Education to assign to the Director of Schools the day-to-day responsibility of operating the system within the approved budget and consistent with law and policy. Consequently, the selection and evaluation of the Director is one of the most important functions the Board of Education performs.

In order to fulfill its statutory obligations, and so the Director may have clear guidance regarding the Board's evaluation of his/her performance, the Board of Education, in consultation with the Director, has developed this Evaluation Model for the 2025-2026 school year. The foundation of this Evaluation Model is the Board's Strategic Plan, including corresponding annual goals; the laws of the State of Tennessee; and the Board's contract with the Director.

This Model will consist of three parts:

- **The Director's self-evaluation.**
  - **The Director will evaluate his/her own performance as well as the performance of the system using the criteria set forth below.**
  - **The Director will submit his/her self-evaluation to the Chair of the Board within 30 days of receipt of the State's annual assessment data of Hamilton County Schools.**
- **The Board's evaluation of the Director's performance.**
  - **The Board will evaluate the Director and the system using the criteria set forth below, the Director's self-evaluation, and the State's assessment data.**
  - **Each Board member will complete his or her evaluation within 30 days of receipt of the Director's self-evaluation and submit it to the Board secretary and the Board attorney.**
- **The Director's written response to the Board's evaluation.**

The Director and the Board will use the following Rating Scale:

1 = Significantly below expectations
2 = Below expectations
3 = At expectations
4 = Above expectations
5 = Significantly above expectations

JOE SMITH
DISTRICT - 3

Strategic Planning Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Agendas from district leadership and principal professional development. • District and school level goals for professional development related to student achievement, gap closure, college-career readiness, and growth. • District and School Improvement Plans that operationalize Opportunity 2030	Builds limited or no capacity for: • Developing administrators' understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to build administrator capacity.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Builds capacity among administrators for: • Developing an accurate understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources and instructional programs. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to improve instruction.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Communicates Opportunity 2030 to all staff. • Ensures the Board's vision, mission, and goals shape the educational programs, plans, and activities. • Actively monitors, evaluates, advises, and regularly updates the Board on Opportunity 2030

Strategic Planning	Score	Comments
Develop and implement Opportunity 2030 in collaboration with the school board to address key performance indicators on a yearly basis.	4.5	
Initiates communication and facilitates cooperation and collaboration among staff regarding Opportunity 2030.	4.5	
Keeps the Board and community informed of progress towards goals set in Opportunity 2030.	4.0	
Ensures the vision shapes the educational programs, plans, and activities of the district.	4.0	
Uses assessment data related to student learning to effectuate the Board's strategic plan.	4.5	
Leads the Board in recasting or reframing the vision as necessary based upon available data.	4.0	

TOTAL SCORE: 4.25

Student Assessment/Performance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Sample of school and district improvement plans with strategies. • District and school level TVAAS scores. • Data summary of all district and school level accountability metrics. • Performance and monitoring data of district wide sub-groups. • District plan for monitoring school improvement plans and student academic performance. • Review of district report card.	Shows limited or no use of: • Multiple student, educator, school-wide, and district-wide data. • Specific data when analyzing and tracking student progress. • Academic and behavioral growth goals. • Expectations for adjusting instructional programs based on data. • Shared accountability for decisions targeting student achievement and growth goals. • No observable alignment between interventions and student achievement. • Planning that addresses academic growth goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Collaborates with administrators to: • Use multiple sources of student, educator, school and district-wide data. • Determine specific data to analyze when tracking student progress. • Establish specific strategies to meet or exceed academic and behavioral growth goals. • Communicate expectations for adjusting instruction programs in response to assessment data. • Establish shared accountability for instructional decisions targeting student achievement and growth goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Ensures administrators analyze and use multiple sources of student, educator, school and district-wide data. • Develops and monitors a district-wide data plan that includes: student progress tracking; strategies to meet or exceed growth and achievement goals; benchmark data; and data based changes to the instructional program. • Shared accountability for instructional decisions targeting achievement and growth goals. Establishes data-specific growth and achievement targets that result in gains

Student Achievement/Performance	Score	Comments
District Wide Value-Added will meet or exceed the State expectations each year.	4.0	
The percentage of students scoring below the 25th percentile will decrease by 2% each year.	3.0	
Collaborates with administrators to analyze and use multiple forms of data throughout the year to establish specific goals and strategies targeting student achievement and growth.	4.8	
Develops, monitors, and assesses district and school improvement plans, including the regular review and analysis of district test scores by school and sub-groups.	4.8	
Leads administrators to develop and execute interventions that address all student learning needs based on multiple sources of data.	3.5	
Applies and communicates qualitative and quantitative findings to identify strengths and weaknesses in programs and practices in order to ensure continuous improvement.	3.9	
Establishes systems for principals to regularly receive feedback on goal achievement and to assess ongoing school improvement efforts.	4.5	
Encourages various staffing patterns, student grouping plans, class scheduling plans, school organizational structures, and facilities design processes to support various teaching strategies and desired student outcomes.	4.5	
Increase Graduation Rate with a goal of reaching 90% within the next 4 years.	5.0	

TOTAL SCORE: 4.20

School Leadership Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• District leadership team meeting agendas and notes. • School level summary of principal use of data in determining staffing needs and placement. • Summary of school level use of teacher effectiveness data and teacher leaders. • Samples of staff and student recognition events at each school. • Nature, extent, and frequency of complaints or concerns voiced about subordinates within chain of command.	• Limited or no assignment of administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Limited or no opportunities to extend impact of high-performing teachers. • Clear criteria for recognition and celebration of schools and student performance and growth. • Shows limited or no use of the evaluation process and does not meet with administrators. • Repeated complaints or concerns being raised within chain of command, to include the Board.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Assigns administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Provides opportunities to extend impact of high performing teachers and administrators. • Creates and implements clear criteria for recognition of schools and students. • Ensures administrators provide structured feedback and use the evaluation process for professional learning and growth. • Uses evaluation data to determine trends.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Engages with administrators to review multiple data sources. • Creates a coherent system to extend impact of administrators. • Supports school rituals, traditions, and initiatives. • Builds and sustains a focused on continuous improvement. Creates a district-wide plan for professional learning aligned to the Board's vision for professional learning and growth.

School Leadership	Score	Comments
Develop competent leadership at the district level and school level through intentional leadership pipelines.	4.0	
Leverages administrators' strengths to engage all students in meaningful, relevant learning opportunities while ensuring employees are accountable for job responsibilities.	4.8	
Knowledgeable about the curriculum and establishes clear expectations for administrators.	4.8	
Supports professional learning activities for teachers and administrators.	5.0	
Uses administrator evaluation data to inform, assess, and adjust professional learning, goals, and plans.	4.5	
Demonstrates use of system and staff evaluation data for personnel policies, decision-making, promotion of career growth, and professional development.	4.5	
Offers professional development that is focused on student learning consistent with the school district's vision, mission, and goals.	4.5	

TOTAL SCORE: 4.60

Community Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school district level website, newsletters, and surveys if available. • Examples of meeting agendas and schedules for parental involvement and community engagement. • Samples of school partnerships and partnership activities. • Samples of meetings and conversations with community partners and educators. • Donations and contributions to each school or the district.	Shows limited or no evidence of: • Welcoming and engaging families. • Offering timely, relevant, and accessible communication. • Providing district staff with sufficient resources needed to communicate regularly with families. • Creating flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Assessing community partners and resources. • Allocating fiscal, human, technological, and physical resources or allocates these with misalignment to the Board's vision, mission, and goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Welcomes and engages all families. • Offers opportunities for families to participate in school initiatives when applicable. • Provides district staff with sufficient resources needed to communicate regularly with families. • Creates flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Conducts an accurate assessment of community partners and resources. • Ensures accepted resources support the Board's vision, mission, and goals. • Allocates fiscal, human, technological, and physical resources to align with the Board's vision, mission, and goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements: • Establishes a two-way communication process for families that provides information about student progress and learning. • Supports family and community partnerships that are visible and sustainable. • Assesses potential community partners and secures additional resources that support the district. Highlights usage of resources and shares district accomplishments by regularly communicating with community partners.

Community Relationships	Score	Comments
Identifies multiple points of view for problem solving situations and involves stakeholders in decisions affecting the district.	4.8	
Strategically utilizes community resources and established partnerships to support the Board's vision, mission, and goals.	4.8	

TOTAL SCORE: 4.80

Business and Finance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of compliance with all financial audits including local, state, and federal. • Provide samples of both student and employee handbooks. • Provide samples of meeting with certified and noncertified staff on compliance with all Board policies and operating procedures. • Provide sample administrative procedures aligned with Board policy, state law, and federal requirements. • Board work session reports and agenda documents showing budgeting aligned with priorities.	• Rarely or never establishes, communicates, and enforces administrative procedures by: o Aligning them with Board policy, state law, and federal requirements. o Communicating established administrative procedures. o Ensuring administrators are accountable to the administrative procedures. • Rarely or never performs all budgetary responsibilities by: o Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Establishes, communicates, and enforces administrative procedures by: o Aligning them with Board policy, state law, and federal requirements. o Communicating established administrative procedures. o Ensuring administrators are accountable to the administrative procedures. • Performs timely, accurate, and transparent budgetary responsibilities by: o Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Leads administrators and staff in frequent reviews of administrative procedures to vet effectiveness and ensure the effective and efficient operation of the school district. • Leads administrators in frequent reviews of fiscal resource allocation to support the effective and efficient operation of the district.

Business and Finance	Score	Comments
Budget will be presented on time and in a transparent manner to both the board and community	4.8	
Steps will be articulated and implemented to ensure school leaders are resourced to address unique needs of every school.	4.8	
Demonstrates budget management including financial forecasting, planning, cashflow management, account auditing, and monitoring and oversees the district's fiduciary responsibilities.	4.0	
Provides accurate and timely reports to the Board on the financial condition of the school system.	4.5	
Meets and works collaboratively with the Board and appropriate staff to determine budget priorities, including alignment with strategy and the effective allocation of resources.	4.5	
TOTAL SCORE:	4.50	

Board Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provides supporting documentation for each section of the director's evaluation instrument. • Samples of administrative procedures that adhere with Board policy.	• Inconsistently uses feedback from the Board to improve and demonstrates little evidence of growth. • Unprepared or disengaged with the Board and professional learning opportunities. • Engages in the evaluation process without evidence of focus on continuous improvement. • Self-reflections do not match the expectations of the Board of the director's evaluation instrument. • Inconsistently contributes to school district growth by failing to assist and mentor administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from the Board to implement personal and professional improvement strategies. • Prepared and engaged with the Board and professional learning opportunities. • Engages in the evaluation process with evidence of focus on improvement. • Contributes to the school district by assisting others, including at least two of the following. o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively participating in professional learning. • Building capacity for aspiring administrators.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Uses feedback from the Board to significantly improve performance. • Consistently prepared and highly engaged with the Board and in professional learning opportunities. • Engages in the evaluation process and seeks out feedback, matching the expectations of the Board and director's evaluation instrument. • Actively and consistently contributes to the school district by assisting and/or mentoring others, including: o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively leading professional learning. o Leading data-driven professional learning opportunities. o Building capacity for aspiring administrators.

Board Relationship	Score	Comments
Keeps board members informed on issues, needs, and operation of the school system.	4.5	
Follows through on initiatives and strategies communicated to the Board of Education	4.8	
Seeks and accepts constructive criticism of work from the Board	3.0	
Interprets and executes the intent of Board policy through the development of administrative procedures	3.0	
Maintains/improves relations with the Board by consistent and appropriate interpersonal/professional interactions while making appropriate recommendations based on thorough analysis and study.	4.5	

TOTAL SCORE: 39.0

Staff and Personnel Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of district level plan for recruiting both professional and noncertified staff. • Samples of school level data regarding induction, support, retention, and growth of staff. • Samples of school level plans to increase the rates of high-performing educators and increase retention rates.	• Rarely or never inducts, supports, retains, and grows administrators by designing and implementing an induction program for new administrators and staff. • Rarely or never develops strategies for: o Retaining high-performing educators and administrators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Designs and implements an induction program for new administrators and staff. • Develops strategies for: o Retaining high-performing educators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of all administrators and staff.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	Engages with the district leadership team to: • Design and implement an induction program for new educators. • Develop strategies for retaining high-performing educators. • Develop strategies for fostering leadership skills in the most effective educators and administrators based on student outcomes. • Supports the development of all administrators utilizing a variety of methods.

Staff and Personnel Relationships	Score	Comments
95% of Certified Positions will be staffed by the 10th day of each year.	5.0	
90% of new teachers will be retained each year.	3.0	
Employee retention rates will exceed 85% each school year.	5.0	
Collaborates with administrators to induct, support, retain, and grow effective educators based on evidence of student outcomes.	4.2	
Develops appropriate structures to address staff morale based on district analysis.	4.2	
Provides shared leadership and decision-making opportunities for staff that promotes a climate of collaboration and collegiality.	4.0	
Identifies and applies appropriate policies, criteria and processes for the recruitment, selection, induction, compensation, and separation of personnel.	4.0	
Evaluates the organizational structure of the district and reorganizes as necessary to achieve maximum effectiveness.	3.5	

TOTAL SCORE: 4.10

Integrity, Fairness, and Ethics Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provide samples of meetings and engagement with various stakeholders throughout the community. • Examples of meeting with teachers, staff, student groups, etc. outside of formal observations or staff meetings. • Examples of procedures that relate to communication plan for both certified and noncertified staff.	• Does not engage or limits engagement of stakeholder groups and does not seek input or feedback on district improvement. • Does not communicate expected values and beliefs to all staff. • Does not design or implement structures that increase shared ownership in district success. • Fails to establish high expectations for administrators' individual responsibility for district success.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Develops structures to encourage all stakeholders to provide input and feedback in district improvement decisions. • Communicates basic values and beliefs to all staff. • Models a commitment to the possibility of success for all students. • Designs and/or implements structures to increase shared ownership in district success. • Clearly and consistently communicates high expectations for administrators' individual responsibility for district success.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Develops capacity of administrators to implement structures for engaging all stakeholders to provide input and feedback in district improvement decisions. • Clearly communicates basic values and beliefs to all staff. • Enacts procedures that reflect a district-wide commitment to student success. • Clearly and consistently communicates administrators' individual responsibility for district success. Establishes a culture where all administrators address low expectations about student potential.

Integrity, Fairness, and Ethics	Score	Comments
Includes a varied set of administrators, educators, and stakeholders in district and school improvement decisions.	4.2	
Models and communicates expectations for individual and shared ownership of student, educator, school, and district success.	4.5	
Expects and emphasizes that all staff demonstrate integrity and exercise ethical behavior throughout the district.	4.5	
Treats people fairly, equally, and with dignity and respect.	5.0	

TOTAL SCORE: 4.55

Facilities and Safety Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school safety plans and/or school climate surveys. • Annual school level reporting of attendance rates and discipline referrals, including suspension and expulsion rates. • School district/county audits. • Examples of administrative procedures addressing finance and facilities.	• Expectations for resource allocation are not clearly aligned with the school district vision, mission, and goals. • District policies are not: o Clearly communicated. o Implemented consistently and fairly. o Related to students' safety. • Inadequate support for administrators to: o Analyze behavioral data to assess intervention and discipline effectiveness. • Use of data to adjust routines to maximize learning and decrease distractions.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Expectations for resource allocation are aligned with school district vision, mission, and goals. • District policies are: o Clearly communicated o Implemented consistently and fairly o Related to students' safety • Establishes practices that support: o Analyzing behavioral data to assess interventions and discipline effectiveness. o Use of data to adjust routines to maximize learning and decrease distractions. • Sufficient evidence that ensures administrators are adhering to expectations established in Board policy.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements ensures administrators: • Help set expectations for the learning environment and facilities that aligned with the school district vision, mission, and goals. • Review behavioral and discipline data to assess the effectiveness of interventions, adjusting when needed to ensure a safe learning environment.

Facilities/Safety	Score	Comments
Fosters a safe, respectful, and orderly learning environment for all.	4.5	
Demonstrates knowledge of school facilities and develops a process that builds public support for facility needs, including capital improvements.	4.5	
Ensures the maintenance of school property and the safety of personnel and property.	3.5	

TOTAL SCORE: 4.15

District Management Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Director of Schools self-evaluation. • District's instructional and student supports plan along with professional development plans. • Summary as to what degree the district and schools met previous year's performance targets. • Artifacts of the district's performance aligned to state standards and accountability model. • Nature, extent, and frequency of concerns voiced by the Board regarding management level personnel	Rarely or never improves self-practice by: • Using feedback from sources to reflect on personal leadership practices and does not make any necessary changes for improvement. • Engaging in professional learning: ○ Aligned to student, educator, and self-need. ○ Focused on developing an understanding of performance expectations associated with state standards. • Implementing new, relevant learning from feedback and professional learning opportunities	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from a variety of sources to reflect on personal leadership practices and make any necessary changes for improvement. • Engages in professional learning aligned to student, educator, and self-need. • Develops an understanding of performance expectations associated with Tennessee Instructional Leader Standards. • Implements new, relevant learning from feedback and professional learning opportunities with evidence of improvement.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Actively seeks feedback from a variety of sources to reflect on personal leadership practices and makes any necessary changes for improvement. • Connects personal leadership practices to student achievement and administrator and educator performance by sharing his/her performance evaluation results with district staff. • Reflects on leadership alignment with core value and the Board's vision, mission, and goals.

District Management	Score	Comments
Ensures operational plans and procedures to achieve the vision, mission, and goals are in place.	4.2	
Identifies, confronts, and resolves problems in a timely manner.	4.0	
Recognizes, studies, and applies emerging trends as appropriate.	4.0	
Uses effective communication skills.	4.5	
Guides and directs upper-level district management in the performance of their job duties, accepts constructive criticism from the Board regarding same, and takes responsibility where appropriate.	4.0	

TOTAL SCORE: 4.10

Director of Schools Overall Evaluation Score

Total Mean Score Strategic Planning	4.75
Total Mean Score Student Achievement/Performance	4.20
Total Mean Score School Leadership	4.60
Total Mean Score Community Relationships	4.80
Total Mean Score Post-Secondary Opportunities	~~X~~
Total Mean Score Business and Finance	4.50
Total Mean Score Board Relationship	3.90
Total Mean Score Staff and Personnel Relationships	4.10
Total Mean Score Integrity, Fairness, and Ethics	4.55
Total Mean Score Facilities/Safety	4.15
Total Mean Score District Management	4.10
Overall Mean Evaluation Score	4.3

D K Joe Smith

Print Name

Joe Smith

Signature

12-1-25

Date

Hamilton County Board of Education

Evaluation Model for the Director of Hamilton County Schools

Tennessee law requires the Hamilton County Board of Education to assign to the Director of Schools the day-to-day responsibility of operating the system within the approved budget and consistent with law and policy. Consequently, the selection and evaluation of the Director is one of the most important functions the Board of Education performs.

In order to fulfill its statutory obligations, and so the Director may have clear guidance regarding the Board's evaluation of his/her performance, the Board of Education, in consultation with the Director, has developed this Evaluation Model for the 2025-2026 school year. The foundation of this Evaluation Model is the Board's Strategic Plan, including corresponding annual goals; the laws of the State of Tennessee; and the Board's contract with the Director.

This Model will consist of three parts:

- **The Director's self-evaluation.**
  - **The Director will evaluate his/her own performance as well as the performance of the system using the criteria set forth below.**
  - **The Director will submit his/her self-evaluation to the Chair of the Board within 30 days of receipt of the State's annual assessment data of Hamilton County Schools.**
- **The Board's evaluation of the Director's performance.**
  - **The Board will evaluate the Director and the system using the criteria set forth below, the Director's self-evaluation, and the State's assessment data.**
  - **Each Board member will complete his or her evaluation within 30 days of receipt of the Director's self-evaluation and submit it to the Board secretary and the Board attorney.**
- **The Director's written response to the Board's evaluation.**

The Director and the Board will use the following Rating Scale:

1 = Significantly below expectations
2 = Below expectations
3 = At expectations
4 = Above expectations
5 = Significantly above expectations

Strategic Planning Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Agendas from district leadership and principal professional development. • District and school level goals for professional development related to student achievement, gap closure, college-career readiness, and growth. • District and School Improvement Plans that operationalize Opportunity 2030	Builds limited or no capacity for: • Developing administrators' understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to build administrator capacity.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Builds capacity among administrators for: • Developing an accurate understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources and instructional programs. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to improve instruction.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Communicates Opportunity 2030 to all staff. • Ensures the Board's vision, mission, and goals shape the educational programs, plans, and activities. • Actively monitors, evaluates, advises, and regularly updates the Board on Opportunity 2030

Strategic Planning	Score	Comments
Develop and implement Opportunity 2030 in collaboration with the school board to address key performance indicators on a yearly basis.	**4**	
Initiates communication and facilitates cooperation and collaboration among staff regarding Opportunity 2030.	**5**	
Keeps the Board and community informed of progress towards goals set in Opportunity 2030.	**4**	
Ensures the vision shapes the educational programs, plans, and activities of the district.	**4**	
Uses assessment data related to student learning to effectuate the Board's strategic plan.	**4**	
Leads the Board in recasting or reframing the vision as necessary based upon available data.	**3**	

TOTAL SCORE: **____24_____**

Student Assessment/Performance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Sample of school and district improvement plans with strategies. • District and school level TVAAS scores. • Data summary of all district and school level accountability metrics. • Performance and monitoring data of district wide sub-groups. • District plan for monitoring school improvement plans and student academic performance. • Review of district report card.	Shows limited or no use of: • Multiple student, educator, school-wide, and district-wide data. • Specific data when analyzing and tracking student progress. • Academic and behavioral growth goals. • Expectations for adjusting instructional programs based on data. • Shared accountability for decisions targeting student achievement and growth goals. • No observable alignment between interventions and student achievement. • Planning that addresses academic growth goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Collaborates with administrators to: • Use multiple sources of student, educator, school and district-wide data. • Determine specific data to analyze when tracking student progress. • Establish specific strategies to meet or exceed academic and behavioral growth goals. • Communicate expectations for adjusting instruction programs in response to assessment data. • Establish shared accountability for instructional decisions targeting student achievement and growth goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Ensures administrators analyze and use multiple sources of student, educator, school and district-wide data. • Develops and monitors a district-wide data plan that includes: student progress tracking; strategies to meet or exceed growth and achievement goals; benchmark data; and data based changes to the instructional program. • Shared accountability for instructional decisions targeting achievement and growth goals. Establishes data-specific growth and achievement targets that result in gains

Student Achievement/Performance	Score	Comments
District Wide Value-Added will meet or exceed the State expectations each year.	**3**	
The percentage of students scoring below the 25th percentile will decrease by 2% each year.	**3**	
Collaborates with administrators to analyze and use multiple forms of data throughout the year to establish specific goals and strategies targeting student achievement and growth.	**5**	
Develops, monitors, and assesses district and school improvement plans, including the regular review and analysis of district test scores by school and sub-groups.	**5**	
Leads administrators to develop and execute interventions that address all student learning needs based on multiple sources of data.	**4**	
Applies and communicates qualitative and quantitative findings to identify strengths and weaknesses in programs and practices in order to ensure continuous improvement.	**3**	
Establishes systems for principals to regularly receive feedback on goal achievement and to assess ongoing school improvement efforts.	**4**	
Encourages various staffing patterns, student grouping plans, class scheduling plans, school organizational structures, and facilities design processes to support various teaching strategies and desired student outcomes.	**4**	
Increase Graduation Rate with a goal of reaching 90% within the next 4 years.	**5**	**Based on the Data achievement**

TOTAL SCORE: **___36-______**

School Leadership Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• District leadership team meeting agendas and notes. • School level summary of principal use of data in determining staffing needs and placement. • Summary of school level use of teacher effectiveness data and teacher leaders. • Samples of staff and student recognition events at each school. • Nature, extent, and frequency of complaints or concerns voiced about subordinates within chain of command.	• Limited or no assignment of administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Limited or no opportunities to extend impact of high-performing teachers. • Clear criteria for recognition and celebration of schools and student performance and growth. • Shows limited or no use of the evaluation process and does not meet with administrators. • Repeated complaints or concerns being raised within chain of command, to include the Board.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Assigns administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Provides opportunities to extend impact of high performing teachers and administrators. • Creates and implements clear criteria for recognition of schools and students. • Ensures administrators provide structured feedback and use the evaluation process for professional learning and growth. • Uses evaluation data to determine trends.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Engages with administrators to review multiple data sources. • Creates a coherent system to extend impact of administrators. • Supports school rituals, traditions, and initiatives. • Builds and sustains a focused on continuous improvement. Creates a district-wide plan for professional learning aligned to the Board's vision for professional learning and growth.

School Leadership	Score	Comments
Develop competent leadership at the district level and school level through intentional leadership pipelines.	**3**	**There are development programs in place, however concerns of the selection process of the leadership pipelines.**
Leverages administrators' strengths to engage all students in meaningful, relevant learning opportunities while ensuring employees are accountable for job responsibilities.	**4**	
Knowledgeable about the curriculum and establishes clear expectations for administrators.	**4**	
Supports professional learning activities for teachers and administrators.	**5**	
Uses administrator evaluation data to inform, assess, and adjust professional learning, goals, and plans.	**4**	
Demonstrates use of system and staff evaluation data for personnel policies, decision-making, promotion of career growth, and professional development.	**4**	
Offers professional development that is focused on student learning consistent with the school district's vision, mission, and goals.	**4**	

TOTAL SCORE: **____28_____**

Community Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school district level website, newsletters, and surveys if available. • Examples of meeting agendas and schedules for parental involvement and community engagement. • Samples of school partnerships and partnership activities. • Samples of meetings and conversations with community partners and educators. • Donations and contributions to each school or the district.	Shows limited or no evidence of: • Welcoming and engaging families. • Offering timely, relevant, and accessible communication. • Providing district staff with sufficient resources needed to communicate regularly with families. • Creating flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Assessing community partners and resources. • Allocating fiscal, human, technological, and physical resources or allocates these with misalignment to the Board's vision, mission, and goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Welcomes and engages all families. • Offers opportunities for families to participate in school initiatives when applicable. • Provides district staff with sufficient resources needed to communicate regularly with families. • Creates flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Conducts an accurate assessment of community partners and resources. • Ensures accepted resources support the Board's vision, mission, and goals. • Allocates fiscal, human, technological, and physical resources to align with the Board's vision, mission, and goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements: • Establishes a two-way communication process for families that provides information about student progress and learning. • Supports family and community partnerships that are visible and sustainable. • Assesses potential community partners and secures additional resources that support the district. Highlights usage of resources and shares district accomplishments by regularly communicating with community partners.

Community Relationships	Score	Comments
Identifies multiple points of view for problem solving situations and involves stakeholders in decisions affecting the district.	**3**	
Strategically utilizes community resources and established partnerships to support the Board's vision, mission, and goals.	**5**	

TOTAL SCORE: ___**8**_____

Business and Finance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of compliance with all financial audits including local, state, and federal. • Provide samples of both student and employee handbooks. • Provide samples of meeting with certified and noncertified staff on compliance with all Board policies and operating procedures. • Provide sample administrative procedures aligned with Board policy, state law, and federal requirements. • Board work session reports and agenda documents showing budgeting aligned with priorities.	• Rarely or never establishes, communicates, and enforces administrative procedures by: o Aligning them with Board policy, state law, and federal requirements. o Communicating established administrative procedures. o Ensuring administrators are accountable to the administrative procedures. • Rarely or never performs all budgetary responsibilities by: o Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Establishes, communicates, and enforces administrative procedures by: o Aligning them with Board policy, state law, and federal requirements. o Communicating established administrative procedures. o Ensuring administrators are accountable to the administrative procedures. • Performs timely, accurate, and transparent budgetary responsibilities by: o Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Leads administrators and staff in frequent reviews of administrative procedures to vet effectiveness and ensure the effective and efficient operation of the school district. • Leads administrators in frequent reviews of fiscal resource allocation to support the effective and efficient operation of the district.

Business and Finance	Score	Comments
Budget will be presented on time and in a transparent manner to both the board and community	**4**	
Steps will be articulated and implemented to ensure school leaders are resourced to address unique needs of every school.	**4**	
Demonstrates budget management including financial forecasting, planning, cashflow management, account auditing, and monitoring and oversees the district's fiduciary responsibilities.	**4**	
Provides accurate and timely reports to the Board on the financial condition of the school system.	**4**	
Meets and works collaboratively with the Board and appropriate staff to determine budget priorities, including alignment with strategy and the effective allocation of resources.	**3**	

TOTAL SCORE: **____19_____**

Board Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provides supporting documentation for each section of the director's evaluation instrument. • Samples of administrative procedures that adhere with Board policy.	• Inconsistently uses feedback from the Board to improve and demonstrates little evidence of growth. • Unprepared or disengaged with the Board and professional learning opportunities. • Engages in the evaluation process without evidence of focus on continuous improvement. • Self-reflections do not match the expectations of the Board of the director's evaluation instrument. • Inconsistently contributes to school district growth by failing to assist and mentor administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from the Board to implement personal and professional improvement strategies. • Prepared and engaged with the Board and professional learning opportunities. • Engages in the evaluation process with evidence of focus on improvement. • Contributes to the school district by assisting others, including at least two of the following. o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively participating in professional learning. • Building capacity for aspiring administrators.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Uses feedback from the Board to significantly improve performance. • Consistently prepared and highly engaged with the Board and in professional learning opportunities. • Engages in the evaluation process and seeks out feedback, matching the expectations of the Board and director's evaluation instrument. • Actively and consistently contributes to the school district by assisting and/or mentoring others, including: o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively leading professional learning. o Leading data-driven professional learning opportunities. o Building capacity for aspiring administrators.

Board Relationship	Score	Comments
Keeps board members informed on issues, needs, and operation of the school system.	**4**	
Follows through on initiatives and strategies communicated to the Board of Education	**5**	
Seeks and accepts constructive criticism of work from the Board	**3**	
Interprets and executes the intent of Board policy through the development of administrative procedures	**4**	
Maintains/improves relations with the Board by consistent and appropriate interpersonal/professional interactions while making appropriate recommendations based on thorough analysis and study.	**4**	

TOTAL SCORE: **__20_____**

Staff and Personnel Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of district level plan for recruiting both professional and noncertified staff. • Samples of school level data regarding induction, support, retention, and growth of staff. • Samples of school level plans to increase the rates of high-performing educators and increase retention rates.	• Rarely or never inducts, supports, retains, and grows administrators by designing and implementing an induction program for new administrators and staff. • Rarely or never develops strategies for: o Retaining high-performing educators and administrators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Designs and implements an induction program for new administrators and staff. • Develops strategies for: o Retaining high-performing educators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of all administrators and staff.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	Engages with the district leadership team to: • Design and implement an induction program for new educators. • Develop strategies for retaining high-performing educators. • Develop strategies for fostering leadership skills in the most effective educators and administrators based on student outcomes. • Supports the development of all administrators utilizing a variety of methods.

Staff and Personnel Relationships	Score	Comments
95% of Certified Positions will be staffed by the 10th day of each year.	**5**	**Based on the data**
90% of new teachers will be retained each year.	**3**	**Based on the data**
Employee retention rates will exceed 85% each school year.	**5**	**Based on the data**
Collaborates with administrators to induct, support, retain, and grow effective educators based on evidence of student outcomes.	**4**	**This process may be taking place, however there are concerns regarding retainment of teachers in some District 4 schools, therefore unsure about the effectiveness of the support.**
Develops appropriate structures to address staff morale based on district analysis.	**3**	**This is an area of concern based on observation and conversations with staff.**
Provides shared leadership and decision-making opportunities for staff that promotes a climate of collaboration and collegiality.	**3**	**Improvement is needed in this area. Based on my observation, Leadership**

		tends to lead from the prospective of Power & Control, not shared decision making.
Identifies and applies appropriate policies, criteria and processes for the recruitment, selection, induction, compensation, and separation of personnel.	**4**	
Evaluates the organizational structure of the district and reorganizes as necessary to achieve maximum effectiveness.	**3**	

TOTAL SCORE: **____30_____**

Integrity, Fairness, and Ethics Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provide samples of meetings and engagement with various stakeholders throughout the community. • Examples of meeting with teachers, staff, student groups, etc. outside of formal observations or staff meetings. • Examples of procedures that relate to communication plan for both certified and noncertified staff.	• Does not engage or limits engagement of stakeholder groups and does not seek input or feedback on district improvement. • Does not communicate expected values and beliefs to all staff. • Does not design or implement structures that increase shared ownership in district success. • Fails to establish high expectations for administrators' individual responsibility for district success.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Develops structures to encourage all stakeholders to provide input and feedback in district improvement decisions. • Communicates basic values and beliefs to all staff. • Models a commitment to the possibility of success for all students. • Designs and/or implements structures to increase shared ownership in district success. • Clearly and consistently communicates high expectations for administrators' individual responsibility for district success.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Develops capacity of administrators to implement structures for engaging all stakeholders to provide input and feedback in district improvement decisions. • Clearly communicates basic values and beliefs to all staff. • Enacts procedures that reflect a district-wide commitment to student success. • Clearly and consistently communicates administrators' individual responsibility for district success. Establishes a culture where all administrators address low expectations about student potential.

Integrity, Fairness, and Ethics	Score	Comments
Includes a varied set of administrators, educators, and stakeholders in district and school improvement decisions.	**3**	**What is the effectiveness of these councils? Are they just there for name's sake? Are we duplicating boards & councils?**
Models and communicates expectations for individual and shared ownership of student, educator, school, and district success.	**4**	
Expects and emphasizes that all staff demonstrate integrity and exercise ethical behavior throughout the district.	**3**	
Treats people fairly, equally, and with dignity and respect.	**3**	**This is an area of concern, based on observation and actions.**

TOTAL SCORE: **_____13_____**

Facilities and Safety Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school safety plans and/or school climate surveys. • Annual school level reporting of attendance rates and discipline referrals, including suspension and expulsion rates. • School district/county audits. • Examples of administrative procedures addressing finance and facilities.	• Expectations for resource allocation are not clearly aligned with the school district vision, mission, and goals. • District policies are not: o Clearly communicated. o Implemented consistently and fairly. o Related to students' safety. • Inadequate support for administrators to: o Analyze behavioral data to assess intervention and discipline effectiveness. • Use of data to adjust routines to maximize learning and decrease distractions.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Expectations for resource allocation are aligned with school district vision, mission, and goals. • District policies are: o Clearly communicated o Implemented consistently and fairly o Related to students' safety • Establishes practices that support: o Analyzing behavioral data to assess interventions and discipline effectiveness. o Use of data to adjust routines to maximize learning and decrease distractions. • Sufficient evidence that ensures administrators are adhering to expectations established in Board policy.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements ensures administrators: • Help set expectations for the learning environment and facilities that aligned with the school district vision, mission, and goals. • Review behavioral and discipline data to assess the effectiveness of interventions, adjusting when needed to ensure a safe learning environment.

Facilities/Safety	Score	Comments
Fosters a safe, respectful, and orderly learning environment for all.	**4**	
Demonstrates knowledge of school facilities and develops a process that builds public support for facility needs, including capital improvements.	**5**	
Ensures the maintenance of school property and the safety of personnel and property.	**3**	

TOTAL SCORE: **_____12_____**

District Management Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Director of Schools self-evaluation. • District's instructional and student supports plan along with professional development plans. • Summary as to what degree the district and schools met previous year's performance targets. • Artifacts of the district's performance aligned to state standards and accountability model. • Nature, extent, and frequency of concerns voiced by the Board regarding management level personnel	Rarely or never improves self-practice by: • Using feedback from sources to reflect on personal leadership practices and does not make any necessary changes for improvement. • Engaging in professional learning: ○ Aligned to student, educator, and self-need. ○ Focused on developing an understanding of performance expectations associated with state standards. • Implementing new, relevant learning from feedback and professional learning opportunities	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from a variety of sources to reflect on personal leadership practices and make any necessary changes for improvement. • Engages in professional learning aligned to student, educator, and self-need. • Develops an understanding of performance expectations associated with Tennessee Instructional Leader Standards. • Implements new, relevant learning from feedback and professional learning opportunities with evidence of improvement.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Actively seeks feedback from a variety of sources to reflect on personal leadership practices and makes any necessary changes for improvement. • Connects personal leadership practices to student achievement and administrator and educator performance by sharing his/her performance evaluation results with district staff. • Reflects on leadership alignment with core value and the Board's vision, mission, and goals.

District Management	Score	Comments
Ensures operational plans and procedures to achieve the vision, mission, and goals are in place.	**4**	
Identifies, confronts, and resolves problems in a timely manner.	**4**	
Recognizes, studies, and applies emerging trends as appropriate.	**4**	
Uses effective communication skills.	**4**	
Guides and directs upper-level district management in the performance of their job duties, accepts constructive criticism from the Board regarding same, and takes responsibility where appropriate.	**3**	

TOTAL SCORE: **___19_____**

Director of Schools Overall Evaluation Score

Total Mean Score Strategic Planning	**24**	**4.0**
Total Mean Score Student Achievement/Performance	**36**	**4.0**
Total Mean Score School Leadership	**28**	**4.0**
Total Mean Score Community Relationships	**8**	**4.0**
Total Mean Score Post-Secondary Opportunities		
Total Mean Score Business and Finance	**19**	**3.8**
Total Mean Score Board Relationship	**20**	**4.0**
Total Mean Score Staff and Personnel Relationships	**30**	**3.8**
Total Mean Score Integrity, Fairness, and Ethics	**13**	**3.3**
Total Mean Score Facilities/Safety	**12**	**4.0**
Total Mean Score District Management	**19**	**3.8**
Overall Mean Evaluation Score	**209**	**3.9**

__Jacqueline Thomas_____
Print Name

___Jacqueline Thomas_____12/1/2025_____
_____
Signature **Date**

Hamilton County Board of Education

Evaluation Model for the Director of Hamilton County Schools

Tennessee law requires the Hamilton County Board of Education to assign to the Director of Schools the day-to-day responsibility of operating the system within the approved budget and consistent with law and policy. Consequently, the selection and evaluation of the Director is one of the most important functions the Board of Education performs.

In order to fulfill its statutory obligations, and so the Director may have clear guidance regarding the Board's evaluation of his/her performance, the Board of Education, in consultation with the Director, has developed this Evaluation Model for the 2025-2026 school year. The foundation of this Evaluation Model is the Board's Strategic Plan, including corresponding annual goals; the laws of the State of Tennessee; and the Board's contract with the Director.

This Model will consist of three parts:

- **The Director's self-evaluation.**
  - **The Director will evaluate his/her own performance as well as the performance of the system using the criteria set forth below.**
  - **The Director will submit his/her self-evaluation to the Chair of the Board within 30 days of receipt of the State's annual assessment data of Hamilton County Schools.**
- **The Board's evaluation of the Director's performance.**
  - **The Board will evaluate the Director and the system using the criteria set forth below, the Director's self-evaluation, and the State's assessment data.**
  - **Each Board member will complete his or her evaluation within 30 days of receipt of the Director's self-evaluation and submit it to the Board secretary and the Board attorney.**
- **The Director's written response to the Board's evaluation.**

The Director and the Board will use the following Rating Scale:

1 = Significantly below expectations
2 = Below expectations
3 = At expectations
4 = Above expectations
5 = Significantly above expectations

Strategic Planning Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Agendas from district leadership and principal professional development. • District and school level goals for professional development related to student achievement, gap closure, college-career readiness, and growth. • District and School Improvement Plans that operationalize Opportunity 2030	Builds limited or no capacity for: • Developing administrators' understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to build administrator capacity.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Builds capacity among administrators for: • Developing an accurate understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources and instructional programs. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to improve instruction.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Communicates Opportunity 2030 to all staff. • Ensures the Board's vision, mission, and goals shape the educational programs, plans, and activities. • Actively monitors, evaluates, advises, and regularly updates the Board on Opportunity 2030

Strategic Planning	Score	Comments
Develop and implement Opportunity 2030 in collaboration with the school board to address key performance indicators on a yearly basis.	5	Dr.Robertson works hard to ensure that he communicates out to the board, staff, and community what Opportunity 2030 is and how the work that the district is doing ties to this plan. As he and his team report out to us month, as a board member I am able to see the alignment, evaluation, pivots etc, that are being made to the work to ensure alignment.
Initiates communication and facilitates cooperation and collaboration among staff regarding Opportunity 2030.	4	
Keeps the Board and community informed of progress towards goals set in Opportunity 2030.	4	
Ensures the vision shapes the educational programs, plans, and activities of the district.	4	
Uses assessment data related to student learning to effectuate the Board's strategic plan.	4	
Leads the Board in recasting or reframing the vision as necessary based upon available data.	4	

TOTAL SCORE: 25

Student Assessment/Performance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Sample of school and district improvement plans with strategies. • District and school level TVAAS scores. • Data summary of all district and school level accountability metrics. • Performance and monitoring data of district wide sub-groups. • District plan for monitoring school improvement plans and student academic performance. • Review of district report card.	Shows limited or no use of: • Multiple student, educator, school-wide, and district-wide data. • Specific data when analyzing and tracking student progress. • Academic and behavioral growth goals. • Expectations for adjusting instructional programs based on data. • Shared accountability for decisions targeting student achievement and growth goals. • No observable alignment between interventions and student achievement. • Planning that addresses academic growth goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Collaborates with administrators to: • Use multiple sources of student, educator, school and district-wide data. • Determine specific data to analyze when tracking student progress. • Establish specific strategies to meet or exceed academic and behavioral growth goals. • Communicate expectations for adjusting instruction programs in response to assessment data. • Establish shared accountability for instructional decisions targeting student achievement and growth goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Ensures administrators analyze and use multiple sources of student, educator, school and district-wide data. • Develops and monitors a district-wide data plan that includes: student progress tracking; strategies to meet or exceed growth and achievement goals; benchmark data; and data based changes to the instructional program. • Shared accountability for instructional decisions targeting achievement and growth goals. Establishes data-specific growth and achievement targets that result in gains

Student Achievement/Performance	Score	Comments
District Wide Value-Added will meet or exceed the State expectations each year.	3	meets state expectations, does not exceed
The percentage of students scoring below the 25th percentile will decrease by 2% each year.	3	
Collaborates with administrators to analyze and use multiple forms of data throughout the year to establish specific goals and strategies targeting student achievement and growth.	4	
Develops, monitors, and assesses district and school improvement plans, including the regular review and analysis of district test scores by school and sub-groups.	4	
Leads administrators to develop and execute interventions that address all student learning needs based on multiple sources of data.	4	
Applies and communicates qualitative and quantitative findings to identify strengths and weaknesses in programs and practices in order to ensure continuous improvement.	3	
Establishes systems for principals to regularly receive feedback on goal achievement and to assess ongoing school improvement efforts.	5	
Encourages various staffing patterns, student grouping plans, class scheduling plans, school organizational structures, and facilities design processes to support various teaching strategies and desired student outcomes.	4	
Increase Graduation Rate with a goal of reaching 90% within the next 4 years.	5	Grad rate was 94%

TOTAL SCORE: **_____35_____**

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School Leadership Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• District leadership team meeting agendas and notes. • School level summary of principal use of data in determining staffing needs and placement. • Summary of school level use of teacher effectiveness data and teacher leaders. • Samples of staff and student recognition events at each school. • Nature, extent, and frequency of complaints or concerns voiced about subordinates within chain of command.	• Limited or no assignment of administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Limited or no opportunities to extend impact of high-performing teachers. • Clear criteria for recognition and celebration of schools and student performance and growth. • Shows limited or no use of the evaluation process and does not meet with administrators. • Repeated complaints or concerns being raised within chain of command, to include the Board.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Assigns administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Provides opportunities to extend impact of high performing teachers and administrators. • Creates and implements clear criteria for recognition of schools and students. • Ensures administrators provide structured feedback and use the evaluation process for professional learning and growth. • Uses evaluation data to determine trends.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Engages with administrators to review multiple data sources. • Creates a coherent system to extend impact of administrators. • Supports school rituals, traditions, and initiatives. • Builds and sustains a focused on continuous improvement. Creates a district-wide plan for professional learning aligned to the Board's vision for professional learning and growth.

School Leadership	Score	Comments
Develop competent leadership at the district level and school level through intentional leadership pipelines.	4	
Leverages administrators' strengths to engage all students in meaningful, relevant learning opportunities while ensuring employees are accountable for job responsibilities.	4	
Knowledgeable about the curriculum and establishes clear expectations for administrators.	5	
Supports professional learning activities for teachers and administrators.	5	
Uses administrator evaluation data to inform, assess, and adjust professional learning, goals, and plans.	4	
Demonstrates use of system and staff evaluation data for personnel policies, decision-making, promotion of career growth, and professional development.	4	
Offers professional development that is focused on student learning consistent with the school district's vision, mission, and goals.	4	

TOTAL SCORE: 30

Community Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school district level website, newsletters, and surveys if available. • Examples of meeting agendas and schedules for parental involvement and community engagement. • Samples of school partnerships and partnership activities. • Samples of meetings and conversations with community partners and educators. • Donations and contributions to each school or the district.	Shows limited or no evidence of: • Welcoming and engaging families. • Offering timely, relevant, and accessible communication. • Providing district staff with sufficient resources needed to communicate regularly with families. • Creating flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Assessing community partners and resources. • Allocating fiscal, human, technological, and physical resources or allocates these with misalignment to the Board's vision, mission, and goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Welcomes and engages all families. • Offers opportunities for families to participate in school initiatives when applicable. • Provides district staff with sufficient resources needed to communicate regularly with families. • Creates flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Conducts an accurate assessment of community partners and resources. • Ensures accepted resources support the Board's vision, mission, and goals. • Allocates fiscal, human, technological, and physical resources to align with the Board's vision, mission, and goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements: • Establishes a two-way communication process for families that provides information about student progress and learning. • Supports family and community partnerships that are visible and sustainable. • Assesses potential community partners and secures additional resources that support the district. Highlights usage of resources and shares district accomplishments by regularly communicating with community partners.

Community Relationships	Score	Comments
Identifies multiple points of view for problem solving situations and involves stakeholders in decisions affecting the district.	5	
Strategically utilizes community resources and established partnerships to support the Board's vision, mission, and goals.	5	

TOTAL SCORE: 10 _____

Business and Finance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of compliance with all financial audits including local, state, and federal. • Provide samples of both student and employee handbooks. • Provide samples of meeting with certified and noncertified staff on compliance with all Board policies and operating procedures. • Provide sample administrative procedures aligned with Board policy, state law, and federal requirements. • Board work session reports and agenda documents showing budgeting aligned with priorities.	• Rarely or never establishes, communicates, and enforces administrative procedures by: o Aligning them with Board policy, state law, and federal requirements. o Communicating established administrative procedures. o Ensuring administrators are accountable to the administrative procedures. • Rarely or never performs all budgetary responsibilities by: o Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Establishes, communicates, and enforces administrative procedures by: o Aligning them with Board policy, state law, and federal requirements. o Communicating established administrative procedures. o Ensuring administrators are accountable to the administrative procedures. • Performs timely, accurate, and transparent budgetary responsibilities by: o Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Leads administrators and staff in frequent reviews of administrative procedures to vet effectiveness and ensure the effective and efficient operation of the school district. • Leads administrators in frequent reviews of fiscal resource allocation to support the effective and efficient operation of the district.

Business and Finance	Score	Comments
Budget will be presented on time and in a transparent manner to both the board and community	4	Budget was presented on time initially as well as each revision thereafter.
Steps will be articulated and implemented to ensure school leaders are resourced to address unique needs of every school.	4	
Demonstrates budget management including financial forecasting, planning, cashflow management, account auditing, and monitoring and oversees the district's fiduciary responsibilities.	4	
Provides accurate and timely reports to the Board on the financial condition of the school system.	4	
Meets and works collaboratively with the Board and appropriate staff to determine budget priorities, including alignment with strategy and the effective allocation of resources.	4	Dr. Robertson was present at each budget committee meeting aand ensured that appropriate district staff was present alongside him to answer any questions or provide supporting info. He was always willing to come back with revisions that included the edits or additions that were the pleasure of the board. He also clarified the ask of the board to be sure that he was meeting the ask.

TOTAL SCORE: 20

Board Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provides supporting documentation for each section of the director's evaluation instrument. • Samples of administrative procedures that adhere with Board policy.	• Inconsistently uses feedback from the Board to improve and demonstrates little evidence of growth. • Unprepared or disengaged with the Board and professional learning opportunities. • Engages in the evaluation process without evidence of focus on continuous improvement. • Self-reflections do not match the expectations of the Board of the director's evaluation instrument. • Inconsistently contributes to school district growth by failing to assist and mentor administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from the Board to implement personal and professional improvement strategies. • Prepared and engaged with the Board and professional learning opportunities. • Engages in the evaluation process with evidence of focus on improvement. • Contributes to the school district by assisting others, including at least two of the following. o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively participating in professional learning. • Building capacity for aspiring administrators.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Uses feedback from the Board to significantly improve performance. • Consistently prepared and highly engaged with the Board and in professional learning opportunities. • Engages in the evaluation process and seeks out feedback, matching the expectations of the Board and director's evaluation instrument. • Actively and consistently contributes to the school district by assisting and/or mentoring others, including: o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively leading professional learning. o Leading data-driven professional learning opportunities. o Building capacity for aspiring administrators.

Board Relationship	Score	Comments
Keeps board members informed on issues, needs, and operation of the school system.	4	
Follows through on initiatives and strategies communicated to the Board of Education	4	
Seeks and accepts constructive criticism of work from the Board	3	
Interprets and executes the intent of Board policy through the development of administrative procedures	3	
Maintains/improves relations with the Board by consistent and appropriate interpersonal/professional interactions while making appropriate recommendations based on thorough analysis and study.	4	

TOTAL SCORE: 18

Staff and Personnel Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of district level plan for recruiting both professional and noncertified staff. • Samples of school level data regarding induction, support, retention, and growth of staff. • Samples of school level plans to increase the rates of high-performing educators and increase retention rates.	• Rarely or never inducts, supports, retains, and grows administrators by designing and implementing an induction program for new administrators and staff. • Rarely or never develops strategies for: o Retaining high-performing educators and administrators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Designs and implements an induction program for new administrators and staff. • Develops strategies for: o Retaining high-performing educators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of all administrators and staff.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	Engages with the district leadership team to: • Design and implement an induction program for new educators. • Develop strategies for retaining high-performing educators. • Develop strategies for fostering leadership skills in the most effective educators and administrators based on student outcomes. • Supports the development of all administrators utilizing a variety of methods.

Staff and Personnel Relationships	Score	Comments
95% of Certified Positions will be staffed by the 10th day of each year.	5	99% staffed by 10th day
90% of new teachers will be retained each year.	3	Met expectation
Employee retention rates will exceed 85% each school year.	4	
Collaborates with administrators to induct, support, retain, and grow effective educators based on evidence of student outcomes.	4	
Develops appropriate structures to address staff morale based on district analysis.	4	
Provides shared leadership and decision-making opportunities for staff that promotes a climate of collaboration and collegiality.	3	
Identifies and applies appropriate policies, criteria and processes for the recruitment, selection, induction, compensation, and separation of personnel.	4	
Evaluates the organizational structure of the district and reorganizes as necessary to achieve maximum effectiveness.	4	

TOTAL SCORE: 31

Integrity, Fairness, and Ethics Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provide samples of meetings and engagement with various stakeholders throughout the community. • Examples of meeting with teachers, staff, student groups, etc. outside of formal observations or staff meetings. • Examples of procedures that relate to communication plan for both certified and noncertified staff.	• Does not engage or limits engagement of stakeholder groups and does not seek input or feedback on district improvement. • Does not communicate expected values and beliefs to all staff. • Does not design or implement structures that increase shared ownership in district success. • Fails to establish high expectations for administrators' individual responsibility for district success.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Develops structures to encourage all stakeholders to provide input and feedback in district improvement decisions. • Communicates basic values and beliefs to all staff. • Models a commitment to the possibility of success for all students. • Designs and/or implements structures to increase shared ownership in district success. • Clearly and consistently communicates high expectations for administrators' individual responsibility for district success.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Develops capacity of administrators to implement structures for engaging all stakeholders to provide input and feedback in district improvement decisions. • Clearly communicates basic values and beliefs to all staff. • Enacts procedures that reflect a district-wide commitment to student success. • Clearly and consistently communicates administrators' individual responsibility for district success. Establishes a culture where all administrators address low expectations about student potential.

Integrity, Fairness, and Ethics	Score	Comments
Includes a varied set of administrators, educators, and stakeholders in district and school improvement decisions.	4	
Models and communicates expectations for individual and shared ownership of student, educator, school, and district success.	4	
Expects and emphasizes that all staff demonstrate integrity and exercise ethical behavior throughout the district.	4	
Treats people fairly, equally, and with dignity and respect.	4	

TOTAL SCORE: 16

Facilities and Safety Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school safety plans and/or school climate surveys. • Annual school level reporting of attendance rates and discipline referrals, including suspension and expulsion rates. • School district/county audits. • Examples of administrative procedures addressing finance and facilities.	• Expectations for resource allocation are not clearly aligned with the school district vision, mission, and goals. • District policies are not: o Clearly communicated. o Implemented consistently and fairly. o Related to students' safety. • Inadequate support for administrators to: o Analyze behavioral data to assess intervention and discipline effectiveness. • Use of data to adjust routines to maximize learning and decrease distractions.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Expectations for resource allocation are aligned with school district vision, mission, and goals. • District policies are: o Clearly communicated o Implemented consistently and fairly o Related to students' safety • Establishes practices that support: o Analyzing behavioral data to assess interventions and discipline effectiveness. o Use of data to adjust routines to maximize learning and decrease distractions. • Sufficient evidence that ensures administrators are adhering to expectations established in Board policy.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements ensures administrators: • Help set expectations for the learning environment and facilities that aligned with the school district vision, mission, and goals. • Review behavioral and discipline data to assess the effectiveness of interventions, adjusting when needed to ensure a safe learning environment.

Facilities/Safety	Score	Comments
Fosters a safe, respectful, and orderly learning environment for all.	4	
Demonstrates knowledge of school facilities and develops a process that builds public support for facility needs, including capital improvements.	4	
Ensures the maintenance of school property and the safety of personnel and property.	3	

TOTAL SCORE: 11

District Management Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
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District Management	Score	Comments
Ensures operational plans and procedures to achieve the vision, mission, and goals are in place.	4	
Identifies, confronts, and resolves problems in a timely manner.	4	
Recognizes, studies, and applies emerging trends as appropriate.	4	
Uses effective communication skills.	4	
Guides and directs upper-level district management in the performance of their job duties, accepts constructive criticism from the Board regarding same, and takes responsibility where appropriate.	4	

TOTAL SCORE: 20

Director of Schools Overall Evaluation Score

Total Mean Score Strategic Planning	4.1
Total Mean Score Student Achievement/Performance	3.8
Total Mean Score School Leadership	4.2
Total Mean Score Community Relationships	5.0
Total Mean Score Post-Secondary Opportunities	
Total Mean Score Business and Finance	4.0
Total Mean Score Board Relationship	3.6
Total Mean Score Staff and Personnel Relationships	3.8
Total Mean Score Integrity, Fairness, and Ethics	4.0
Total Mean Score Facilities/Safety	3.6
Total Mean Score District Management	4.0
Overall Mean Evaluation Score	4.0

Karitsa M. Jones

Print Name

Signature

November 24, 2025

Date

Superintendent Review

Composed by Ben Connor,
Hamilton County Board of Education
Representing District 6

Cover Letter

NOTE: Please include this cover letter with the official evaluation and with any subsequent release or distribution of the evaluations to HCS staff or the public.

To All Concerned Parties,

Throughout my career, I have reviewed, and been reviewed by great leaders. While the professional context has varied over the years, one thing is consistent throughout: taking the time to give feedback in-person ensures better outcomes and stronger working relationships. This simple step most often leads to better collaboration, better communication, and to future success.

With this experience in mind, I am submitting my written review of Superintendent Robertson with the stipulation that I also plan to share feedback with him face-to-face and in conversation. A written evaluation simply cannot, by its very nature, successfully deliver positive criticism, critique, and guidance toward the achievement of shared goals.

Moreover, the limitations of the written word on the page can lead to confusion, misunderstanding, or may even be intentionally taken out of context for purposes apart from those intended. Let this cover letter serve as a recognition of the limitations of the instrument itself, and also as a statement of my intention to continually give in-person constructive evaluation as a matter of best practice.

Very Sincerely,

Ben Conner
Hamilton County School Board District 6

Hamilton County Board of Education

Evaluation Model for the Director of Hamilton County Schools

Tennessee law requires the Hamilton County Board of Education to assign to the Director of Schools the day-to-day responsibility of operating the system within the approved budget and consistent with law and policy. Consequently, the selection and evaluation of the Director is one of the most important functions the Board of Education performs.

In order to fulfill its statutory obligations, and so the Director may have clear guidance regarding the Board's evaluation of his/her performance, the Board of Education, in consultation with the Director, has developed this Evaluation Model for the 2025-2026 school year. The foundation of this Evaluation Model is the Board's Strategic Plan, including corresponding annual goals; the laws of the State of Tennessee; and the Board's contract with the Director.

This Model will consist of three parts:

- **The Director's self-evaluation.**
  - **The Director will evaluate his/her own performance as well as the performance of the system using the criteria set forth below.**
  - **The Director will submit his/her self-evaluation to the Chair of the Board within 30 days of receipt of the State's annual assessment data of Hamilton County Schools.**
- **The Board's evaluation of the Director's performance.**
  - **The Board will evaluate the Director and the system using the criteria set forth below, the Director's self-evaluation, and the State's assessment data.**
  - **Each Board member will complete his or her evaluation within 30 days of receipt of the Director's self-evaluation and submit it to the Board secretary and the Board attorney.**
- **The Director's written response to the Board's evaluation.**

The Director and the Board will use the following Rating Scale:

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2 = Below expectations
3 = At expectations
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5 = Significantly above expectations

Strategic Planning Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Agendas from district leadership and principal professional development. • District and school level goals for professional development related to student achievement, gap closure, college-career readiness, and growth. • District and School Improvement Plans that operationalize Opportunity 2030	Builds limited or no capacity for: • Developing administrators' understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to build administrator capacity.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Builds capacity among administrators for: • Developing an accurate understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources and instructional programs. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to improve instruction.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Communicates Opportunity 2030 to all staff. • Ensures the Board's vision, mission, and goals shape the educational programs, plans, and activities. • Actively monitors, evaluates, advises, and regularly updates the Board on Opportunity 2030

Strategic Planning	Score	Comments
Develop and implement Opportunity 2030 in collaboration with the school board to address key performance indicators on a yearly basis.	**4**	
Initiates communication and facilitates cooperation and collaboration among staff regarding Opportunity 2030.	**4**	
Keeps the Board and community informed of progress towards goals set in Opportunity 2030.	**4**	
Ensures the vision shapes the educational programs, plans, and activities of the district.	**4**	
Uses assessment data related to student learning to effectuate the Board's strategic plan.	**4**	
Leads the Board in recasting or reframing the vision as necessary based upon available data.	**4**	

TOTAL SCORE: _____**24**_____

Student Assessment/Performance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Sample of school and district improvement plans with strategies. • District and school level TVAAS scores. • Data summary of all district and school level accountability metrics. • Performance and monitoring data of district wide sub-groups. • District plan for monitoring school improvement plans and student academic performance. • Review of district report card.	Shows limited or no use of: • Multiple student, educator, school-wide, and district-wide data. • Specific data when analyzing and tracking student progress. • Academic and behavioral growth goals. • Expectations for adjusting instructional programs based on data. • Shared accountability for decisions targeting student achievement and growth goals. • No observable alignment between interventions and student achievement. • Planning that addresses academic growth goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Collaborates with administrators to: • Use multiple sources of student, educator, school and district-wide data. • Determine specific data to analyze when tracking student progress. • Establish specific strategies to meet or exceed academic and behavioral growth goals. • Communicate expectations for adjusting instruction programs in response to assessment data. • Establish shared accountability for instructional decisions targeting student achievement and growth goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Ensures administrators analyze and use multiple sources of student, educator, school and district-wide data. • Develops and monitors a district-wide data plan that includes: student progress tracking; strategies to meet or exceed growth and achievement goals; benchmark data; and data based changes to the instructional program. • Shared accountability for instructional decisions targeting achievement and growth goals. Establishes data-specific growth and achievement targets that result in gains

Student Achievement/Performance	Score	Comments
District Wide Value-Added will meet or exceed the State expectations each year.	**3.5**	
The percentage of students scoring below the 25th percentile will decrease by 2% each year.	**4**	
Collaborates with administrators to analyze and use multiple forms of data throughout the year to establish specific goals and strategies targeting student achievement and growth.	**4.5**	
Develops, monitors, and assesses district and school improvement plans, including the regular review and analysis of district test scores by school and sub-groups.	**4.5**	
Leads administrators to develop and execute interventions that address all student learning needs based on multiple sources of data.	**4.5**	
Applies and communicates qualitative and quantitative findings to identify strengths and weaknesses in programs and practices in order to ensure continuous improvement.	**3**	
Establishes systems for principals to regularly receive feedback on goal achievement and to assess ongoing school improvement efforts.	**4**	
Encourages various staffing patterns, student grouping plans, class scheduling plans, school organizational structures, and facilities design processes to support various teaching strategies and desired student outcomes.	**5**	
Increase Graduation Rate with a goal of reaching 90% within the next 4 years.	**5**	

TOTAL SCORE: **_____38_____**

School Leadership Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• District leadership team meeting agendas and notes. • School level summary of principal use of data in determining staffing needs and placement. • Summary of school level use of teacher effectiveness data and teacher leaders. • Samples of staff and student recognition events at each school. • Nature, extent, and frequency of complaints or concerns voiced about subordinates within chain of command.	• Limited or no assignment of administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Limited or no opportunities to extend impact of high-performing teachers. • Clear criteria for recognition and celebration of schools and student performance and growth. • Shows limited or no use of the evaluation process and does not meet with administrators. • Repeated complaints or concerns being raised within chain of command, to include the Board.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Assigns administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Provides opportunities to extend impact of high performing teachers and administrators. • Creates and implements clear criteria for recognition of schools and students. • Ensures administrators provide structured feedback and use the evaluation process for professional learning and growth. • Uses evaluation data to determine trends.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Engages with administrators to review multiple data sources. • Creates a coherent system to extend impact of administrators. • Supports school rituals, traditions, and initiatives. • Builds and sustains a focused on continuous improvement. Creates a district-wide plan for professional learning aligned to the Board's vision for professional learning and growth.

School Leadership	Score	Comments
Develop competent leadership at the district level and school level through intentional leadership pipelines.	**4**	
Leverages administrators' strengths to engage all students in meaningful, relevant learning opportunities while ensuring employees are accountable for job responsibilities.	**4.5**	
Knowledgeable about the curriculum and establishes clear expectations for administrators.	**4.5**	
Supports professional learning activities for teachers and administrators.	**4.5**	
Uses administrator evaluation data to inform, assess, and adjust professional learning, goals, and plans.	**4**	
Demonstrates use of system and staff evaluation data for personnel policies, decision-making, promotion of career growth, and professional development.	**4**	
Offers professional development that is focused on student learning consistent with the school district's vision, mission, and goals.	**4**	

TOTAL SCORE: _____**29.5**_____

Community Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school district level website, newsletters, and surveys if available. • Examples of meeting agendas and schedules for parental involvement and community engagement. • Samples of school partnerships and partnership activities. • Samples of meetings and conversations with community partners and educators. • Donations and contributions to each school or the district.	Shows limited or no evidence of: • Welcoming and engaging families. • Offering timely, relevant, and accessible communication. • Providing district staff with sufficient resources needed to communicate regularly with families. • Creating flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Assessing community partners and resources. • Allocating fiscal, human, technological, and physical resources or allocates these with misalignment to the Board's vision, mission, and goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Welcomes and engages all families. • Offers opportunities for families to participate in school initiatives when applicable. • Provides district staff with sufficient resources needed to communicate regularly with families. • Creates flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Conducts an accurate assessment of community partners and resources. • Ensures accepted resources support the Board's vision, mission, and goals. • Allocates fiscal, human, technological, and physical resources to align with the Board's vision, mission, and goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements: • Establishes a two-way communication process for families that provides information about student progress and learning. • Supports family and community partnerships that are visible and sustainable. • Assesses potential community partners and secures additional resources that support the district. Highlights usage of resources and shares district accomplishments by regularly communicating with community partners.

Community Relationships	Score	Comments
Identifies multiple points of view for problem solving situations and involves stakeholders in decisions affecting the district.	**3**	
Strategically utilizes community resources and established partnerships to support the Board's vision, mission, and goals.	**4**	

TOTAL SCORE: _____7_____

Business and Finance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of compliance with all financial audits including local, state, and federal. • Provide samples of both student and employee handbooks. • Provide samples of meeting with certified and noncertified staff on compliance with all Board policies and operating procedures. • Provide sample administrative procedures aligned with Board policy, state law, and federal requirements. • Board work session reports and agenda documents showing budgeting aligned with priorities.	• Rarely or never establishes, communicates, and enforces administrative procedures by: ○ Aligning them with Board policy, state law, and federal requirements. ○ Communicating established administrative procedures. ○ Ensuring administrators are accountable to the administrative procedures. • Rarely or never performs all budgetary responsibilities by: ○ Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Establishes, communicates, and enforces administrative procedures by: ○ Aligning them with Board policy, state law, and federal requirements. ○ Communicating established administrative procedures. ○ Ensuring administrators are accountable to the administrative procedures. • Performs timely, accurate, and transparent budgetary responsibilities by: ○ Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Leads administrators and staff in frequent reviews of administrative procedures to vet effectiveness and ensure the effective and efficient operation of the school district. • Leads administrators in frequent reviews of fiscal resource allocation to support the effective and efficient operation of the district.

Business and Finance	Score	Comments
Budget will be presented on time and in a transparent manner to both the board and community	**4.5**	
Steps will be articulated and implemented to ensure school leaders are resourced to address unique needs of every school.	**3**	
Demonstrates budget management including financial forecasting, planning, cashflow management, account auditing, and monitoring and oversees the district's fiduciary responsibilities.	**3**	
Provides accurate and timely reports to the Board on the financial condition of the school system.	**3**	
Meets and works collaboratively with the Board and appropriate staff to determine budget priorities, including alignment with strategy and the effective allocation of resources.	**3**	

TOTAL SCORE: **_____16.5_____**

Board Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provides supporting documentation for each section of the director's evaluation instrument. • Samples of administrative procedures that adhere with Board policy.	• Inconsistently uses feedback from the Board to improve and demonstrates little evidence of growth. • Unprepared or disengaged with the Board and professional learning opportunities. • Engages in the evaluation process without evidence of focus on continuous improvement. • Self-reflections do not match the expectations of the Board of the director's evaluation instrument. • Inconsistently contributes to school district growth by failing to assist and mentor administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from the Board to implement personal and professional improvement strategies. • Prepared and engaged with the Board and professional learning opportunities. • Engages in the evaluation process with evidence of focus on improvement. • Contributes to the school district by assisting others, including at least two of the following. o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively participating in professional learning. • Building capacity for aspiring administrators.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Uses feedback from the Board to significantly improve performance. • Consistently prepared and highly engaged with the Board and in professional learning opportunities. • Engages in the evaluation process and seeks out feedback, matching the expectations of the Board and director's evaluation instrument. • Actively and consistently contributes to the school district by assisting and/or mentoring others, including: o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively leading professional learning. o Leading data-driven professional learning opportunities. o Building capacity for aspiring administrators.

Board Relationship	Score	Comments
Keeps board members informed on issues, needs, and operation of the school system.	**3**	
Follows through on initiatives and strategies communicated to the Board of Education	**3**	
Seeks and accepts constructive criticism of work from the Board	**3**	
Interprets and executes the intent of Board policy through the development of administrative procedures	**3**	
Maintains/improves relations with the Board by consistent and appropriate interpersonal/professional interactions while making appropriate recommendations based on thorough analysis and study.	**3**	

TOTAL SCORE: _____**15**_____

Staff and Personnel Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of district level plan for recruiting both professional and noncertified staff. • Samples of school level data regarding induction, support, retention, and growth of staff. • Samples of school level plans to increase the rates of high-performing educators and increase retention rates.	• Rarely or never inducts, supports, retains, and grows administrators by designing and implementing an induction program for new administrators and staff. • Rarely or never develops strategies for: o Retaining high-performing educators and administrators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Designs and implements an induction program for new administrators and staff. • Develops strategies for: o Retaining high-performing educators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of all administrators and staff.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	Engages with the district leadership team to: • Design and implement an induction program for new educators. • Develop strategies for retaining high-performing educators. • Develop strategies for fostering leadership skills in the most effective educators and administrators based on student outcomes. • Supports the development of all administrators utilizing a variety of methods.

Staff and Personnel Relationships	Score	Comments
95% of Certified Positions will be staffed by the 10th day of each year.	**5**	
90% of new teachers will be retained each year.	**2**	
Employee retention rates will exceed 85% each school year.	**5**	
Collaborates with administrators to induct, support, retain, and grow effective educators based on evidence of student outcomes.	**3**	
Develops appropriate structures to address staff morale based on district analysis.	**3**	
Provides shared leadership and decision-making opportunities for staff that promotes a climate of collaboration and collegiality.	**4**	
Identifies and applies appropriate policies, criteria and processes for the recruitment, selection, induction, compensation, and separation of personnel.	**3**	
Evaluates the organizational structure of the district and reorganizes as necessary to achieve maximum effectiveness.	**3**	

TOTAL SCORE: **_____28_____**

Integrity, Fairness, and Ethics Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provide samples of meetings and engagement with various stakeholders throughout the community. • Examples of meeting with teachers, staff, student groups, etc. outside of formal observations or staff meetings. • Examples of procedures that relate to communication plan for both certified and noncertified staff.	• Does not engage or limits engagement of stakeholder groups and does not seek input or feedback on district improvement. • Does not communicate expected values and beliefs to all staff. • Does not design or implement structures that increase shared ownership in district success. • Fails to establish high expectations for administrators' individual responsibility for district success.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Develops structures to encourage all stakeholders to provide input and feedback in district improvement decisions. • Communicates basic values and beliefs to all staff. • Models a commitment to the possibility of success for all students. • Designs and/or implements structures to increase shared ownership in district success. • Clearly and consistently communicates high expectations for administrators' individual responsibility for district success.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Develops capacity of administrators to implement structures for engaging all stakeholders to provide input and feedback in district improvement decisions. • Clearly communicates basic values and beliefs to all staff. • Enacts procedures that reflect a district-wide commitment to student success. • Clearly and consistently communicates administrators' individual responsibility for district success. Establishes a culture where all administrators address low expectations about student potential.

Integrity, Fairness, and Ethics	Score	Comments
Includes a varied set of administrators, educators, and stakeholders in district and school improvement decisions.	**4**	
Models and communicates expectations for individual and shared ownership of student, educator, school, and district success.	**3.5**	
Expects and emphasizes that all staff demonstrate integrity and exercise ethical behavior throughout the district.	**4**	
Treats people fairly, equally, and with dignity and respect.	**4.5**	

TOTAL SCORE: **_____16_____**

Facilities and Safety Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school safety plans and/or school climate surveys. • Annual school level reporting of attendance rates and discipline referrals, including suspension and expulsion rates. • School district/county audits. • Examples of administrative procedures addressing finance and facilities.	• Expectations for resource allocation are not clearly aligned with the school district vision, mission, and goals. • District policies are not: o Clearly communicated. o Implemented consistently and fairly. o Related to students' safety. • Inadequate support for administrators to: o Analyze behavioral data to assess intervention and discipline effectiveness. • Use of data to adjust routines to maximize learning and decrease distractions.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Expectations for resource allocation are aligned with school district vision, mission, and goals. • District policies are: o Clearly communicated o Implemented consistently and fairly o Related to students' safety • Establishes practices that support: o Analyzing behavioral data to assess interventions and discipline effectiveness. o Use of data to adjust routines to maximize learning and decrease distractions. • Sufficient evidence that ensures administrators are adhering to expectations established in Board policy.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements ensures administrators: • Help set expectations for the learning environment and facilities that aligned with the school district vision, mission, and goals. • Review behavioral and discipline data to assess the effectiveness of interventions, adjusting when needed to ensure a safe learning environment.

Facilities/Safety	Score	Comments
Fosters a safe, respectful, and orderly learning environment for all.	**4.5**	
Demonstrates knowledge of school facilities and develops a process that builds public support for facility needs, including capital improvements.	**4**	
Ensures the maintenance of school property and the safety of personnel and property.	**3**	

TOTAL SCORE: **_____11.5_____**

District Management Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Director of Schools self-evaluation. • District's instructional and student supports plan along with professional development plans. • Summary as to what degree the district and schools met previous year's performance targets. • Artifacts of the district's performance aligned to state standards and accountability model. • Nature, extent, and frequency of concerns voiced by the Board regarding management level personnel	Rarely or never improves self-practice by: • Using feedback from sources to reflect on personal leadership practices and does not make any necessary changes for improvement. • Engaging in professional learning: ○ Aligned to student, educator, and self-need. ○ Focused on developing an understanding of performance expectations associated with state standards. • Implementing new, relevant learning from feedback and professional learning opportunities	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from a variety of sources to reflect on personal leadership practices and make any necessary changes for improvement. • Engages in professional learning aligned to student, educator, and self-need. • Develops an understanding of performance expectations associated with Tennessee Instructional Leader Standards. • Implements new, relevant learning from feedback and professional learning opportunities with evidence of improvement.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Actively seeks feedback from a variety of sources to reflect on personal leadership practices and makes any necessary changes for improvement. • Connects personal leadership practices to student achievement and administrator and educator performance by sharing his/her performance evaluation results with district staff. • Reflects on leadership alignment with core value and the Board's vision, mission, and goals.

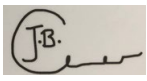
District Management	Score	Comments
Ensures operational plans and procedures to achieve the vision, mission, and goals are in place.	**4**	
Identifies, confronts, and resolves problems in a timely manner.	**3**	
Recognizes, studies, and applies emerging trends as appropriate.	**4**	
Uses effective communication skills.	**4**	
Guides and directs upper-level district management in the performance of their job duties, accepts constructive criticism from the Board regarding same, and takes responsibility where appropriate.	**4**	

TOTAL SCORE: **_____19_____**

Director of Schools Overall Evaluation Score

Total Mean Score Strategic Planning	**24**	**4.0**
Total Mean Score Student Achievement/Performance	**38**	**4.2**
Total Mean Score School Leadership	**29.5**	**4.2**
Total Mean Score Community Relationships	**7**	**3.5**
Total Mean Score Post-Secondary Opportunities	**not on the review**	
Total Mean Score Business and Finance	**16.5**	**3.3**
Total Mean Score Board Relationship	**15**	**3.0**
Total Mean Score Staff and Personnel Relationships	**28**	**3.5**
Total Mean Score Integrity, Fairness, and Ethics	**16**	**4.0**
Total Mean Score Facilities/Safety	**11.5**	**3.8**
Total Mean Score District Management	**19**	**3.8**
Overall Mean Evaluation Score	**204.5**	**3.8**

_____Ben Connor _____
Print Name



_____ **____12.1.2025_____**
Signature **Date**

Hamilton County Board of Education

Evaluation Model for the Director of Hamilton County Schools

Tennessee law requires the Hamilton County Board of Education to assign to the Director of Schools the day-to-day responsibility of operating the system within the approved budget and consistent with law and policy. Consequently, the selection and evaluation of the Director is one of the most important functions the Board of Education performs.

In order to fulfill its statutory obligations, and so the Director may have clear guidance regarding the Board's evaluation of his/her performance, the Board of Education, in consultation with the Director, has developed this Evaluation Model for the 2025-2026 school year. The foundation of this Evaluation Model is the Board's Strategic Plan, including corresponding annual goals; the laws of the State of Tennessee; and the Board's contract with the Director.

This Model will consist of three parts:

- **The Director's self-evaluation.**
  - **The Director will evaluate his/her own performance as well as the performance of the system using the criteria set forth below.**
  - **The Director will submit his/her self-evaluation to the Chair of the Board within 30 days of receipt of the State's annual assessment data of Hamilton County Schools.**
- **The Board's evaluation of the Director's performance.**
  - **The Board will evaluate the Director and the system using the criteria set forth below, the Director's self-evaluation, and the State's assessment data.**
  - **Each Board member will complete his or her evaluation within 30 days of receipt of the Director's self-evaluation and submit it to the Board secretary and the Board attorney.**
- **The Director's written response to the Board's evaluation.**

The Director and the Board will use the following Rating Scale:

1 = Significantly below expectations
2 = Below expectations
3 = At expectations
4 = Above expectations
5 = Significantly above expectations

Strategic Planning Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Agendas from district leadership and principal professional development. • District and school level goals for professional development related to student achievement, gap closure, college-career readiness, and growth. • District and School Improvement Plans that operationalize Opportunity 2030	Builds limited or no capacity for: • Developing administrators' understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to build administrator capacity.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Builds capacity among administrators for: • Developing an accurate understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources and instructional programs. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to improve instruction.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Communicates Opportunity 2030 to all staff. • Ensures the Board's vision, mission, and goals shape the educational programs, plans, and activities. • Actively monitors, evaluates, advises, and regularly updates the Board on Opportunity 2030

Strategic Planning	Score	Comments
Develop and implement Opportunity 2030 in collaboration with the school board to address key performance indicators on a yearly basis.	**4**	
Initiates communication and facilitates cooperation and collaboration among staff regarding Opportunity 2030.	**4**	
Keeps the Board and community informed of progress towards goals set in Opportunity 2030.	**3**	
Ensures the vision shapes the educational programs, plans, and activities of the district.	**3**	
Uses assessment data related to student learning to effectuate the Board's strategic plan.	**4**	
Leads the Board in recasting or reframing the vision as necessary based upon available data.	**3**	
TOTAL SCORE:	**3.5 – 21/30**	

Student Assessment/Performance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Sample of school and district improvement plans with strategies. • District and school level TVAAS scores. • Data summary of all district and school level accountability metrics. • Performance and monitoring data of district wide sub-groups. • District plan for monitoring school improvement plans and student academic performance. • Review of district report card.	Shows limited or no use of: • Multiple student, educator, school-wide, and district-wide data. • Specific data when analyzing and tracking student progress. • Academic and behavioral growth goals. • Expectations for adjusting instructional programs based on data. • Shared accountability for decisions targeting student achievement and growth goals. • No observable alignment between interventions and student achievement. • Planning that addresses academic growth goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Collaborates with administrators to: • Use multiple sources of student, educator, school and district-wide data. • Determine specific data to analyze when tracking student progress. • Establish specific strategies to meet or exceed academic and behavioral growth goals. • Communicate expectations for adjusting instruction programs in response to assessment data. • Establish shared accountability for instructional decisions targeting student achievement and growth goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Ensures administrators analyze and use multiple sources of student, educator, school and district-wide data. • Develops and monitors a district-wide data plan that includes: student progress tracking; strategies to meet or exceed growth and achievement goals; benchmark data; and data based changes to the instructional program. • Shared accountability for instructional decisions targeting achievement and growth goals. Establishes data-specific growth and achievement targets that result in gains

Student Achievement/Performance	Score	Comments
District Wide Value-Added will meet or exceed the State expectations each year.	3	
The percentage of students scoring below the 25th percentile will decrease by 2% each year.	3	**No data this year to show this metric was met.**
Collaborates with administrators to analyze and use multiple forms of data throughout the year to establish specific goals and strategies targeting student achievement and growth.	5	
Develops, monitors, and assesses district and school improvement plans, including the regular review and analysis of district test scores by school and sub-groups.	3	
Leads administrators to develop and execute interventions that address all student learning needs based on multiple sources of data.	3	
Applies and communicates qualitative and quantitative findings to identify strengths and weaknesses in programs and practices in order to ensure continuous improvement.	3	
Establishes systems for principals to regularly receive feedback on goal achievement and to assess ongoing school improvement efforts.	4	
Encourages various staffing patterns, student grouping plans, class scheduling plans, school organizational structures, and facilities design processes to support various teaching strategies and desired student outcomes.	3	
Increase Graduation Rate with a goal of reaching 90% within the next 4 years.	5	

TOTAL SCORE: **3.5 – 32/45**

School Leadership Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• District leadership team meeting agendas and notes. • School level summary of principal use of data in determining staffing needs and placement. • Summary of school level use of teacher effectiveness data and teacher leaders. • Samples of staff and student recognition events at each school. • Nature, extent, and frequency of complaints or concerns voiced about subordinates within chain of command.	• Limited or no assignment of administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Limited or no opportunities to extend impact of high-performing teachers. • Clear criteria for recognition and celebration of schools and student performance and growth. • Shows limited or no use of the evaluation process and does not meet with administrators. • Repeated complaints or concerns being raised within chain of command, to include the Board.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Assigns administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Provides opportunities to extend impact of high performing teachers and administrators. • Creates and implements clear criteria for recognition of schools and students. • Ensures administrators provide structured feedback and use the evaluation process for professional learning and growth. • Uses evaluation data to determine trends.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Engages with administrators to review multiple data sources. • Creates a coherent system to extend impact of administrators. • Supports school rituals, traditions, and initiatives. • Builds and sustains a focused on continuous improvement. Creates a district-wide plan for professional learning aligned to the Board's vision for professional learning and growth.

School Leadership	Score	Comments
Develop competent leadership at the district level and school level through intentional leadership pipelines.	4	
Leverages administrators' strengths to engage all students in meaningful, relevant learning opportunities while ensuring employees are accountable for job responsibilities.	4	
Knowledgeable about the curriculum and establishes clear expectations for administrators.	4	
Supports professional learning activities for teachers and administrators.	5	
Uses administrator evaluation data to inform, assess, and adjust professional learning, goals, and plans.	4	
Demonstrates use of system and staff evaluation data for personnel policies, decision-making, promotion of career growth, and professional development.	4	
Offers professional development that is focused on student learning consistent with the school district's vision, mission, and goals.	4	

TOTAL SCORE: **4.1 – 29/35**

Community Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school district level website, newsletters, and surveys if available. • Examples of meeting agendas and schedules for parental involvement and community engagement. • Samples of school partnerships and partnership activities. • Samples of meetings and conversations with community partners and educators. • Donations and contributions to each school or the district.	Shows limited or no evidence of: • Welcoming and engaging families. • Offering timely, relevant, and accessible communication. • Providing district staff with sufficient resources needed to communicate regularly with families. • Creating flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Assessing community partners and resources. • Allocating fiscal, human, technological, and physical resources or allocates these with misalignment to the Board's vision, mission, and goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Welcomes and engages all families. • Offers opportunities for families to participate in school initiatives when applicable. • Provides district staff with sufficient resources needed to communicate regularly with families. • Creates flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Conducts an accurate assessment of community partners and resources. • Ensures accepted resources support the Board's vision, mission, and goals. • Allocates fiscal, human, technological, and physical resources to align with the Board's vision, mission, and goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements: • Establishes a two-way communication process for families that provides information about student progress and learning. • Supports family and community partnerships that are visible and sustainable. • Assesses potential community partners and secures additional resources that support the district. Highlights usage of resources and shares district accomplishments by regularly communicating with community partners.

Community Relationships	Score	Comments
Identifies multiple points of view for problem solving situations and involves stakeholders in decisions affecting the district.	**3**	
Strategically utilizes community resources and established partnerships to support the Board's vision, mission, and goals.	**5**	

TOTAL SCORE: **4 – 8/10**

Business and Finance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of compliance with all financial audits including local, state, and federal. • Provide samples of both student and employee handbooks. • Provide samples of meeting with certified and noncertified staff on compliance with all Board policies and operating procedures. • Provide sample administrative procedures aligned with Board policy, state law, and federal requirements. • Board work session reports and agenda documents showing budgeting aligned with priorities.	• Rarely or never establishes, communicates, and enforces administrative procedures by: o Aligning them with Board policy, state law, and federal requirements. o Communicating established administrative procedures. o Ensuring administrators are accountable to the administrative procedures. • Rarely or never performs all budgetary responsibilities by: o Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Establishes, communicates, and enforces administrative procedures by: o Aligning them with Board policy, state law, and federal requirements. o Communicating established administrative procedures. o Ensuring administrators are accountable to the administrative procedures. • Performs timely, accurate, and transparent budgetary responsibilities by: o Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Leads administrators and staff in frequent reviews of administrative procedures to vet effectiveness and ensure the effective and efficient operation of the school district. • Leads administrators in frequent reviews of fiscal resource allocation to support the effective and efficient operation of the district.

Business and Finance	Score	Comments
Budget will be presented on time and in a transparent manner to both the board and community	**3**	
Steps will be articulated and implemented to ensure school leaders are resourced to address unique needs of every school.	**5**	
Demonstrates budget management including financial forecasting, planning, cashflow management, account auditing, and monitoring and oversees the district's fiduciary responsibilities.	**3**	
Provides accurate and timely reports to the Board on the financial condition of the school system.	**4**	
Meets and works collaboratively with the Board and appropriate staff to determine budget priorities, including alignment with strategy and the effective allocation of resources.	**3**	

TOTAL SCORE: **3.6 – 18/25**

Board Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provides supporting documentation for each section of the director's evaluation instrument. • Samples of administrative procedures that adhere with Board policy.	• Inconsistently uses feedback from the Board to improve and demonstrates little evidence of growth. • Unprepared or disengaged with the Board and professional learning opportunities. • Engages in the evaluation process without evidence of focus on continuous improvement. • Self-reflections do not match the expectations of the Board of the director's evaluation instrument. • Inconsistently contributes to school district growth by failing to assist and mentor administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from the Board to implement personal and professional improvement strategies. • Prepared and engaged with the Board and professional learning opportunities. • Engages in the evaluation process with evidence of focus on improvement. • Contributes to the school district by assisting others, including at least two of the following. o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively participating in professional learning. • Building capacity for aspiring administrators.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Uses feedback from the Board to significantly improve performance. • Consistently prepared and highly engaged with the Board and in professional learning opportunities. • Engages in the evaluation process and seeks out feedback, matching the expectations of the Board and director's evaluation instrument. • Actively and consistently contributes to the school district by assisting and/or mentoring others, including: o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively leading professional learning. o Leading data-driven professional learning opportunities. o Building capacity for aspiring administrators.

Board Relationship	Score	Comments
Keeps board members informed on issues, needs, and operation of the school system.	4	
Follows through on initiatives and strategies communicated to the Board of Education	4	
Seeks and accepts constructive criticism of work from the Board	3	
Interprets and executes the intent of Board policy through the development of administrative procedures	2	
Maintains/improves relations with the Board by consistent and appropriate interpersonal/professional interactions while making appropriate recommendations based on thorough analysis and study.	3	

TOTAL SCORE: **3.2 – 16/25**

Staff and Personnel Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of district level plan for recruiting both professional and noncertified staff. • Samples of school level data regarding induction, support, retention, and growth of staff. • Samples of school level plans to increase the rates of high-performing educators and increase retention rates.	• Rarely or never inducts, supports, retains, and grows administrators by designing and implementing an induction program for new administrators and staff. • Rarely or never develops strategies for: o Retaining high-performing educators and administrators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Designs and implements an induction program for new administrators and staff. • Develops strategies for: o Retaining high-performing educators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of all administrators and staff.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	Engages with the district leadership team to: • Design and implement an induction program for new educators. • Develop strategies for retaining high-performing educators. • Develop strategies for fostering leadership skills in the most effective educators and administrators based on student outcomes. • Supports the development of all administrators utilizing a variety of methods.

Staff and Personnel Relationships	Score	Comments
95% of Certified Positions will be staffed by the 10th day of each year.	5	
90% of new teachers will be retained each year.	3	
Employee retention rates will exceed 85% each school year.	5	
Collaborates with administrators to induct, support, retain, and grow effective educators based on evidence of student outcomes.	3	
Develops appropriate structures to address staff morale based on district analysis.	3	
Provides shared leadership and decision-making opportunities for staff that promotes a climate of collaboration and collegiality.	3	
Identifies and applies appropriate policies, criteria and processes for the recruitment, selection, induction, compensation, and separation of personnel.	4	
Evaluates the organizational structure of the district and reorganizes as necessary to achieve maximum effectiveness.	2	

TOTAL SCORE: **3.5 -28/40**

Integrity, Fairness, and Ethics Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provide samples of meetings and engagement with various stakeholders throughout the community. • Examples of meeting with teachers, staff, student groups, etc. outside of formal observations or staff meetings. • Examples of procedures that relate to communication plan for both certified and noncertified staff.	• Does not engage or limits engagement of stakeholder groups and does not seek input or feedback on district improvement. • Does not communicate expected values and beliefs to all staff. • Does not design or implement structures that increase shared ownership in district success. • Fails to establish high expectations for administrators' individual responsibility for district success.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Develops structures to encourage all stakeholders to provide input and feedback in district improvement decisions. • Communicates basic values and beliefs to all staff. • Models a commitment to the possibility of success for all students. • Designs and/or implements structures to increase shared ownership in district success. • Clearly and consistently communicates high expectations for administrators' individual responsibility for district success.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Develops capacity of administrators to implement structures for engaging all stakeholders to provide input and feedback in district improvement decisions. • Clearly communicates basic values and beliefs to all staff. • Enacts procedures that reflect a district-wide commitment to student success. • Clearly and consistently communicates administrators' individual responsibility for district success. Establishes a culture where all administrators address low expectations about student potential.

Integrity, Fairness, and Ethics	Score	Comments
Includes a varied set of administrators, educators, and stakeholders in district and school improvement decisions.	**3**	
Models and communicates expectations for individual and shared ownership of student, educator, school, and district success.	**4**	
Expects and emphasizes that all staff demonstrate integrity and exercise ethical behavior throughout the district.	**3**	
Treats people fairly, equally, and with dignity and respect.	**4**	

TOTAL SCORE: **3.5 – 14/20**

Facilities and Safety Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school safety plans and/or school climate surveys. • Annual school level reporting of attendance rates and discipline referrals, including suspension and expulsion rates. • School district/county audits. • Examples of administrative procedures addressing finance and facilities.	• Expectations for resource allocation are not clearly aligned with the school district vision, mission, and goals. • District policies are not: o Clearly communicated. o Implemented consistently and fairly. o Related to students' safety. • Inadequate support for administrators to: o Analyze behavioral data to assess intervention and discipline effectiveness. • Use of data to adjust routines to maximize learning and decrease distractions.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Expectations for resource allocation are aligned with school district vision, mission, and goals. • District policies are: o Clearly communicated o Implemented consistently and fairly o Related to students' safety • Establishes practices that support: o Analyzing behavioral data to assess interventions and discipline effectiveness. o Use of data to adjust routines to maximize learning and decrease distractions. • Sufficient evidence that ensures administrators are adhering to expectations established in Board policy.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements ensures administrators: • Help set expectations for the learning environment and facilities that aligned with the school district vision, mission, and goals. • Review behavioral and discipline data to assess the effectiveness of interventions, adjusting when needed to ensure a safe learning environment.

Facilities/Safety	Score	Comments
Fosters a safe, respectful, and orderly learning environment for all.	**4**	
Demonstrates knowledge of school facilities and develops a process that builds public support for facility needs, including capital improvements.	**4**	
Ensures the maintenance of school property and the safety of personnel and property.	**3**	

TOTAL SCORE: **3.6– 11/15**

District Management Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Director of Schools self-evaluation. • District's instructional and student supports plan along with professional development plans. • Summary as to what degree the district and schools met previous year's performance targets. • Artifacts of the district's performance aligned to state standards and accountability model. • Nature, extent, and frequency of concerns voiced by the Board regarding management level personnel	Rarely or never improves self-practice by: • Using feedback from sources to reflect on personal leadership practices and does not make any necessary changes for improvement. • Engaging in professional learning: o Aligned to student, educator, and self-need. o Focused on developing an understanding of performance expectations associated with state standards. • Implementing new, relevant learning from feedback and professional learning opportunities	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from a variety of sources to reflect on personal leadership practices and make any necessary changes for improvement. • Engages in professional learning aligned to student, educator, and self-need. • Develops an understanding of performance expectations associated with Tennessee Instructional Leader Standards. • Implements new, relevant learning from feedback and professional learning opportunities with evidence of improvement.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Actively seeks feedback from a variety of sources to reflect on personal leadership practices and makes any necessary changes for improvement. • Connects personal leadership practices to student achievement and administrator and educator performance by sharing his/her performance evaluation results with district staff. • Reflects on leadership alignment with core value and the Board's vision, mission, and goals.

District Management	Score	Comments
Ensures operational plans and procedures to achieve the vision, mission, and goals are in place.	4	
Identifies, confronts, and resolves problems in a timely manner.	4	
Recognizes, studies, and applies emerging trends as appropriate.	4	
Uses effective communication skills.	3	
Guides and directs upper-level district management in the performance of their job duties, accepts constructive criticism from the Board regarding same, and takes responsibility where appropriate.	3	

TOTAL SCORE: **3.6 – 18/25**

Director of Schools Overall Evaluation Score

Total Mean Score Strategic Planning	**3.5**
Total Mean Score Student Achievement/Performance	**3.5**
Total Mean Score School Leadership	**4.1**
Total Mean Score Community Relationships	**4**
Total Mean Score Post-Secondary Opportunities	
Total Mean Score Business and Finance	**3.6**
Total Mean Score Board Relationship	**3.2**
Total Mean Score Staff and Personnel Relationships	**3.5**
Total Mean Score Integrity, Fairness, and Ethics	**3.5**
Total Mean Score Facilities/Safety	**3.6**
Total Mean Score District Management	**3.6**
Overall Mean Evaluation Score	**3.6**

Jodi Schaffer
Print Name

Jodi Schaffer
Signature

12/1/2025
Date

Hamilton County Board of Education

Evaluation Model for the Director of Hamilton County Schools

Tennessee law requires the Hamilton County Board of Education to assign to the Director of Schools the day-to-day responsibility of operating the system within the approved budget and consistent with law and policy. Consequently, the selection and evaluation of the Director is one of the most important functions the Board of Education performs.

In order to fulfill its statutory obligations, and so the Director may have clear guidance regarding the Board's evaluation of his/her performance, the Board of Education, in consultation with the Director, has developed this Evaluation Model for the 2025-2026 school year. The foundation of this Evaluation Model is the Board's Strategic Plan, including corresponding annual goals; the laws of the State of Tennessee; and the Board's contract with the Director.

This Model will consist of three parts:

- **The Director's self-evaluation.**
  - **The Director will evaluate his/her own performance as well as the performance of the system using the criteria set forth below.**
  - **The Director will submit his/her self-evaluation to the Chair of the Board within 30 days of receipt of the State's annual assessment data of Hamilton County Schools.**
- **The Board's evaluation of the Director's performance.**
  - **The Board will evaluate the Director and the system using the criteria set forth below, the Director's self-evaluation, and the State's assessment data.**
  - **Each Board member will complete his or her evaluation within 30 days of receipt of the Director's self-evaluation and submit it to the Board secretary and the Board attorney.**
- **The Director's written response to the Board's evaluation.**

The Director and the Board will use the following Rating Scale:

1 = Significantly below expectations
2 = Below expectations
3 = At expectations
4 = Above expectations
5 = Significantly above expectations

Strategic Planning Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Agendas from district leadership and principal professional development. • District and school level goals for professional development related to student achievement, gap closure, college-career readiness, and growth. • District and School Improvement Plans that operationalize Opportunity 2030	Builds limited or no capacity for: • Developing administrators' understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to build administrator capacity.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Builds capacity among administrators for: • Developing an accurate understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources and instructional programs. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to improve instruction.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Communicates Opportunity 2030 to all staff. • Ensures the Board's vision, mission, and goals shape the educational programs, plans, and activities. • Actively monitors, evaluates, advises, and regularly updates the Board on Opportunity 2030

Strategic Planning	Score	Comments
Develop and implement Opportunity 2030 in collaboration with the school board to address key performance indicators on a yearly basis.	5	
Initiates communication and facilitates cooperation and collaboration among staff regarding Opportunity 2030.	5	
Keeps the Board and community informed of progress towards goals set in Opportunity 2030.	5	
Ensures the vision shapes the educational programs, plans, and activities of the district.	5	
Uses assessment data related to student learning to effectuate the Board's strategic plan.	4	
Leads the Board in recasting or reframing the vision as necessary based upon available data.	4	

TOTAL SCORE: 28

Student Assessment/Performance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Sample of school and district improvement plans with strategies. • District and school level TVAAS scores. • Data summary of all district and school level accountability metrics. • Performance and monitoring data of district wide sub-groups. • District plan for monitoring school improvement plans and student academic performance. • Review of district report card.	Shows limited or no use of: • Multiple student, educator, school-wide, and district-wide data. • Specific data when analyzing and tracking student progress. • Academic and behavioral growth goals. • Expectations for adjusting instructional programs based on data. • Shared accountability for decisions targeting student achievement and growth goals. • No observable alignment between interventions and student achievement. • Planning that addresses academic growth goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Collaborates with administrators to: • Use multiple sources of student, educator, school and district-wide data. • Determine specific data to analyze when tracking student progress. • Establish specific strategies to meet or exceed academic and behavioral growth goals. • Communicate expectations for adjusting instruction programs in response to assessment data. • Establish shared accountability for instructional decisions targeting student achievement and growth goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Ensures administrators analyze and use multiple sources of student, educator, school and district-wide data. • Develops and monitors a district-wide data plan that includes: student progress tracking; strategies to meet or exceed growth and achievement goals; benchmark data; and data based changes to the instructional program. • Shared accountability for instructional decisions targeting achievement and growth goals. Establishes data-specific growth and achievement targets that result in gains

Student Achievement/Performance	Score	Comments
District Wide Value-Added will meet or exceed the State expectations each year.	4	
The percentage of students scoring below the 25th percentile will decrease by 2% each year.	3	
Collaborates with administrators to analyze and use multiple forms of data throughout the year to establish specific goals and strategies targeting student achievement and growth.	5	
Develops, monitors, and assesses district and school improvement plans, including the regular review and analysis of district test scores by school and sub-groups.	4	
Leads administrators to develop and execute interventions that address all student learning needs based on multiple sources of data.	5	
Applies and communicates qualitative and quantitative findings to identify strengths and weaknesses in programs and practices in order to ensure continuous improvement.	4	
Establishes systems for principals to regularly receive feedback on goal achievement and to assess ongoing school improvement efforts.	5	
Encourages various staffing patterns, student grouping plans, class scheduling plans, school organizational structures, and facilities design processes to support various teaching strategies and desired student outcomes.	4	
Increase Graduation Rate with a goal of reaching 90% within the next 4 years.	5	

TOTAL SCORE: 39

School Leadership Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• District leadership team meeting agendas and notes. • School level summary of principal use of data in determining staffing needs and placement. • Summary of school level use of teacher effectiveness data and teacher leaders. • Samples of staff and student recognition events at each school. • Nature, extent, and frequency of complaints or concerns voiced about subordinates within chain of command.	• Limited or no assignment of administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Limited or no opportunities to extend impact of high-performing teachers. • Clear criteria for recognition and celebration of schools and student performance and growth. • Shows limited or no use of the evaluation process and does not meet with administrators. • Repeated complaints or concerns being raised within chain of command, to include the Board.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Assigns administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Provides opportunities to extend impact of high performing teachers and administrators. • Creates and implements clear criteria for recognition of schools and students. • Ensures administrators provide structured feedback and use the evaluation process for professional learning and growth. • Uses evaluation data to determine trends.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Engages with administrators to review multiple data sources. • Creates a coherent system to extend impact of administrators. • Supports school rituals, traditions, and initiatives. • Builds and sustains a focused on continuous improvement. Creates a district-wide plan for professional learning aligned to the Board's vision for professional learning and growth.

School Leadership	Score	Comments
Develop competent leadership at the district level and school level through intentional leadership pipelines.	5	
Leverages administrators' strengths to engage all students in meaningful, relevant learning opportunities while ensuring employees are accountable for job responsibilities.	4	
Knowledgeable about the curriculum and establishes clear expectations for administrators.	5	
Supports professional learning activities for teachers and administrators.	5	
Uses administrator evaluation data to inform, assess, and adjust professional learning, goals, and plans.	4	
Demonstrates use of system and staff evaluation data for personnel policies, decision-making, promotion of career growth, and professional development.	5	
Offers professional development that is focused on student learning consistent with the school district's vision, mission, and goals.	4	

TOTAL SCORE: _____32____

Community Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school district level website, newsletters, and surveys if available. • Examples of meeting agendas and schedules for parental involvement and community engagement. • Samples of school partnerships and partnership activities. • Samples of meetings and conversations with community partners and educators. • Donations and contributions to each school or the district.	Shows limited or no evidence of: • Welcoming and engaging families. • Offering timely, relevant, and accessible communication. • Providing district staff with sufficient resources needed to communicate regularly with families. • Creating flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Assessing community partners and resources. • Allocating fiscal, human, technological, and physical resources or allocates these with misalignment to the Board's vision, mission, and goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Welcomes and engages all families. • Offers opportunities for families to participate in school initiatives when applicable. • Provides district staff with sufficient resources needed to communicate regularly with families. • Creates flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Conducts an accurate assessment of community partners and resources. • Ensures accepted resources support the Board's vision, mission, and goals. • Allocates fiscal, human, technological, and physical resources to align with the Board's vision, mission, and goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements: • Establishes a two-way communication process for families that provides information about student progress and learning. • Supports family and community partnerships that are visible and sustainable. • Assesses potential community partners and secures additional resources that support the district. Highlights usage of resources and shares district accomplishments by regularly communicating with community partners.

Community Relationships	Score	Comments
Identifies multiple points of view for problem solving situations and involves stakeholders in decisions affecting the district.	4	
Strategically utilizes community resources and established partnerships to support the Board's vision, mission, and goals.	5	

TOTAL SCORE: ____9____

Business and Finance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of compliance with all financial audits including local, state, and federal. • Provide samples of both student and employee handbooks. • Provide samples of meeting with certified and noncertified staff on compliance with all Board policies and operating procedures. • Provide sample administrative procedures aligned with Board policy, state law, and federal requirements. • Board work session reports and agenda documents showing budgeting aligned with priorities.	• Rarely or never establishes, communicates, and enforces administrative procedures by: o Aligning them with Board policy, state law, and federal requirements. o Communicating established administrative procedures. o Ensuring administrators are accountable to the administrative procedures. • Rarely or never performs all budgetary responsibilities by: o Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Establishes, communicates, and enforces administrative procedures by: o Aligning them with Board policy, state law, and federal requirements. o Communicating established administrative procedures. o Ensuring administrators are accountable to the administrative procedures. • Performs timely, accurate, and transparent budgetary responsibilities by: o Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Leads administrators and staff in frequent reviews of administrative procedures to vet effectiveness and ensure the effective and efficient operation of the school district. • Leads administrators in frequent reviews of fiscal resource allocation to support the effective and efficient operation of the district.

Business and Finance	Score	Comments
Budget will be presented on time and in a transparent manner to both the board and community	4	
Steps will be articulated and implemented to ensure school leaders are resourced to address unique needs of every school.	4	
Demonstrates budget management including financial forecasting, planning, cashflow management, account auditing, and monitoring and oversees the district's fiduciary responsibilities.	5	
Provides accurate and timely reports to the Board on the financial condition of the school system.	5	
Meets and works collaboratively with the Board and appropriate staff to determine budget priorities, including alignment with strategy and the effective allocation of resources.	4	

TOTAL SCORE: ____22_____

Board Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provides supporting documentation for each section of the director's evaluation instrument. • Samples of administrative procedures that adhere with Board policy.	• Inconsistently uses feedback from the Board to improve and demonstrates little evidence of growth. • Unprepared or disengaged with the Board and professional learning opportunities. • Engages in the evaluation process without evidence of focus on continuous improvement. • Self-reflections do not match the expectations of the Board of the director's evaluation instrument. • Inconsistently contributes to school district growth by failing to assist and mentor administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from the Board to implement personal and professional improvement strategies. • Prepared and engaged with the Board and professional learning opportunities. • Engages in the evaluation process with evidence of focus on improvement. • Contributes to the school district by assisting others, including at least two of the following. o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively participating in professional learning. • Building capacity for aspiring administrators.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Uses feedback from the Board to significantly improve performance. • Consistently prepared and highly engaged with the Board and in professional learning opportunities. • Engages in the evaluation process and seeks out feedback, matching the expectations of the Board and director's evaluation instrument. • Actively and consistently contributes to the school district by assisting and/or mentoring others, including: o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively leading professional learning. o Leading data-driven professional learning opportunities. o Building capacity for aspiring administrators.

Board Relationship	Score	Comments
Keeps board members informed on issues, needs, and operation of the school system.	4	
Follows through on initiatives and strategies communicated to the Board of Education	4	
Seeks and accepts constructive criticism of work from the Board	4	
Interprets and executes the intent of Board policy through the development of administrative procedures	4	
Maintains/improves relations with the Board by consistent and appropriate interpersonal/professional interactions while making appropriate recommendations based on thorough analysis and study.	4	

TOTAL SCORE: 20

Staff and Personnel Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of district level plan for recruiting both professional and noncertified staff. • Samples of school level data regarding induction, support, retention, and growth of staff. • Samples of school level plans to increase the rates of high-performing educators and increase retention rates.	• Rarely or never inducts, supports, retains, and grows administrators by designing and implementing an induction program for new administrators and staff. • Rarely or never develops strategies for: o Retaining high-performing educators and administrators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Designs and implements an induction program for new administrators and staff. • Develops strategies for: o Retaining high-performing educators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of all administrators and staff.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	Engages with the district leadership team to: • Design and implement an induction program for new educators. • Develop strategies for retaining high-performing educators. • Develop strategies for fostering leadership skills in the most effective educators and administrators based on student outcomes. • Supports the development of all administrators utilizing a variety of methods.

Staff and Personnel Relationships	Score	Comments
95% of Certified Positions will be staffed by the 10th day of each year.	5	
90% of new teachers will be retained each year.	5	
Employee retention rates will exceed 85% each school year.	5	
Collaborates with administrators to induct, support, retain, and grow effective educators based on evidence of student outcomes.	4	
Develops appropriate structures to address staff morale based on district analysis.	4	
Provides shared leadership and decision-making opportunities for staff that promotes a climate of collaboration and collegiality.	3	
Identifies and applies appropriate policies, criteria and processes for the recruitment, selection, induction, compensation, and separation of personnel.	4	
Evaluates the organizational structure of the district and reorganizes as necessary to achieve maximum effectiveness.	4	

TOTAL SCORE: _____34__

Integrity, Fairness, and Ethics Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provide samples of meetings and engagement with various stakeholders throughout the community. • Examples of meeting with teachers, staff, student groups, etc. outside of formal observations or staff meetings. • Examples of procedures that relate to communication plan for both certified and noncertified staff.	• Does not engage or limits engagement of stakeholder groups and does not seek input or feedback on district improvement. • Does not communicate expected values and beliefs to all staff. • Does not design or implement structures that increase shared ownership in district success. • Fails to establish high expectations for administrators' individual responsibility for district success.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Develops structures to encourage all stakeholders to provide input and feedback in district improvement decisions. • Communicates basic values and beliefs to all staff. • Models a commitment to the possibility of success for all students. • Designs and/or implements structures to increase shared ownership in district success. • Clearly and consistently communicates high expectations for administrators' individual responsibility for district success.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Develops capacity of administrators to implement structures for engaging all stakeholders to provide input and feedback in district improvement decisions. • Clearly communicates basic values and beliefs to all staff. • Enacts procedures that reflect a district-wide commitment to student success. • Clearly and consistently communicates administrators' individual responsibility for district success. Establishes a culture where all administrators address low expectations about student potential.

Integrity, Fairness, and Ethics	Score	Comments
Includes a varied set of administrators, educators, and stakeholders in district and school improvement decisions.	4	
Models and communicates expectations for individual and shared ownership of student, educator, school, and district success.	5	
Expects and emphasizes that all staff demonstrate integrity and exercise ethical behavior throughout the district.	5	
Treats people fairly, equally, and with dignity and respect.	5	

TOTAL SCORE: 19

Facilities and Safety Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school safety plans and/or school climate surveys. • Annual school level reporting of attendance rates and discipline referrals, including suspension and expulsion rates. • School district/county audits. • Examples of administrative procedures addressing finance and facilities.	• Expectations for resource allocation are not clearly aligned with the school district vision, mission, and goals. • District policies are not: o Clearly communicated. o Implemented consistently and fairly. o Related to students' safety. • Inadequate support for administrators to: o Analyze behavioral data to assess intervention and discipline effectiveness. • Use of data to adjust routines to maximize learning and decrease distractions.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Expectations for resource allocation are aligned with school district vision, mission, and goals. • District policies are: o Clearly communicated o Implemented consistently and fairly o Related to students' safety • Establishes practices that support: o Analyzing behavioral data to assess interventions and discipline effectiveness. o Use of data to adjust routines to maximize learning and decrease distractions. • Sufficient evidence that ensures administrators are adhering to expectations established in Board policy.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements ensures administrators: • Help set expectations for the learning environment and facilities that aligned with the school district vision, mission, and goals. • Review behavioral and discipline data to assess the effectiveness of interventions, adjusting when needed to ensure a safe learning environment.

Facilities/Safety	Score	Comments
Fosters a safe, respectful, and orderly learning environment for all.	5	
Demonstrates knowledge of school facilities and develops a process that builds public support for facility needs, including capital improvements.	5	
Ensures the maintenance of school property and the safety of personnel and property.	5	

TOTAL SCORE: _____15_____

District Management Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Director of Schools self-evaluation. • District's instructional and student supports plan along with professional development plans. • Summary as to what degree the district and schools met previous year's performance targets. • Artifacts of the district's performance aligned to state standards and accountability model. • Nature, extent, and frequency of concerns voiced by the Board regarding management level personnel	Rarely or never improves self-practice by: • Using feedback from sources to reflect on personal leadership practices and does not make any necessary changes for improvement. • Engaging in professional learning: o Aligned to student, educator, and self-need. o Focused on developing an understanding of performance expectations associated with state standards. • Implementing new, relevant learning from feedback and professional learning opportunities	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from a variety of sources to reflect on personal leadership practices and make any necessary changes for improvement. • Engages in professional learning aligned to student, educator, and self-need. • Develops an understanding of performance expectations associated with Tennessee Instructional Leader Standards. • Implements new, relevant learning from feedback and professional learning opportunities with evidence of improvement.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Actively seeks feedback from a variety of sources to reflect on personal leadership practices and makes any necessary changes for improvement. • Connects personal leadership practices to student achievement and administrator and educator performance by sharing his/her performance evaluation results with district staff. • Reflects on leadership alignment with core value and the Board's vision, mission, and goals.

District Management	Score	Comments
Ensures operational plans and procedures to achieve the vision, mission, and goals are in place.	5	
Identifies, confronts, and resolves problems in a timely manner.	5	
Recognizes, studies, and applies emerging trends as appropriate.	5	
Uses effective communication skills.	5	
Guides and directs upper-level district management in the performance of their job duties, accepts constructive criticism from the Board regarding same, and takes responsibility where appropriate.	5	

TOTAL SCORE: 25

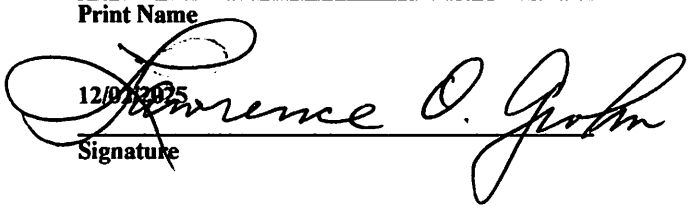
Director of Schools Overall Evaluation Score

Total Mean Score Strategic Planning	**28**
Total Mean Score Student Achievement/Performance	**40**
Total Mean Score School Leadership	**32**
Total Mean Score Community Relationships	**9**
Total Mean Score Post-Secondary Opportunities	**?**
Total Mean Score Business and Finance	**22**
Total Mean Score Board Relationship	**20**
Total Mean Score Staff and Personnel Relationships	**34**
Total Mean Score Integrity, Fairness, and Ethics	**19**
Total Mean Score Facilities/Safety	**15**
Total Mean Score District Management	**25**
Overall Mean Evaluation Score	

Lawrence O. Grohn

Print Name

12/1/2025



Signature

12/1/25

Date

Hamilton County Board of Education

Evaluation Model for the Director of Hamilton County Schools

Tennessee law requires the Hamilton County Board of Education to assign to the Director of Schools the day-to-day responsibility of operating the system within the approved budget and consistent with law and policy. Consequently, the selection and evaluation of the Director is one of the most important functions the Board of Education performs.

In order to fulfill its statutory obligations, and so the Director may have clear guidance regarding the Board's evaluation of his/her performance, the Board of Education, in consultation with the Director, has developed this Evaluation Model for the 2025-2026 school year. The foundation of this Evaluation Model is the Board's Strategic Plan, including corresponding annual goals; the laws of the State of Tennessee; and the Board's contract with the Director.

This Model will consist of three parts:

- **The Director's self-evaluation.**
  - **The Director will evaluate his/her own performance as well as the performance of the system using the criteria set forth below.**
  - **The Director will submit his/her self-evaluation to the Chair of the Board within 30 days of receipt of the State's annual assessment data of Hamilton County Schools.**
- **The Board's evaluation of the Director's performance.**
  - **The Board will evaluate the Director and the system using the criteria set forth below, the Director's self-evaluation, and the State's assessment data.**
  - **Each Board member will complete his or her evaluation within 30 days of receipt of the Director's self-evaluation and submit it to the Board secretary and the Board attorney.**
- **The Director's written response to the Board's evaluation.**

The Director and the Board will use the following Rating Scale:

1 = Significantly below expectations
2 = Below expectations
3 = At expectations
4 = Above expectations
5 = Significantly above expectations

Strategic Planning Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Agendas from district leadership and principal professional development. • District and school level goals for professional development related to student achievement, gap closure, college-career readiness, and growth. • District and School Improvement Plans that operationalize Opportunity 2030	Builds limited or no capacity for: • Developing administrators' understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to build administrator capacity.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Builds capacity among administrators for: • Developing an accurate understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources and instructional programs. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to improve instruction.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Communicates Opportunity 2030 to all staff. • Ensures the Board's vision, mission, and goals shape the educational programs, plans, and activities. • Actively monitors, evaluates, advises, and regularly updates the Board on Opportunity 2030

Strategic Planning	Score	Comments
Develop and implement Opportunity 2030 in collaboration with the school board to address key performance indicators on a yearly basis.	4	
Initiates communication and facilitates cooperation and collaboration among staff regarding Opportunity 2030.	4	
Keeps the Board and community informed of progress towards goals set in Opportunity 2030.	3	
Ensures the vision shapes the educational programs, plans, and activities of the district.	4	
Uses assessment data related to student learning to effectuate the Board's strategic plan.	4	
Leads the Board in recasting or reframing the vision as necessary based upon available data.	3	

TOTAL SCORE: _____22____

Student Assessment/Performance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Sample of school and district improvement plans with strategies. • District and school level TVAAS scores. • Data summary of all district and school level accountability metrics. • Performance and monitoring data of district wide sub-groups. • District plan for monitoring school improvement plans and student academic performance. • Review of district report card.	Shows limited or no use of: • Multiple student, educator, school-wide, and district-wide data. • Specific data when analyzing and tracking student progress. • Academic and behavioral growth goals. • Expectations for adjusting instructional programs based on data. • Shared accountability for decisions targeting student achievement and growth goals. • No observable alignment between interventions and student achievement. • Planning that addresses academic growth goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Collaborates with administrators to: • Use multiple sources of student, educator, school and district-wide data. • Determine specific data to analyze when tracking student progress. • Establish specific strategies to meet or exceed academic and behavioral growth goals. • Communicate expectations for adjusting instruction programs in response to assessment data. • Establish shared accountability for instructional decisions targeting student achievement and growth goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Ensures administrators analyze and use multiple sources of student, educator, school and district-wide data. • Develops and monitors a district-wide data plan that includes: student progress tracking; strategies to meet or exceed growth and achievement goals; benchmark data; and data based changes to the instructional program. • Shared accountability for instructional decisions targeting achievement and growth goals. Establishes data-specific growth and achievement targets that result in gains

Student Achievement/Performance	Score	Comments
District Wide Value-Added will meet or exceed the State expectations each year.	3	
The percentage of students scoring below the 25th percentile will decrease by 2% each year.	3	
Collaborates with administrators to analyze and use multiple forms of data throughout the year to establish specific goals and strategies targeting student achievement and growth.	4	
Develops, monitors, and assesses district and school improvement plans, including the regular review and analysis of district test scores by school and sub-groups.	4	
Leads administrators to develop and execute interventions that address all student learning needs based on multiple sources of data.	4	
Applies and communicates qualitative and quantitative findings to identify strengths and weaknesses in programs and practices in order to ensure continuous improvement.	3	
Establishes systems for principals to regularly receive feedback on goal achievement and to assess ongoing school improvement efforts.	4	
Encourages various staffing patterns, student grouping plans, class scheduling plans, school organizational structures, and facilities design processes to support various teaching strategies and desired student outcomes.	3	
Increase Graduation Rate with a goal of reaching 90% within the next 4 years.	4	

TOTAL SCORE: _____32_____

School Leadership Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• District leadership team meeting agendas and notes. • School level summary of principal use of data in determining staffing needs and placement. • Summary of school level use of teacher effectiveness data and teacher leaders. • Samples of staff and student recognition events at each school. • Nature, extent, and frequency of complaints or concerns voiced about subordinates within chain of command.	• Limited or no assignment of administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Limited or no opportunities to extend impact of high-performing teachers. • Clear criteria for recognition and celebration of schools and student performance and growth. • Shows limited or no use of the evaluation process and does not meet with administrators. • Repeated complaints or concerns being raised within chain of command, to include the Board.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Assigns administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Provides opportunities to extend impact of high performing teachers and administrators. • Creates and implements clear criteria for recognition of schools and students. • Ensures administrators provide structured feedback and use the evaluation process for professional learning and growth. • Uses evaluation data to determine trends.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Engages with administrators to review multiple data sources. • Creates a coherent system to extend impact of administrators. • Supports school rituals, traditions, and initiatives. • Builds and sustains a focused on continuous improvement. Creates a district-wide plan for professional learning aligned to the Board's vision for professional learning and growth.

School Leadership	Score	Comments
Develop competent leadership at the district level and school level through intentional leadership pipelines.	2	
Leverages administrators' strengths to engage all students in meaningful, relevant learning opportunities while ensuring employees are accountable for job responsibilities.	4	
Knowledgeable about the curriculum and establishes clear expectations for administrators.	3	
Supports professional learning activities for teachers and administrators.	4	
Uses administrator evaluation data to inform, assess, and adjust professional learning, goals, and plans.	3	
Demonstrates use of system and staff evaluation data for personnel policies, decision-making, promotion of career growth, and professional development.	3	

Offers professional development that is focused on student learning consistent with the school district's vision, mission, and goals.	5	

TOTAL SCORE: _____24_____

Community Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school district level website, newsletters, and surveys if available. • Examples of meeting agendas and schedules for parental involvement and community engagement. • Samples of school partnerships and partnership activities. • Samples of meetings and conversations with community partners and educators. • Donations and contributions to each school or the district.	Shows limited or no evidence of: • Welcoming and engaging families. • Offering timely, relevant, and accessible communication. • Providing district staff with sufficient resources needed to communicate regularly with families. • Creating flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Assessing community partners and resources. • Allocating fiscal, human, technological, and physical resources or allocates these with misalignment to the Board's vision, mission, and goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Welcomes and engages all families. • Offers opportunities for families to participate in school initiatives when applicable. • Provides district staff with sufficient resources needed to communicate regularly with families. • Creates flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Conducts an accurate assessment of community partners and resources. • Ensures accepted resources support the Board's vision, mission, and goals. • Allocates fiscal, human, technological, and physical resources to align with the Board's vision, mission, and goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements: • Establishes a two-way communication process for families that provides information about student progress and learning. • Supports family and community partnerships that are visible and sustainable. • Assesses potential community partners and secures additional resources that support the district. Highlights usage of resources and shares district accomplishments by regularly communicating with community partners.

Community Relationships	Score	Comments
Identifies multiple points of view for problem solving situations and involves stakeholders in decisions affecting the district.	4	
Strategically utilizes community resources and established partnerships to support the Board's vision, mission, and goals.	4	

TOTAL SCORE: _____8_____

Business and Finance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of compliance with all financial audits including local, state, and federal. • Provide samples of both student and employee handbooks. • Provide samples of meeting with certified and noncertified staff on compliance with all Board policies and operating procedures. • Provide sample administrative procedures aligned with Board policy, state law, and federal requirements. • Board work session reports and agenda documents showing budgeting aligned with priorities.	• Rarely or never establishes, communicates, and enforces administrative procedures by: o Aligning them with Board policy, state law, and federal requirements. o Communicating established administrative procedures. o Ensuring administrators are accountable to the administrative procedures. • Rarely or never performs all budgetary responsibilities by: o Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Establishes, communicates, and enforces administrative procedures by: o Aligning them with Board policy, state law, and federal requirements. o Communicating established administrative procedures. o Ensuring administrators are accountable to the administrative procedures. • Performs timely, accurate, and transparent budgetary responsibilities by: o Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Leads administrators and staff in frequent reviews of administrative procedures to vet effectiveness and ensure the effective and efficient operation of the school district. • Leads administrators in frequent reviews of fiscal resource allocation to support the effective and efficient operation of the district.

Business and Finance	Score	Comments
Budget will be presented on time and in a transparent manner to both the board and community	4	
Steps will be articulated and implemented to ensure school leaders are resourced to address unique needs of every school.	5	
Demonstrates budget management including financial forecasting, planning, cashflow management, account auditing, and monitoring and oversees the district's fiduciary responsibilities.	3	
Provides accurate and timely reports to the Board on the financial condition of the school system.	4	
Meets and works collaboratively with the Board and appropriate staff to determine budget priorities, including alignment with strategy and the effective allocation of resources.	4	

TOTAL SCORE: _____20_____

Board Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provides supporting documentation for each section of the director's evaluation instrument. • Samples of administrative procedures that adhere with Board policy.	• Inconsistently uses feedback from the Board to improve and demonstrates little evidence of growth. • Unprepared or disengaged with the Board and professional learning opportunities. • Engages in the evaluation process without evidence of focus on continuous improvement. • Self-reflections do not match the expectations of the Board of the director's evaluation instrument. • Inconsistently contributes to school district growth by failing to assist and mentor administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from the Board to implement personal and professional improvement strategies. • Prepared and engaged with the Board and professional learning opportunities. • Engages in the evaluation process with evidence of focus on improvement. • Contributes to the school district by assisting others, including at least two of the following. ○ Collaborative planning with administrators and staff to execute Board policies and decisions. ○ Actively participating in professional learning. • Building capacity for aspiring administrators.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Uses feedback from the Board to significantly improve performance. • Consistently prepared and highly engaged with the Board and in professional learning opportunities. • Engages in the evaluation process and seeks out feedback, matching the expectations of the Board and director's evaluation instrument. • Actively and consistently contributes to the school district by assisting and/or mentoring others, including: ○ Collaborative planning with administrators and staff to execute Board policies and decisions. ○ Actively leading professional learning. ○ Leading data-driven professional learning opportunities. ○ Building capacity for aspiring administrators.

Board Relationship	Score	Comments
Keeps board members informed on issues, needs, and operation of the school system.	4	
Follows through on initiatives and strategies communicated to the Board of Education	3	
Seeks and accepts constructive criticism of work from the Board	4	
Interprets and executes the intent of Board policy through the development of administrative procedures	3	

Maintains/improves relations with the Board by consistent and appropriate interpersonal/professional interactions while making appropriate recommendations based on thorough analysis and study.	4	

TOTAL SCORE: _____18_____

Staff and Personnel Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of district level plan for recruiting both professional and noncertified staff. • Samples of school level data regarding induction, support, retention, and growth of staff. • Samples of school level plans to increase the rates of high-performing educators and increase retention rates.	• Rarely or never inducts, supports, retains, and grows administrators by designing and implementing an induction program for new administrators and staff. • Rarely or never develops strategies for: ○ Retaining high-performing educators and administrators. ○ Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Designs and implements an induction program for new administrators and staff. • Develops strategies for: ○ Retaining high-performing educators. ○ Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of all administrators and staff.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	Engages with the district leadership team to: • Design and implement an induction program for new educators. • Develop strategies for retaining high-performing educators. • Develop strategies for fostering leadership skills in the most effective educators and administrators based on student outcomes. • Supports the development of all administrators utilizing a variety of methods.

Staff and Personnel Relationships	Score	Comments
95% of Certified Positions will be staffed by the 10th day of each year.	5	
90% of new teachers will be retained each year.	3	
Employee retention rates will exceed 85% each school year.	4	
Collaborates with administrators to induct, support, retain, and grow effective educators based on evidence of student outcomes.	4	
Develops appropriate structures to address staff morale based on district analysis.	2	
Provides shared leadership and decision-making opportunities for staff that promotes a climate of collaboration and collegiality.	3	

Identifies and applies appropriate policies, criteria and processes for the recruitment, selection, induction, compensation, and separation of personnel.	3	
Evaluates the organizational structure of the district and reorganizes as necessary to achieve maximum effectiveness.	4	

TOTAL SCORE: **____28_____**

Integrity, Fairness, and Ethics Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provide samples of meetings and engagement with various stakeholders throughout the community. • Examples of meeting with teachers, staff, student groups, etc. outside of formal observations or staff meetings. • Examples of procedures that relate to communication plan for both certified and noncertified staff.	• Does not engage or limits engagement of stakeholder groups and does not seek input or feedback on district improvement. • Does not communicate expected values and beliefs to all staff. • Does not design or implement structures that increase shared ownership in district success. • Fails to establish high expectations for administrators' individual responsibility for district success.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Develops structures to encourage all stakeholders to provide input and feedback in district improvement decisions. • Communicates basic values and beliefs to all staff. • Models a commitment to the possibility of success for all students. • Designs and/or implements structures to increase shared ownership in district success. • Clearly and consistently communicates high expectations for administrators' individual responsibility for district success.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Develops capacity of administrators to implement structures for engaging all stakeholders to provide input and feedback in district improvement decisions. • Clearly communicates basic values and beliefs to all staff. • Enacts procedures that reflect a district-wide commitment to student success. • Clearly and consistently communicates administrators' individual responsibility for district success. Establishes a culture where all administrators address low expectations about student potential.

Integrity, Fairness, and Ethics	Score	Comments
Includes a varied set of administrators, educators, and stakeholders in district and school improvement decisions.	4	
Models and communicates expectations for individual and shared ownership of student, educator, school, and district success.	5	
Expects and emphasizes that all staff demonstrate integrity and exercise ethical behavior throughout the district.	3	
Treats people fairly, equally, and with dignity and respect.	4	

TOTAL SCORE: _____16_____

Facilities and Safety Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school safety plans and/or school climate surveys. • Annual school level reporting of attendance rates and discipline referrals, including suspension and expulsion rates. • School district/county audits. • Examples of administrative procedures addressing finance and facilities.	• Expectations for resource allocation are not clearly aligned with the school district vision, mission, and goals. • District policies are not: o Clearly communicated. o Implemented consistently and fairly. o Related to students' safety. • Inadequate support for administrators to: o Analyze behavioral data to assess intervention and discipline effectiveness. • Use of data to adjust routines to maximize learning and decrease distractions.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Expectations for resource allocation are aligned with school district vision, mission, and goals. • District policies are: o Clearly communicated o Implemented consistently and fairly o Related to students' safety • Establishes practices that support: o Analyzing behavioral data to assess interventions and discipline effectiveness. o Use of data to adjust routines to maximize learning and decrease distractions. • Sufficient evidence that ensures administrators are adhering to expectations established in Board policy.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements ensures administrators: • Help set expectations for the learning environment and facilities that aligned with the school district vision, mission, and goals. • Review behavioral and discipline data to assess the effectiveness of interventions, adjusting when needed to ensure a safe learning environment.

Facilities/Safety	Score	Comments
Fosters a safe, respectful, and orderly learning environment for all.	3	
Demonstrates knowledge of school facilities and develops a process that builds public support for facility needs, including capital improvements.	4	
Ensures the maintenance of school property and the safety of personnel and property.	3	

TOTAL SCORE: _____10____

District Management Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Director of Schools self-evaluation. • District's instructional and student supports plan along with professional development plans. • Summary as to what degree the district and schools met previous year's performance targets. • Artifacts of the district's performance aligned to state standards and accountability model. • Nature, extent, and frequency of concerns voiced by the Board regarding management level personnel	Rarely or never improves self-practice by: • Using feedback from sources to reflect on personal leadership practices and does not make any necessary changes for improvement. • Engaging in professional learning: ○ Aligned to student, educator, and self-need. ○ Focused on developing an understanding of performance expectations associated with state standards. • Implementing new, relevant learning from feedback and professional learning opportunities	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from a variety of sources to reflect on personal leadership practices and make any necessary changes for improvement. • Engages in professional learning aligned to student, educator, and self-need. • Develops an understanding of performance expectations associated with Tennessee Instructional Leader Standards. • Implements new, relevant learning from feedback and professional learning opportunities with evidence of improvement.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Actively seeks feedback from a variety of sources to reflect on personal leadership practices and makes any necessary changes for improvement. • Connects personal leadership practices to student achievement and administrator and educator performance by sharing his/her performance evaluation results with district staff. • Reflects on leadership alignment with core value and the Board's vision, mission, and goals.

District Management	Score	Comments
Ensures operational plans and procedures to achieve the vision, mission, and goals are in place.	4	
Identifies, confronts, and resolves problems in a timely manner.	4	
Recognizes, studies, and applies emerging trends as appropriate.	3	
Uses effective communication skills.	5	
Guides and directs upper-level district management in the performance of their job duties, accepts constructive criticism from the Board regarding same, and takes responsibility where appropriate.	3	

TOTAL SCORE: _____19_____

Director of Schools Overall Evaluation Score

Total Mean Score Strategic Planning	**22/30**	**3.66**
Total Mean Score Student Achievement/Performance	**32/45**	**3.55**
Total Mean Score School Leadership	**24/35**	**3.42**
Total Mean Score Community Relationships	**8/10**	**4.0**
Total Mean Score Post-Secondary Opportunities	**?????**	
Total Mean Score Business and Finance	**20/25**	**4.0**
Total Mean Score Board Relationship	**18/25**	**3.60**
Total Mean Score Staff and Personnel Relationships	**28/40**	**3.50**
Total Mean Score Integrity, Fairness, and Ethics	**16/20**	**4.0**
Total Mean Score Facilities/Safety	**10/15**	**3.33**
Total Mean Score District Management	**19/25**	**3.80**
Overall Mean Evaluation Score	**3.7**	

Gary Kuehn
Print Name

Signature

11/6/2025
Date

Hamilton County Board of Education

Evaluation Model for the Director of Hamilton County Schools

Tennessee law requires the Hamilton County Board of Education to assign to the Director of Schools the day-to-day responsibility of operating the system within the approved budget and consistent with law and policy. Consequently, the selection and evaluation of the Director is one of the most important functions the Board of Education performs.

In order to fulfill its statutory obligations, and so the Director may have clear guidance regarding the Board's evaluation of his/her performance, the Board of Education, in consultation with the Director, has developed this Evaluation Model for the 2025-2026 school year. The foundation of this Evaluation Model is the Board's Strategic Plan, including corresponding annual goals; the laws of the State of Tennessee; and the Board's contract with the Director.

This Model will consist of three parts:

- **The Director's self-evaluation.**
  - **The Director will evaluate his/her own performance as well as the performance of the system using the criteria set forth below.**
  - **The Director will submit his/her self-evaluation to the Chair of the Board within 30 days of receipt of the State's annual assessment data of Hamilton County Schools.**
- **The Board's evaluation of the Director's performance.**
  - **The Board will evaluate the Director and the system using the criteria set forth below, the Director's self-evaluation, and the State's assessment data.**
  - **Each Board member will complete his or her evaluation within 30 days of receipt of the Director's self-evaluation and submit it to the Board secretary and the Board attorney.**
- **The Director's written response to the Board's evaluation.**

The Director and the Board will use the following Rating Scale:

1 = Significantly below expectations
2 = Below expectations
3 = At expectations
4 = Above expectations
5 = Significantly above expectations

Strategic Planning Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Agendas from district leadership and principal professional development. • District and school level goals for professional development related to student achievement, gap closure, college-career readiness, and growth. • District and School Improvement Plans that operationalize Opportunity 2030	Builds limited or no capacity for: • Developing administrators' understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to build administrator capacity.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Builds capacity among administrators for: • Developing an accurate understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources and instructional programs. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to improve instruction.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Communicates Opportunity 2030 to all staff. • Ensures the Board's vision, mission, and goals shape the educational programs, plans, and activities. • Actively monitors, evaluates, advises, and regularly updates the Board on Opportunity 2030

Strategic Planning	Score	Comments
Develop and implement Opportunity 2030 in collaboration with the school board to address key performance indicators on a yearly basis.	3	The current board had no say in developing Opportunity 2030. I do not see this as a collaboration but as the board is being informed.
Initiates communication and facilitates cooperation and collaboration among staff regarding Opportunity 2030.	4	There seems to be a lack of cooperation at times among senior staff.
Keeps the Board and community informed of progress towards goals set in Opportunity 2030.	4	The board receives regular reports at the board meeting on the progress towards goals.
Ensures the vision shapes the educational programs, plans, and activities of the district.	4	Sometimes the administration seems to get off track by ventures outside of the scope of the vision. One example is the potential to house teachers.
Uses assessment data related to student learning to effectuate the Board's strategic plan.	3	Many teachers complained about excessive testing and other personnel complained about the collection of data for SSP.
Leads the Board in recasting or reframing the vision as necessary based upon available data.	3	The superintendent has been resistant at times to changes recommended by the board.

TOTAL SCORE: **____3.5_____**

Student Assessment/Performance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Sample of school and district improvement plans with strategies. • District and school level TVAAS scores. • Data summary of all district and school level accountability metrics. • Performance and monitoring data of district wide sub-groups. • District plan for monitoring school improvement plans and student academic performance. • Review of district report card.	Shows limited or no use of: • Multiple student, educator, school-wide, and district-wide data. • Specific data when analyzing and tracking student progress. • Academic and behavioral growth goals. • Expectations for adjusting instructional programs based on data. • Shared accountability for decisions targeting student achievement and growth goals. • No observable alignment between interventions and student achievement. • Planning that addresses academic growth goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Collaborates with administrators to: • Use multiple sources of student, educator, school and district-wide data. • Determine specific data to analyze when tracking student progress. • Establish specific strategies to meet or exceed academic and behavioral growth goals. • Communicate expectations for adjusting instruction programs in response to assessment data. • Establish shared accountability for instructional decisions targeting student achievement and growth goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Ensures administrators analyze and use multiple sources of student, educator, school and district-wide data. • Develops and monitors a district-wide data plan that includes: student progress tracking; strategies to meet or exceed growth and achievement goals; benchmark data; and data based changes to the instructional program. • Shared accountability for instructional decisions targeting achievement and growth goals. Establishes data-specific growth and achievement targets that result in gains

Student Achievement/Performance	Score	Comments
District Wide Value-Added will meet or exceed the State expectations each year.	**3**	The district achieved a TVAAS score of 3 district-wide.
The percentage of students scoring below the 25th percentile will decrease by 2% each year.	**2**	The percentage of students scoring below the 25th percentile increased.
Collaborates with administrators to analyze and use multiple forms of data throughout the year to establish specific goals and strategies targeting student achievement and growth.	**4**	Administrators use data to target needed. Areas.
Develops, monitors, and assesses district and school improvement plans, including the regular review and analysis of district test scores by school and sub-groups.	**5**	I would like to receive more information on this in the future.
Leads administrators to develop and execute interventions that address all student learning needs based on multiple sources of data.	**3**	We should encourage principals to use strategic funds for RTI or move to the base model in place of other positions.
Applies and communicates qualitative and quantitative findings to identify strengths and weaknesses in programs and practices in order to ensure continuous improvement.	**2**	I am concerned about some of the middle school math scores.
Establishes systems for principals to regularly receive feedback on goal achievement and to assess ongoing school improvement efforts.	**5**	I would like more information on the community superintendent's role in assessing achievement and school improvement.
Encourages various staffing patterns, student grouping plans, class scheduling plans, school organizational structures, and facilities design processes to support various teaching strategies and desired student outcomes.	**4**	I would like to have more information on how this is done in the future.
Increase Graduation Rate with a goal of reaching 90% within the next 4 years.	**4**	The 94% graduation rate, but I am concerned about the pressure placed on principals and teachers to achieve this based on experience.

TOTAL SCORE: **_____3.55_____**

School Leadership Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• District leadership team meeting agendas and notes. • School level summary of principal use of data in determining staffing needs and placement. • Summary of school level use of teacher effectiveness data and teacher leaders. • Samples of staff and student recognition events at each school. • Nature, extent, and frequency of complaints or concerns voiced about subordinates within chain of command.	• Limited or no assignment of administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Limited or no opportunities to extend impact of high-performing teachers. • Clear criteria for recognition and celebration of schools and student performance and growth. • Shows limited or no use of the evaluation process and does not meet with administrators. • Repeated complaints or concerns being raised within chain of command, to include the Board.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Assigns administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Provides opportunities to extend impact of high performing teachers and administrators. • Creates and implements clear criteria for recognition of schools and students. • Ensures administrators provide structured feedback and use the evaluation process for professional learning and growth. • Uses evaluation data to determine trends.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Engages with administrators to review multiple data sources. • Creates a coherent system to extend impact of administrators. • Supports school rituals, traditions, and initiatives. • Builds and sustains a focused on continuous improvement. Creates a district-wide plan for professional learning aligned to the Board's vision for professional learning and growth.

School Leadership	Score	Comments
Develop competent leadership at the district level and school level through intentional leadership pipelines.	**3**	HCS has been hiring top level positions and principals from outside the district.
Leverages administrators' strengths to engage all students in meaningful, relevant learning opportunities while ensuring employees are accountable for job responsibilities.	**4**	I would like more information on this in the future.
Knowledgeable about the curriculum and establishes clear expectations for administrators.	**4**	Dr. Robertson seems to have a good relationship with most of our principals.
Supports professional learning activities for teachers and administrators.	**4**	The district-wide PD received a lot of negative feedback, but the one this year was organized more efficiently. I do not think this should be a yearly event, but maybe every few years.
Uses administrator evaluation data to inform, assess, and adjust professional learning, goals, and plans.	**4**	I would like to see the results from Feedback Surveys on a monthly basis from HCS Pulse checks.
Demonstrates use of system and staff evaluation data for personnel policies, decision-making, promotion of career growth, and professional development.	**3**	I think there has been a lack of staff evaluation data in some instances. It seems that if some employees are inefficient in a leadership or administrative role, then they are moved to a lateral position which is sometimes newly created for that employee. If employees are inefficient, it should be reflected in their evaluation.
Offers professional development that is focused on student learning consistent with the school district's vision, mission, and goals.	**3**	Professional development by content can be best administered in different locations where they can focus on their subject area and be led by leaders in that content.

TOTAL SCORE: **___3.57_____**

Community Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school district level website, newsletters, and surveys if available. • Examples of meeting agendas and schedules for parental involvement and community engagement. • Samples of school partnerships and partnership activities. • Samples of meetings and conversations with community partners and educators. • Donations and contributions to each school or the district.	Shows limited or no evidence of: • Welcoming and engaging families. • Offering timely, relevant, and accessible communication. • Providing district staff with sufficient resources needed to communicate regularly with families. • Creating flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Assessing community partners and resources. • Allocating fiscal, human, technological, and physical resources or allocates these with misalignment to the Board's vision, mission, and goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Welcomes and engages all families. • Offers opportunities for families to participate in school initiatives when applicable. • Provides district staff with sufficient resources needed to communicate regularly with families. • Creates flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Conducts an accurate assessment of community partners and resources. • Ensures accepted resources support the Board's vision, mission, and goals. • Allocates fiscal, human, technological, and physical resources to align with the Board's vision, mission, and goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements: • Establishes a two-way communication process for families that provides information about student progress and learning. • Supports family and community partnerships that are visible and sustainable. • Assesses potential community partners and secures additional resources that support the district. Highlights usage of resources and shares district accomplishments by regularly communicating with community partners.

Community Relationships	Score	Comments
Identifies multiple points of view for problem solving situations and involves stakeholders in decisions affecting the district.	**4**	I would like to know how we use the results from the Pulse checks? Do we receive feedback from the community newsletters?
Strategically utilizes community resources and established partnerships to support the Board's vision, mission, and goals.	**4**	The superintendent has done a great job in establishing many partnerships. But I would appreciate the board being better informed about the collaborations. For example, the board was not consulted about the YMCA partnership or the Future Fund. And what is the Children's Cabinet?

TOTAL SCORE: _____4_____

Business and Finance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of compliance with all financial audits including local, state, and federal. • Provide samples of both student and employee handbooks. • Provide samples of meeting with certified and noncertified staff on compliance with all Board policies and operating procedures. • Provide sample administrative procedures aligned with Board policy, state law, and federal requirements. • Board work session reports and agenda documents showing budgeting aligned with priorities.	• Rarely or never establishes, communicates, and enforces administrative procedures by: ○ Aligning them with Board policy, state law, and federal requirements. ○ Communicating established administrative procedures. ○ Ensuring administrators are accountable to the administrative procedures. • Rarely or never performs all budgetary responsibilities by: ○ Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Establishes, communicates, and enforces administrative procedures by: ○ Aligning them with Board policy, state law, and federal requirements. ○ Communicating established administrative procedures. ○ Ensuring administrators are accountable to the administrative procedures. • Performs timely, accurate, and transparent budgetary responsibilities by: ○ Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Leads administrators and staff in frequent reviews of administrative procedures to vet effectiveness and ensure the effective and efficient operation of the school district. • Leads administrators in frequent reviews of fiscal resource allocation to support the effective and efficient operation of the district.

Business and Finance	Score	Comments
Budget will be presented on time and in a transparent manner to both the board and community	**3**	The budget season was a little extended in part because the administration seemed reluctant to make some of the changes the board along with the community wanted.
Steps will be articulated and implemented to ensure school leaders are resourced to address unique needs of every school.	**4**	Some staffing in the staffing model should have been in the strategic plan instead of the base model.
Demonstrates budget management including financial forecasting, planning, cashflow management, account auditing, and monitoring and oversees the district's fiduciary responsibilities.	**4**	The finance staff does an excellent job in managing a very complex budget.
Provides accurate and timely reports to the Board on the financial condition of the school system.	**4**	The administration provides regular financial reports for the board.
Meets and works collaboratively with the Board and appropriate staff to determine budget priorities, including alignment with strategy and the effective allocation of resources.	**3**	I do not feel like the board was heard on some of our budget priorities. The special education department reorganization was a big disappointment and teachers were not given a step raise.

TOTAL SCORE: **_____3.6_____**

Board Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provides supporting documentation for each section of the director's evaluation instrument. • Samples of administrative procedures that adhere with Board policy.	• Inconsistently uses feedback from the Board to improve and demonstrates little evidence of growth. • Unprepared or disengaged with the Board and professional learning opportunities. • Engages in the evaluation process without evidence of focus on continuous improvement. • Self-reflections do not match the expectations of the Board of the director's evaluation instrument. • Inconsistently contributes to school district growth by failing to assist and mentor administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from the Board to implement personal and professional improvement strategies. • Prepared and engaged with the Board and professional learning opportunities. • Engages in the evaluation process with evidence of focus on improvement. • Contributes to the school district by assisting others, including at least two of the following. o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively participating in professional learning. • Building capacity for aspiring administrators.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Uses feedback from the Board to significantly improve performance. • Consistently prepared and highly engaged with the Board and in professional learning opportunities. • Engages in the evaluation process and seeks out feedback, matching the expectations of the Board and director's evaluation instrument. • Actively and consistently contributes to the school district by assisting and/or mentoring others, including: o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively leading professional learning. o Leading data-driven professional learning opportunities. o Building capacity for aspiring administrators.

Board Relationship	Score	Comments
Keeps board members informed on issues, needs, and operation of the school system.	4	The superintendent frequently notifies the board of serious events. He reaches out to the board individually as well. I would like to be informed of other activities as well as they occur like the YMCA partnership and Chiefs for Change affiliation.
Follows through on initiatives and strategies communicated to the Board of Education	5	The superintendent promptly carries out initiatives such as implementing the new cell phone policy.
Seeks and accepts constructive criticism of work from the Board	3	The superintendent is often receptive to criticism, but sometimes reacts defensively.
Interprets and executes the intent of Board policy through the development of administrative procedures	3	The superintendent often implements board policy, but it has been an adjustment as far as getting staffing approvals from the board.
Maintains/improves relations with the Board by consistent and appropriate interpersonal/professional interactions while making appropriate recommendations based on thorough analysis and study.	4	The superintendent has always maintained an open-door policy with me and communicates individually in a very respectful manner. He is usually very attentive to providing information when requested.

TOTAL SCORE: **_____3.8_____**

Staff and Personnel Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of district level plan for recruiting both professional and noncertified staff. • Samples of school level data regarding induction, support, retention, and growth of staff. • Samples of school level plans to increase the rates of high-performing educators and increase retention rates.	• Rarely or never inducts, supports, retains, and grows administrators by designing and implementing an induction program for new administrators and staff. • Rarely or never develops strategies for: o Retaining high-performing educators and administrators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Designs and implements an induction program for new administrators and staff. • Develops strategies for: o Retaining high-performing educators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of all administrators and staff.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	Engages with the district leadership team to: • Design and implement an induction program for new educators. • Develop strategies for retaining high-performing educators. • Develop strategies for fostering leadership skills in the most effective educators and administrators based on student outcomes. • Supports the development of all administrators utilizing a variety of methods.

Staff and Personnel Relationships	Score	Comments
95% of Certified Positions will be staffed by the 10th day of each year.	**5**	HCS exceeded the goal with 98.89% staffing by the 10th day.
90% of new teachers will be retained each year.	**3**	The New Teacher Academy helps with teacher retention.
Employee retention rates will exceed 85% each school year.	**5**	89% of employees were retained.
Collaborates with administrators to induct, support, retain, and grow effective educators based on evidence of student outcomes.	**4**	The LEAD program and other trainings support educators.
Develops appropriate structures to address staff morale based on district analysis.	**3**	Morale has been low in some circumstances. There was a lot of backlash when ex ed assistants and teachers were notified that they would not have a position at their school the following year. Other employees were suspended at times for over three months without pay or given a temporary placement.
Provides shared leadership and decision-making opportunities for staff that promotes a climate of collaboration and collegiality.	**2**	It seems like a select few are the ones who are making the decisions within central office and across the district.
Identifies and applies appropriate policies, criteria and processes for the recruitment, selection, induction, compensation, and separation of personnel.	**3**	The district works hard to recruit new employees, but we have not paid our current employees enough or

		supported them well at times. I am pleased with the increase in differentiated pay.
Evaluates the organizational structure of the district and reorganizes as necessary to achieve maximum effectiveness.	**3**	There are too many high-level positions in the central office staff. Each year the number of central office staff increases and employees promoted to new positions. Others are moved to new positions and replaced which increases the staff size even more.

TOTAL SCORE: **____3.5_____**

Integrity, Fairness, and Ethics Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provide samples of meetings and engagement with various stakeholders throughout the community. • Examples of meeting with teachers, staff, student groups, etc. outside of formal observations or staff meetings. • Examples of procedures that relate to communication plan for both certified and noncertified staff.	• Does not engage or limits engagement of stakeholder groups and does not seek input or feedback on district improvement. • Does not communicate expected values and beliefs to all staff. • Does not design or implement structures that increase shared ownership in district success. • Fails to establish high expectations for administrators' individual responsibility for district success.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Develops structures to encourage all stakeholders to provide input and feedback in district improvement decisions. • Communicates basic values and beliefs to all staff. • Models a commitment to the possibility of success for all students. • Designs and/or implements structures to increase shared ownership in district success. • Clearly and consistently communicates high expectations for administrators' individual responsibility for district success.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Develops capacity of administrators to implement structures for engaging all stakeholders to provide input and feedback in district improvement decisions. • Clearly communicates basic values and beliefs to all staff. • Enacts procedures that reflect a district-wide commitment to student success. • Clearly and consistently communicates administrators' individual responsibility for district success. Establishes a culture where all administrators address low expectations about student potential.

Integrity, Fairness, and Ethics	Score	Comments
Includes a varied set of administrators, educators, and stakeholders in district and school improvement decisions.	**4**	I am pleased with the involvement of the Student Leadership Council involvement. The Coffee Chats are a good idea, but would be better if moved to a time during school hours for better participation. At the central office level I will again point out that a select few make most of the decisions.
Models and communicates expectations for individual and shared ownership of student, educator, school, and district success.	**3**	In the October 2024 HCS Pulse Check Survey, only 45% of staff said they are contributing to setting their goals. Only 42% responded that they were recognized and celebrated.
Expects and emphasizes that all staff demonstrate integrity and exercise ethical behavior throughout the district.	**3**	Some of the decision making at the central office level does not seem fair. The new organization chart clearly showed sign of favoritism among senior leadership.
Treats people fairly, equally, and with dignity and respect.	**3**	Same as above. I will add that in the October 2024 Pulse Check that the top priorities for staff were compensation and benefits and employee satisfaction.

TOTAL SCORE: **___3.25_____**

Facilities and Safety Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school safety plans and/or school climate surveys. • Annual school level reporting of attendance rates and discipline referrals, including suspension and expulsion rates. • School district/county audits. • Examples of administrative procedures addressing finance and facilities.	• Expectations for resource allocation are not clearly aligned with the school district vision, mission, and goals. • District policies are not: o Clearly communicated. o Implemented consistently and fairly. o Related to students' safety. • Inadequate support for administrators to: o Analyze behavioral data to assess intervention and discipline effectiveness. • Use of data to adjust routines to maximize learning and decrease distractions.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Expectations for resource allocation are aligned with school district vision, mission, and goals. • District policies are: o Clearly communicated o Implemented consistently and fairly o Related to students' safety • Establishes practices that support: o Analyzing behavioral data to assess interventions and discipline effectiveness. o Use of data to adjust routines to maximize learning and decrease distractions. • Sufficient evidence that ensures administrators are adhering to expectations established in Board policy.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements ensures administrators: • Help set expectations for the learning environment and facilities that aligned with the school district vision, mission, and goals. • Review behavioral and discipline data to assess the effectiveness of interventions, adjusting when needed to ensure a safe learning environment.

Facilities/Safety	Score	Comments
Fosters a safe, respectful, and orderly learning environment for all.	**3**	There were issues with dangerous students in schools, but there was a reduction in repeat discipline infractions overall.
Demonstrates knowledge of school facilities and develops a process that builds public support for facility needs, including capital improvements.	**4**	The superintendent advocates for more funds for facilities. He obtained funds from the county in the form of bonds, and he oversaw the construction of Tyner Academy.
Ensures the maintenance of school property and the safety of personnel and property.	**4**	HCS received an 89.57 Summer Cleaning report card. The board receives regular updates on current building projects.

TOTAL SCORE: **____3.67_____**

District Management Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Director of Schools self-evaluation. • District's instructional and student supports plan along with professional development plans. • Summary as to what degree the district and schools met previous year's performance targets. • Artifacts of the district's performance aligned to state standards and accountability model. • Nature, extent, and frequency of concerns voiced by the Board regarding management level personnel	Rarely or never improves self-practice by: • Using feedback from sources to reflect on personal leadership practices and does not make any necessary changes for improvement. • Engaging in professional learning: ○ Aligned to student, educator, and self-need. ○ Focused on developing an understanding of performance expectations associated with state standards. • Implementing new, relevant learning from feedback and professional learning opportunities	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from a variety of sources to reflect on personal leadership practices and make any necessary changes for improvement. • Engages in professional learning aligned to student, educator, and self-need. • Develops an understanding of performance expectations associated with Tennessee Instructional Leader Standards. • Implements new, relevant learning from feedback and professional learning opportunities with evidence of improvement.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Actively seeks feedback from a variety of sources to reflect on personal leadership practices and makes any necessary changes for improvement. • Connects personal leadership practices to student achievement and administrator and educator performance by sharing his/her performance evaluation results with district staff. • Reflects on leadership alignment with core value and the Board's vision, mission, and goals.

District Management	Score	Comments
Ensures operational plans and procedures to achieve the vision, mission, and goals are in place.	**4**	Exceeds Expectations
Identifies, confronts, and resolves problems in a timely manner.	**4**	Exceeds Expectations
Recognizes, studies, and applies emerging trends as appropriate.	**4**	Exceeds Expectations
Uses effective communication skills.	**5**	The superintendent is very professional and uses superb communication skills.
Guides and directs upper-level district management in the performance of their job duties, accepts constructive criticism from the Board regarding same, and takes responsibility where appropriate.	**2**	The upper-level leadership seems very unbalanced. It is noticeable throughout the district.

TOTAL SCORE: **_____3.8_____**

Director of Schools Overall Evaluation Score

Total Mean Score Strategic Planning	**3.5**
Total Mean Score Student Achievement/Performance	**3.55**
Total Mean Score School Leadership	**3.57**
Total Mean Score Community Relationships	**4**
Total Mean Score Post-Secondary Opportunities	
Total Mean Score Business and Finance	**3.6**
Total Mean Score Board Relationship	**3.8**
Total Mean Score Staff and Personnel Relationships	**3.5**
Total Mean Score Integrity, Fairness, and Ethics	**3.25**
Total Mean Score Facilities/Safety	**3.67**
Total Mean Score District Management	**3.8**
Overall Mean Evaluation Score	**3.62**

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Print Name

Felice Hadden

Felice Hadden *11/30/25*

_____ _____

Signature **Date**

Hamilton County Board of Education

Evaluation Model for the Director of Hamilton County Schools

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Strategic Planning Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Agendas from district leadership and principal professional development. • District and school level goals for professional development related to student achievement, gap closure, college-career readiness, and growth. • District and School Improvement Plans that operationalize Opportunity 2030	Builds limited or no capacity for: • Developing administrators' understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to build administrator capacity.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Builds capacity among administrators for: • Developing an accurate understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources and instructional programs. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to improve instruction.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Communicates Opportunity 2030 to all staff. • Ensures the Board's vision, mission, and goals shape the educational programs, plans, and activities. • Actively monitors, evaluates, advises, and regularly updates the Board on Opportunity 2030

Strategic Planning	Score	Comments
Develop and implement Opportunity 2030 in collaboration with the school board to address key performance indicators on a yearly basis.	**5**	Each budget item and proposal has a connection to the priorities set forth by Opportunity 2030 which are clearly presented to the board.
Initiates communication and facilitates cooperation and collaboration among staff regarding Opportunity 2030.	**4**	Training programs for principals, assistant principals, and team leads ensures consistent, effective leadership in schools across the district.
Keeps the Board and community informed of progress towards goals set in Opportunity 2030.	**5**	Regular email updates to the community highlight accomplishments of schools around the district.
Ensures the vision shapes the educational programs, plans, and activities of the district.	**3**	School kickoff professional development is generally well-received.
Uses assessment data related to student learning to effectuate the Board's strategic plan.	**5**	This administration prioritizes data driven best practices to achieve positive outcomes and growth for students.
Leads the Board in recasting or reframing the vision as necessary based upon available data.	**5**	This board and this administration are careful to review and consider data and effectiveness of interventions and programs when evaluating the validity of programs during budget and operational discussions.

TOTAL SCORE: ____27_____

Student Assessment/Performance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Sample of school and district improvement plans with strategies. • District and school level TVAAS scores. • Data summary of all district and school level accountability metrics. • Performance and monitoring data of district wide sub-groups. • District plan for monitoring school improvement plans and student academic performance. • Review of district report card.	Shows limited or no use of: • Multiple student, educator, school-wide, and district-wide data. • Specific data when analyzing and tracking student progress. • Academic and behavioral growth goals. • Expectations for adjusting instructional programs based on data. • Shared accountability for decisions targeting student achievement and growth goals. • No observable alignment between interventions and student achievement. • Planning that addresses academic growth goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	Collaborates with administrators to: • Use multiple sources of student, educator, school and district-wide data. • Determine specific data to analyze when tracking student progress. • Establish specific strategies to meet or exceed academic and behavioral growth goals. • Communicate expectations for adjusting instruction programs in response to assessment data. • Establish shared accountability for instructional decisions targeting student achievement and growth goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Ensures administrators analyze and use multiple sources of student, educator, school and district-wide data. • Develops and monitors a district-wide data plan that includes: student progress tracking; strategies to meet or exceed growth and achievement goals; benchmark data; and data based changes to the instructional program. • Shared accountability for instructional decisions targeting achievement and growth goals. Establishes data-specific growth and achievement targets that result in gains

Student Achievement/Performance	Score	Comments
District Wide Value-Added will meet or exceed the State expectations each year.	**3**	Our district score of 3 meets expectations set by the state.
The percentage of students scoring below the 25th percentile will decrease by 2% each year.	**3**	We set this new goal this year, however districtwide literacy scores were lower than we hoped at a 2.
Collaborates with administrators to analyze and use multiple forms of data throughout the year to establish specific goals and strategies targeting student achievement and growth.	**5**	Investment in student support planning to support the whole child and attain highest student achievement possible.
Develops, monitors, and assesses district and school improvement plans, including the regular review and analysis of district test scores by school and sub-groups.	**5**	At every turn, this administration lets data lead decisions and analysis.
Leads administrators to develop and execute interventions that address all student learning needs based on multiple sources of data.	**5**	Superintendent and leadership staff encourage administrators and teachers to adjust techniques and strategies based on academic press and personalization.
Applies and communicates qualitative and quantitative findings to identify strengths and weaknesses in programs and practices in order to ensure continuous improvement.	**4**	Recommendations and presentations clearly connected to Opportunity 2030 priorities. Email blasts highlight stories to support programs.
Establishes systems for principals to regularly receive feedback on goal achievement and to assess ongoing school improvement efforts.	**3**	Supervision and consultation with community superintendents who directly supervise school administrators.
Encourages various staffing patterns, student grouping plans, class scheduling plans, school organizational structures, and facilities design processes to support various teaching strategies and desired student outcomes.	**5**	Current budgeting practices support a base staffing model that offers all students across HCS equitable access to services and resources, but also gives administrators autonomy to respond to the needs of their school
Increase Graduation Rate with a goal of reaching 90% within the next 4 years.	**5**	Graduation rate among HCS students is the highest in history.

TOTAL SCORE: _____38_____

School Leadership Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• District leadership team meeting agendas and notes. • School level summary of principal use of data in determining staffing needs and placement. • Summary of school level use of teacher effectiveness data and teacher leaders. • Samples of staff and student recognition events at each school. • Nature, extent, and frequency of complaints or concerns voiced about subordinates within chain of command.	• Limited or no assignment of administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Limited or no opportunities to extend impact of high-performing teachers. • Clear criteria for recognition and celebration of schools and student performance and growth. • Shows limited or no use of the evaluation process and does not meet with administrators. • Repeated complaints or concerns being raised within chain of command, to include the Board.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Assigns administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Provides opportunities to extend impact of high performing teachers and administrators. • Creates and implements clear criteria for recognition of schools and students. • Ensures administrators provide structured feedback and use the evaluation process for professional learning and growth. • Uses evaluation data to determine trends.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Engages with administrators to review multiple data sources. • Creates a coherent system to extend impact of administrators. • Supports school rituals, traditions, and initiatives. • Builds and sustains a focused on continuous improvement. Creates a district-wide plan for professional learning aligned to the Board's vision for professional learning and growth.

School Leadership	Score	Comments
Develop competent leadership at the district level and school level through intentional leadership pipelines.	**5**	Invests in and supports leadership training of principals, assistant principals, and team leads.
Leverages administrators' strengths to engage all students in meaningful, relevant learning opportunities while ensuring employees are accountable for job responsibilities.	**4**	Regular district-wide principal meetings and mentor programs support the strength and growth of new and seasoned administrators.
Knowledgeable about the curriculum and establishes clear expectations for administrators.	**4**	Curriculum guides and focus on meaningful tasks to keep students engaged with learning and regular support at all levels from superindent and staff
Supports professional learning activities for teachers and administrators.	**4**	Recent complaints from teachers around support on PD days and planning addressed and calendar adjusted.
Uses administrator evaluation data to inform, assess, and adjust professional learning, goals, and plans.	**5**	Academic press and personalization focus brings principal and teacher focus back to student learning in a concrete way with tangible strategies.
Demonstrates use of system and staff evaluation data for personnel policies, decision-making, promotion of career growth, and professional development.	**5**	Uses pulse checks to garner data and be responsive to staff needs.
Offers professional development that is focused on student learning consistent with the school district's vision, mission, and goals.	**4**	Listens to teacher and staff feedback in regards to professional development and adjusts calendar and strategies to respond to and support educators.

TOTAL SCORE: _____31_____

Community Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school district level website, newsletters, and surveys if available. • Examples of meeting agendas and schedules for parental involvement and community engagement. • Samples of school partnerships and partnership activities. • Samples of meetings and conversations with community partners and educators. • Donations and contributions to each school or the district.	Shows limited or no evidence of: • Welcoming and engaging families. • Offering timely, relevant, and accessible communication. • Providing district staff with sufficient resources needed to communicate regularly with families. • Creating flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Assessing community partners and resources. • Allocating fiscal, human, technological, and physical resources or allocates these with misalignment to the Board's vision, mission, and goals.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Welcomes and engages all families. • Offers opportunities for families to participate in school initiatives when applicable. • Provides district staff with sufficient resources needed to communicate regularly with families. • Creates flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Conducts an accurate assessment of community partners and resources. • Ensures accepted resources support the Board's vision, mission, and goals. • Allocates fiscal, human, technological, and physical resources to align with the Board's vision, mission, and goals.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements: • Establishes a two-way communication process for families that provides information about student progress and learning. • Supports family and community partnerships that are visible and sustainable. • Assesses potential community partners and secures additional resources that support the district. Highlights usage of resources and shares district accomplishments by regularly communicating with community partners.

Community Relationships	Score	Comments
Identifies multiple points of view for problem solving situations and involves stakeholders in decisions affecting the district.	**4**	Involvement of stakeholders like students and parents through advisory councils has improved over previous years. Student Board Members are more engaged than previous years as well.
Strategically utilizes community resources and established partnerships to support the Board's vision, mission, and goals.	**5**	HCS partnership with private business through our Future Ready Institutes and other municipal governments (City of Chattanooga) through Community Forward are just two of many examples of HCS engagement with stakeholders.

TOTAL SCORE: ____9_____

Business and Finance Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of compliance with all financial audits including local, state, and federal. • Provide samples of both student and employee handbooks. • Provide samples of meeting with certified and noncertified staff on compliance with all Board policies and operating procedures. • Provide sample administrative procedures aligned with Board policy, state law, and federal requirements. • Board work session reports and agenda documents showing budgeting aligned with priorities.	• Rarely or never establishes, communicates, and enforces administrative procedures by: ○ Aligning them with Board policy, state law, and federal requirements. ○ Communicating established administrative procedures. ○ Ensuring administrators are accountable to the administrative procedures. • Rarely or never performs all budgetary responsibilities by: ○ Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Establishes, communicates, and enforces administrative procedures by: ○ Aligning them with Board policy, state law, and federal requirements. ○ Communicating established administrative procedures. ○ Ensuring administrators are accountable to the administrative procedures. • Performs timely, accurate, and transparent budgetary responsibilities by: ○ Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Leads administrators and staff in frequent reviews of administrative procedures to vet effectiveness and ensure the effective and efficient operation of the school district. • Leads administrators in frequent reviews of fiscal resource allocation to support the effective and efficient operation of the district.

Business and Finance	Score	Comments
Budget will be presented on time and in a transparent manner to both the board and community	**4**	Budget meetings in Spring 2025 had a clear timeline and included 1:1 discussions with board members. Listening events hosted to address community concerns and give Board Members the opportunity to hear from parents, teachers and other stakeholders directly.
Steps will be articulated and implemented to ensure school leaders are resourced to address unique needs of every school.	**5**	The consistent use of staffing model to equitably resource schools PLUS strategic staffing dollars allows principals to respond to the specific needs of their school community appropriately.
Demonstrates budget management including financial forecasting, planning, cashflow management, account auditing, and monitoring and oversees the district's fiduciary responsibilities.	**4**	District uses conservative projections of revenue from local government to guide budget and staffing decisions. The numbers given do not always materialize.
Provides accurate and timely reports to the Board on the financial condition of the school system.	**2**	We should get more frequent snapshots of budget throughout the year.
Meets and works collaboratively with the Board and appropriate staff to determine budget priorities, including alignment with strategy and the effective allocation of resources.	**4**	This administration showed responsiveness to board and community concerns during previous budget cycle and cuts discussions.

TOTAL SCORE: _____19_____

Board Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provides supporting documentation for each section of the director's evaluation instrument. • Samples of administrative procedures that adhere with Board policy.	• Inconsistently uses feedback from the Board to improve and demonstrates little evidence of growth. • Unprepared or disengaged with the Board and professional learning opportunities. • Engages in the evaluation process without evidence of focus on continuous improvement. • Self-reflections do not match the expectations of the Board of the director's evaluation instrument. • Inconsistently contributes to school district growth by failing to assist and mentor administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from the Board to implement personal and professional improvement strategies. • Prepared and engaged with the Board and professional learning opportunities. • Engages in the evaluation process with evidence of focus on improvement. • Contributes to the school district by assisting others, including at least two of the following. o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively participating in professional learning. • Building capacity for aspiring administrators.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Uses feedback from the Board to significantly improve performance. • Consistently prepared and highly engaged with the Board and in professional learning opportunities. • Engages in the evaluation process and seeks out feedback, matching the expectations of the Board and director's evaluation instrument. • Actively and consistently contributes to the school district by assisting and/or mentoring others, including: o Collaborative planning with administrators and staff to execute Board policies and decisions. o Actively leading professional learning. o Leading data-driven professional learning opportunities. o Building capacity for aspiring administrators.

Board Relationship	Score	Comments
Keeps board members informed on issues, needs, and operation of the school system.	**4**	Presentations at monthly meetings and individual check-ins keep this board member informed of needs of the whole system and those in their district.
Follows through on initiatives and strategies communicated to the Board of Education	**5**	Superintendent demonstrates focus on student success, staff support, and long-term vision guided by priorities of strategic plan and willingness to address ongoing needs such as facilities maintenance.
Seeks and accepts constructive criticism of work from the Board	**3**	Demonstrates willingness to listen and respond to concerns of board and community.
Interprets and executes the intent of Board policy through the development of administrative procedures	**3**	Effectively implements board policy changes with reasonable roll-out (cell phone policy).

Maintains/improves relations with the Board by consistent and appropriate interpersonal/professional interactions while making appropriate recommendations based on thorough analysis and study.	**4**	Frequent 1:1 check-ins, and phone calls keep board apprised of relevant developments within system. Initiates discussion in response to community concerns and press to keep board informed.

TOTAL SCORE: **_____19_____**

Staff and Personnel Relationship Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Samples of district level plan for recruiting both professional and noncertified staff. • Samples of school level data regarding induction, support, retention, and growth of staff. • Samples of school level plans to increase the rates of high-performing educators and increase retention rates.	• Rarely or never inducts, supports, retains, and grows administrators by designing and implementing an induction program for new administrators and staff. • Rarely or never develops strategies for: o Retaining high-performing educators and administrators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of administrators.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Designs and implements an induction program for new administrators and staff. • Develops strategies for: o Retaining high-performing educators. o Fostering leadership skills in the most effective educators and administrators based on student outcomes. • Utilizing a variety of methods to support the development of all administrators and staff.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	Engages with the district leadership team to: • Design and implement an induction program for new educators. • Develop strategies for retaining high-performing educators. • Develop strategies for fostering leadership skills in the most effective educators and administrators based on student outcomes. • Supports the development of all administrators utilizing a variety of methods.

Staff and Personnel Relationships	Score	Comments
95% of Certified Positions will be staffed by the 10th day of each year.	**5**	Goal exceeded with 98.8% postitions staffed by 10th day.
90% of new teachers will be retained each year.	**3**	Goal just met with 89.7% of 1st-3rd year teachers retained
Employee retention rates will exceed 85% each school year.	**5**	Goal exceeded with 89% staff retention.
Collaborates with administrators to induct, support, retain, and grow effective educators based on evidence of student outcomes.	**4**	Mentor programs and consistent annual employee evaluations support effective staff retention.
Develops appropriate structures to address staff morale based on district analysis.	**4**	Administration uses frequent staff surveys through Gallup to respond to staff concerns

Provides shared leadership and decision-making opportunities for staff that promotes a climate of collaboration and collegiality.	**5**	Works with HCEA through PECCA process to support collaboration with staff regarding contract.
Identifies and applies appropriate policies, criteria and processes for the recruitment, selection, induction, compensation, and separation of personnel.	**4**	This administration shows consistent effort over the years to address pay inequity for all staff.
Evaluates the organizational structure of the district and reorganizes as necessary to achieve maximum effectiveness.	**5**	This administration's intentional overhaul and adjustment of staffing and funding models to equitably resource schools shows their commitment to effectiveness and fiscal responsibility by ensuring the best outcomes for each dollar spent.

TOTAL SCORE: **_____35_____**

Integrity, Fairness, and Ethics Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Provide samples of meetings and engagement with various stakeholders throughout the community. • Examples of meeting with teachers, staff, student groups, etc. outside of formal observations or staff meetings. • Examples of procedures that relate to communication plan for both certified and noncertified staff.	• Does not engage or limits engagement of stakeholder groups and does not seek input or feedback on district improvement. • Does not communicate expected values and beliefs to all staff. • Does not design or implement structures that increase shared ownership in district success. • Fails to establish high expectations for administrators' individual responsibility for district success.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Develops structures to encourage all stakeholders to provide input and feedback in district improvement decisions. • Communicates basic values and beliefs to all staff. • Models a commitment to the possibility of success for all students. • Designs and/or implements structures to increase shared ownership in district success. • Clearly and consistently communicates high expectations for administrators' individual responsibility for district success.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Develops capacity of administrators to implement structures for engaging all stakeholders to provide input and feedback in district improvement decisions. • Clearly communicates basic values and beliefs to all staff. • Enacts procedures that reflect a district-wide commitment to student success. • Clearly and consistently communicates administrators' individual responsibility for district success. Establishes a culture where all administrators address low expectations about student potential.

Integrity, Fairness, and Ethics	Score	Comments
Includes a varied set of administrators, educators, and stakeholders in district and school improvement decisions.	**5**	Assembled different advisory groups and working groups of community stakeholders board members, teachers, parents, and students to make decisions on curriculum (classroom teachers), strategic planning, facilities improvement planning, and policy.
Models and communicates expectations for individual and shared ownership of student, educator, school, and district success.	**4**	Constant flow of communication and feedback between parent surveys, staff surveys, student data, board presentations, board decisions, administrative decisions and back again help foster culture of buy-in.
Expects and emphasizes that all staff demonstrate integrity and exercise ethical behavior throughout the district.	**4**	Quick response to difficult issues at school level in addition to regular evaluations and accountability through HR process sets high standards district-wide.
Treats people fairly, equally, and with dignity and respect.	**5**	Demonstrates strict and consistent adherence to personnel policy

TOTAL SCORE: **____18_____**

Facilities and Safety Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Examples of school safety plans and/or school climate surveys. • Annual school level reporting of attendance rates and discipline referrals, including suspension and expulsion rates. • School district/county audits. • Examples of administrative procedures addressing finance and facilities.	• Expectations for resource allocation are not clearly aligned with the school district vision, mission, and goals. • District policies are not: o Clearly communicated. o Implemented consistently and fairly. o Related to students' safety. • Inadequate support for administrators to: o Analyze behavioral data to assess intervention and discipline effectiveness. • Use of data to adjust routines to maximize learning and decrease distractions.	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Expectations for resource allocation are aligned with school district vision, mission, and goals. • District policies are: o Clearly communicated o Implemented consistently and fairly o Related to students' safety • Establishes practices that support: o Analyzing behavioral data to assess interventions and discipline effectiveness. o Use of data to adjust routines to maximize learning and decrease distractions. • Sufficient evidence that ensures administrators are adhering to expectations established in Board policy.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements ensures administrators: • Help set expectations for the learning environment and facilities that aligned with the school district vision, mission, and goals. • Review behavioral and discipline data to assess the effectiveness of interventions, adjusting when needed to ensure a safe learning environment.

Facilities/Safety	Score	Comments
Fosters a safe, respectful, and orderly learning environment for all.	**5**	Demonstrates commitment to safety as highest priority and pushing to address inequity in facilities through regular maintenance as well as capital projects.
Demonstrates knowledge of school facilities and develops a process that builds public support for facility needs, including capital improvements.	**5**	Most recent facilities plan developed with input from county government, community stakeholders, board, administration, and community at large through a transparent feedback and decision-making process (once the board took recommendations from the working group).
Ensures the maintenance of school property and the safety of personnel and property.	**4**	Addressing long-standing facilities needs has been a priority for this administration.

TOTAL SCORE: _____14_____

District Management Rubric

Sources of Evidence	Level 1: Significantly Below Expectations	Level 2: Below Expectations	Level 3: At Expectations	Level 4: Above Expectations	Level 5: Significantly Above Expectations
• Director of Schools self-evaluation. • District's instructional and student supports plan along with professional development plans. • Summary as to what degree the district and schools met previous year's performance targets. • Artifacts of the district's performance aligned to state standards and accountability model. • Nature, extent, and frequency of concerns voiced by the Board regarding management level personnel	Rarely or never improves self-practice by: • Using feedback from sources to reflect on personal leadership practices and does not make any necessary changes for improvement. • Engaging in professional learning: o Aligned to student, educator, and self-need. o Focused on developing an understanding of performance expectations associated with state standards. • Implementing new, relevant learning from feedback and professional learning opportunities	• Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from a variety of sources to reflect on personal leadership practices and make any necessary changes for improvement. • Engages in professional learning aligned to student, educator, and self-need. • Develops an understanding of performance expectations associated with Tennessee Instructional Leader Standards. • Implements new, relevant learning from feedback and professional learning opportunities with evidence of improvement.	• Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Actively seeks feedback from a variety of sources to reflect on personal leadership practices and makes any necessary changes for improvement. • Connects personal leadership practices to student achievement and administrator and educator performance by sharing his/her performance evaluation results with district staff. • Reflects on leadership alignment with core value and the Board's vision, mission, and goals.

District Management	Score	Comments
Ensures operational plans and procedures to achieve the vision, mission, and goals are in place.	**4**	Learning communities provides structural framework for operational support of schools through community superintendents.
Identifies, confronts, and resolves problems in a timely manner.	**4**	Administration is responsive to issues at the school level and communicates quickly with the board on
Recognizes, studies, and applies emerging trends as appropriate.	**5**	Superintendent is active in state and nationwide professional organizations for school superintendents to share ideas, best practices, trends, and concerns.
Uses effective communication skills.	**4**	Superintendent is always professional in communication. This is an area that always has room for growth and improvement.

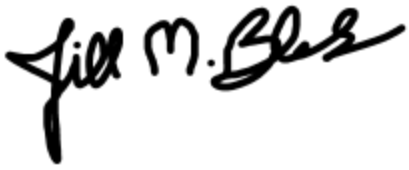
Guides and directs upper-level district management in the performance of their job duties, accepts constructive criticism from the Board regarding same, and takes responsibility where appropriate.	**4**	This administration has built a structure of feedback and support to optimize student achievement and staff satisfaction. They have prioritized leadership development and support through training and mentor programs.

TOTAL SCORE: **_____21_____**

Director of Schools Overall Evaluation Score

Total Mean Score Strategic Planning	**4.5**
Total Mean Score Student Achievement/Performance	**4.2**
Total Mean Score School Leadership	**4.4**
Total Mean Score Community Relationships	**4.5**
Total Mean Score Post-Secondary Opportunities	**Missing section**
Total Mean Score Business and Finance	**3.8**
Total Mean Score Board Relationship	**3.8**
Total Mean Score Staff and Personnel Relationships	**4.4**
Total Mean Score Integrity, Fairness, and Ethics	**4.5**
Total Mean Score Facilities/Safety	**4.7**
Total Mean Score District Management	**4.2**
Overall Mean Evaluation Score	**4.3**

____Jill M. Black_____
Print Name



_____ **__12/1/2025_____**
Signature **Date**

HAMILTON COUNTY SCHOOLS

SUPERINTENDENT'S 24-25 SELF EVALUATION

Prepared for the
Hamilton County Board of Education
by Dr. Justin Robertson

FROM THE SUPERINTENDENT

The 2024-2025 school year marked real progress for Hamilton County Schools as we continue moving forward on the priorities outlined in *Opportunity 2030*. What inspires me most isn't a single initiative or milestone, but the people. Every day, I see educators, leaders, and staff keeping students at the center of their work. Their commitment, grounded in excellence, integrity, and care, is transforming what opportunity looks like for children across our community.

This year reminded me what's possible when we work together with focus and consistency. We've strengthened early literacy and math instruction, expanded access to CTE pathways through our Future Ready Centers, and improved supports during key transition years. We've also prioritized student connections, understanding that success in the classroom is built on strong relationships and supportive school environments. Throughout the last school year, I saw countless examples of teachers and staff creating intentional opportunities for students to get to know their peers and the adults in their schools as individuals. My favorite school year memories are always tied to my interactions with our students, and I've seen firsthand how they light up when they find a class, an extracurricular activity, or a teacher that truly connects with them.

Overall, we've made meaningful progress in aligning resources, addressing long-standing deferred maintenance needs, and improving working conditions for staff, and we continue to see improvements in student growth and achievement. Our teachers, school leaders, and centralized support staff remain the driving force behind everything we've achieved. Their professionalism and passion continue to build confidence in the future of this district.

As we look ahead, we must maintain a focus on continuous improvement by building on this momentum and doubling down on what we can see is working – not by introducing something new or different. At the same time, the need to advocate for sustainable funding remains urgent, especially if we want to stay competitive on wages and continue making smart, long-term investments in our schools to provide the best facilities and resources to our students as possible.

I'm thankful for this Board's leadership and partnership. While we may approach challenges from different perspectives, our shared purpose remains clear: ensuring that every student in Hamilton County Schools graduates prepared for success in college, career, and life. The progress we're seeing reflects that shared commitment, and a belief that public education can – and must – be a place where every child's future is without limits.

Thank you for your continued dedication to this work,

Justin Robertson

SCORECARD - AT A GLANCE

DOMAIN	SELF SCORE	SOURCES OF EVIDENCE
Strategic Planning	4.2	• Opportunity 2030 Board Updates • School & Department Action Plan Template • Strategic Project Oversight one-pagers
Student Achievement	4.1	• School and Classroom Level Dashboards • Quarterly Data Meetings • Academic Press & Personalization Dashboard
School Leadership	4.3	• Professional Development Calendars • Professional Learning Conference • Instructional Framework Documents
Community Relationships	4.5	• Community budget planning feedback • Better Together partnership opportunities • Updated school websites showcasing individual community pride
Business & Finance	4.2	• Public HCS Budget Records • Internal School Funds Financial Statements and Audit Reports • Comprehensive Staff Communication regarding Budgeting
Board Relationship	3.8	• Weekly Board Update • Board Retreat Agenda • TSBA convenings
Staff & Personnel Relationship	4.1	• Induction & New Teacher Coach Resources • Gallup Survey Results - Engagement score increase • Staff Communication - The Pulse
Integrity, Fairness, & Ethics	4.3	• Pulse Check Surveys • Student Leadership Council • HCS Slide Deck Template
Facilities & Safety	4.0	• Progression on Facilities Bond priorities • Deferred Maintenance Bond Update • Decreased repeat discipline infraction data
District Management	4.0	• TDOE and TOSS professional learning • Talent Toolkit for Administrators • Connecting personal leadership through State of the System

STRATEGIC PLANNING

OVERVIEW OF SELF SCORE

What does the evidence say?

I have consistently kept the Board, staff, and community informed on progress toward Opportunity 2030. Through regular Board updates, I have shared key metrics and milestones. School and Department Action Plan Templates show how leaders are aligning instructional work to district goals. I've also used Strategic Project Oversight one-pagers to highlight how I have managed top initiatives using business principles to drive progress and ensure shared accountability across departments. Opportunity is created by design through intentional, coherent work throughout the district. Opportunity 2030 grounds our work.

Opportunities and Next Steps

As we move into our second year together, I'm focused on partnering with the Board to define clear goals, actions, and metrics connected to governance. These steps will strengthen alignment with the Board's vision and ensure Opportunity 2030 continues to shape planning and decision-making. I believe creating a more defined structure will also enhance communication with the community and support timely, data-informed adjustments. Utilizing Opportunity 2030 as a through line to the Board's goals will create more clarity for the board and administration.

RUBRIC

LEVEL 1 - SIGNIFICANTLY BELOW EXPECTATIONS	*LEVEL 2 - BELOW EXPECTATIONS*	*LEVEL 3 - AT EXPECTATIONS*	*LEVEL 4 - ABOVE EXPECTATIONS*	*LEVEL 5 - SIGNIFICANTLY ABOVE EXPECTATIONS*
Builds limited or no capacity for: • Developing administrator's understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to build administrator capacity.	Exceeds Level 1 rubric but does not meet Level 3 rubric.	Builds capacity among administrators for: • Developing an accurate understanding of state adopted standards and instructional practice. • Demonstrating fidelity to state and district-approved standards and curriculum. • Studying, analyzing, and evaluating approved curriculum resources and instructional programs. • Establishing a system for monitoring student achievement. • Establishing collective accountability when making needed adjustments to improve instruction.	Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Communicates Opportunity 2030 to all staff. • Ensures the Board's vision, mission, and goals shape the educational programs, plans, and activities. • Actively monitors and evaluates, advises, and regularly updates the Board on Opportunity 2030.

STRATEGIC PLANNING

CATEGORIES	*SELF SCORE*	*SUPPORTING ACTIVITIES*
Develop and implement Opportunity 2030 with the school board to address key performance indicators on a yearly basis	4	• Opportunity 2030 - objectives, strategies, and metrics • Public tracking of Opportunity 2030 progress to yearly metrics through Opportunity 2030 Board Updates • Development of a new performance document, aligned to the board-specified Opportunity 2030 metrics for more intensive tracking each year.
Initiates communication and facilitates cooperation and collaboration among staff regarding Opportunity 2030	5	• Alignment at Principal's Leadership Institute, Principal Launch, and all Principal's Meetings; All Hands Quarterly Staff Meetings; Senior Leadership & Extended Senior Leadership Retreats • Departmental Action plans are shared across Extended SLT in July and January
Keeps the Board and community informed of progress towards goals set in Opportunity 2030	4	• Presentations to the School Board (Opportunity 2030 Overview in October; Commitment-focused presentations throughout the year) • Strategic Project one-pagers provided throughout the year • State of the System
Ensures the vision shapes the educational programs, plans, and activities of the district.	5	• Continued implementation of the Strategic Project Oversight process • School Action Plans & Department Action Plans aligned to Opportunity 2030 • Priority-based budgeting aligned to Opportunity 2030
Uses assessment data related to student learning to effectuate the Board's strategic plan.	4	• Data & Accountability team leads review process with district leadership and school leadership • Data & Accountability team maintains Cognos Dashboards for school & district leaders, teachers, and the Board
Leads the Board in recasting or reframing the vision as necessary based upon available data.	3	• School Board Retreat • Revisiting School Board Goals policy

Total Score: 25/30 – **Overall Rating: 4.2**

STUDENT ACHIEVEMENT / PERFORMANCE

OVERVIEW OF SELF SCORE

What does the evidence say?

A healthy school system is one that is consistently meeting growth expectations while making improvements in achievement. Achievement scores in 24-25 improved in every subject area, with a four-year improvement in Math of 7.6% and 8% in ELA. The district met or exceeded expectations in growth for a third consecutive year. The implementation of Literacy First in K-2 to ensure strong foundations for literacy are established for our early learners. Continued focus on Academic Press and Personalization provides a consistent framework across the district while allowing flexibility through specific areas of focus for each school.

Opportunities and Next Steps

Improving outcomes for our Middle School students is a priority, as we have seen less progress overall in the middle grades. Our system has seen success through our 9th-grade transition work, and I plan to adapt those lessons to better support the middle school transitions. Additionally, I recognize that our highest-achieving students are not growing at the same rate as their peers statewide, and I will continue working with teams to address this gap.

RUBRIC

LEVEL 1 - SIGNIFICANTLY BELOW EXPECTATIONS	*LEVEL 2 - BELOW EXPECTATIONS*	*LEVEL 3 - AT EXPECTATIONS*	*LEVEL 4 - ABOVE EXPECTATIONS*	*LEVEL 5 - SIGNIFICANTLY ABOVE EXPECTATIONS*
Shows limited or no use of: • Multiple student, educator, school-wide, and district-wide data. • Specific data when analyzing and tracking student progress. • Academic and behavioral growth goals. • Expectations for adjusting instructional programs based on data. • Shared accountability for decisions targeting student achievement and growth goals. • No observable alignment between interventions and student achievement. • Planning that addresses academic growth goals.	Exceeds Level 1 rubric but does not meet Level 3 rubric.	Collaborates with administrators to: • Use multiple sources of student, educator, school and district-wide data • Determine specific data to analyze when tracking student progress. • Establish specific strategies to meet or exceed academic and behavioral growth goals. • Communicate expectations for adjusting instruction programs in response to assessment data. • Establish shared accountability for instructional decisions targeting student achievement and growth goals	Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Ensures administrators analyze and use multiple sources of student, educator, school and district-wide data • Develops and monitors a district-wide data plan that includes: student progress tracking; strategies to meet or exceed growth and achievement goals; benchmark data; and data based changes to the instructional program. • Shared accountability for instructional decisions targeting achievement and growth goals. • Establishes data-specific growth and achievement targets that result in gains

STUDENT ACHIEVEMENT/PERFORMANCE

CATEGORIES	*SELF SCORE*	*SUPPORTING ACTIVITIES*
District Wide Value-Added will meet or exceed the State expectations each year.	3	• District-wide TVAAS score of 3, meeting state expectations
The percentage of students scoring below the 25th percentile will decrease by 2% each year.	3	• Aims Web and MAP Screener data • Resetting baseline in 25-26 school year
Collaborates with administrators to analyze and use multiple forms of data throughout the year to establish specific goals and strategies targeting student achievement and growth.	5	• School dashboards in Cognos • Academic Touchpoint Quarterly Data Review meetings ◦ TCAP/TVAAS data, Universal Screener data, Attendance, Discipline, Graduation Cohort, K-2 curriculum data • Review of APP Dashboard
Develops, monitors, and assesses district and school improvement plans, including the regular review and analysis for district test scores by school and sub-groups.	5	• District Data Reviews • Learning Community Data Reviews • School Data Reviews • Continuous Improvement Cycles based on learning walk recommendations
Leads administrators to develop and execute interventions that address all student learning needs based on multiple sources of data.	4	• RTI Implementation • Literacy First • Literacy Now • Freshman Success Academy • Tier 1 First • Sustain & Extend Plans
Applies and communicates qualitative and quantitative findings to identify strengths and weaknesses in programs and practices in order to ensure continuous improvement.	3	• Strategic Project Oversight evaluations • Opportunity 2030 board updates • Weekly board updates
Establishes systems for principals to regularly receive feedback on goal achievement and to assess ongoing school improvement efforts.	5	• Quarterly Academic Touchpoints • Academic Press and Personalization (APP) Framework & walkthrough protocol • Monthly 1-1's between principal and community superintendent • Mid-year conferences • Summative evaluation
Encourages various staffing patterns, student grouping plans, class scheduling plans, school organizational structures, and facilities design processes to support various teaching strategies and desired student outcomes.	4	• School staffing model • Master scheduling guardrails • RTI2A and B (academic and behavior) grouping intervention plans
Increase Graduation Rate with a goal of reaching 90% within the next 4 years.	5	• 94% graduation rate - 2025 graduates

Total Score: 37/45 – **Overall Rating: 4.1**

SCHOOL LEADERSHIP

OVERVIEW OF SELF SCORE

What does the evidence say?

I have led strong planning and execution of professional learning across the district. Our Professional Development Calendars and Learning Conference reflect high-quality, well-organized opportunities for leaders at all levels. Instructional Framework documents demonstrate our alignment between professional learning and instructional expectations. These resources show my focus on building a coherent, districtwide system for continuous improvement aligned to the Board's vision while also creating opportunity for autonomy based on the needs of each school.

Opportunities and Next Steps

As I reflect on this area, I see an opportunity to more strategically use evaluation data to shape targeted professional learning for school leaders. I plan to increase engagement with administrators in data review cycles to better identify learning trends and adjust supports. Additionally, I will strengthen coordination with the Hamilton County Principals Association to ensure ongoing alignment, collaboration, and shared ownership in supporting principal growth. This work will ensure that our leadership development efforts remain personalized and aligned to each school's specific needs.

RUBRIC

LEVEL 1 - SIGNIFICANTLY BELOW EXPECTATIONS	*LEVEL 2 - BELOW EXPECTATIONS*	*LEVEL 3 - AT EXPECTATIONS*	*LEVEL 4 - ABOVE EXPECTATIONS*	*LEVEL 5 - SIGNIFICANTLY ABOVE EXPECTATIONS*
• Limited or no assignment of administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Limited or no opportunities to extend impact of high-performing teachers. • Clear criteria for recognition and celebration of schools and student performance and growth. • Shows limited or no use of the evaluation process and does not meet with administrators. • Repeated complaints or concerns being raised within chain of command, to include the Board	Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Assigns administrators based on student learning needs, demonstrated effectiveness, and Board and district goals. • Provides opportunities to extend impact of high performing teachers and administrators. • Creates and implements clear criteria for recognition of schools and students. • Ensures administrators provide structured feedback and use the evaluation process for professional learning and growth. • Uses evaluation data to determine trends.	Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Engages with administrators to review multiple data sources. • Creates a coherent system to extend the impact of administrators. • Supports school rituals, traditions, and initiatives. • Builds and sustains a focus on continuous improvement. • Creates a district-wide plan for professional learning aligned to the Board's vision for professional learning and growth.

SCHOOL LEADERSHIP

CATEGORIES	*SELF SCORE*	*SUPPORTING ACTIVITIES*
Develop competent leadership at the district level and school level through intentional leadership pipelines.	4	• LEAD programs ◦ Aspiring Principal, Assistant Principal, Instructional Coach, Teacher Leader, Aspiring Manager • Professional Development Calendars (School Leadership, Student Support, Instructional)
Leverages adminstrators' strengths to engage all students in meaningful, relevant learning opportunities while ensuring employees are accountable for job responsibilities.	5	• Excellence Exposed section of Principal Meetings • Principal Consultancies • Leaders on Tour • Principal Mentors
Knowledgeable about the curriculum and establishes clear expectations for administrators.	4	• Curriculum Guides • Instructional Framework Documents • Deep Dive Instructional Focused Principal Learning Day (Ex. Science Curriculum adoption and use) • School Leadership Framework
Supports professional learning activities for teachers and administrators.	5	• Professional Learning Conference • District-wide PD days • Principal meetings • Principal Professional Learning Calendar • District Calendar w district and school-based PD opportunities • Summer Learning Calendar

Uses administrator evaluation data to inform, assess, and adjust professional learning, goals, and plans.	4	• Academic Press & Personalization walkthrough data reviews.
		• Summer Learning
		  ◦ Principal Leadership Institute
		  ◦ Principal Launch
		• Summative Evaluations
		• 360 Feedback Survey's

Demonstrates use of system and staff evaluation data for personnel policies, decision-making, promotion of career growth, and professional development.	4	• Staff evaluation rubrics • Leader evaluation rubric • School Leadership Framework • Gallup Engagement Survey Results
Offers professional development that is focused on student learning, consistent with the school district's vision, mission, and goals.	4	• Professional Learning calendars for multiple stakeholder groups • Professional Development Days

Total Score: 30/35 – **Overall Rating: 4.3**

COMMUNITY RELATIONSHIPS

OVERVIEW OF SELF SCORE

What does the evidence say?

I've prioritized transparent communication and meaningful partnerships with our community. Through community budget planning sessions, I've offered stakeholders real opportunities to influence key governance decisions. Updated school websites now highlight the identity and pride of individual school communities. Through the Better Together initiative, I've supported strengthened sustainable partnerships that bring new resources into our schools and align directly with our strategic goals.

Opportunities and Next Steps

Looking ahead, I plan to deepen two-way communication with families and partners by creating more structured, ongoing feedback opportunities. By building in regular space for listening and collaboration, I aim to stay closely aligned with community needs and values while strengthening trust and responsiveness.

RUBRIC

LEVEL 1 - SIGNIFICANTLY BELOW EXPECTATIONS	*LEVEL 2 - BELOW EXPECTATIONS*	*LEVEL 3 - AT EXPECTATIONS*	*LEVEL 4 - ABOVE EXPECTATIONS*	*LEVEL 5 - SIGNIFICANTLY ABOVE EXPECTATIONS*
Shows limited or no evidence of: • Welcoming and engaging families. • Offering timely, relevant, and accessible communication. • Providing district staff with sufficient resources needed to communicate regularly with families. • Creating flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Assessing community partners and resources. • Allocating fiscal, human, technological, and physical resources or allocates these with misalignment to the Board's vision, mission, and goals.	Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Welcomes and engages all families. • Offers opportunities for families to participate in school initiatives with applicable. • Provides district staff with sufficient resources needed to communicate regularly with families. • Creates flexible scheduling for meetings, gatherings, and celebrations in response to parent needs. • Conducts an accurate assessment of community partners and resources. • Ensures accepted resources support the Board's vision, mission, and goals. • Allocates fiscal, human, technological, and physical resources to align with the Board's vision, mission, and goals.	Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements: • Establishes a two-way communication process for families that provides information about student progress and learning. • Supports family and community partnerships that are visible and sustainable. • Assesses potential community partners and secures additional resources that support the district. • Highlights the usage of resources and shares district accomplishments by regularly communicating with community partners.

COMMUNITY RELATIONSHIPS

CATEGORIES	*SELF SCORE*	*SUPPORTING ACTIVITIES*

Identifies multiple points of view for problem solving situations and involves stakeholders in decisions affecting the district.	4	• Coffee Chats
		• Advisories
		  ◦ Student Leadership Council
		  ◦ Principal Advisory Council
		  ◦ Teacher Cabinet
		• Community Engagement
		  ◦ Community Newsletters
		  ◦ Monthly Family Pulse Checks
		  ◦ School Newsletters
		  ◦ Community Budget Meetings
		  ◦ Back to School Bash
		  ◦ Better Together Volunteer Events
		• Family Connection Center
		• Let's Talk, HCS! Podcast
		• Bi-monthly meetings with key community partners
		• Hamilton County-Chattanooga Children's Cabinet

Strategically utilizes community resources and established partnerships to support the Board's vision, mission, and goals.	5	• Future Ready partnerships
		• Tutoring Partners
		  ◦ Americorp
		  ◦ Literacy First
		  ◦ Ignite Tutors
		• Out of School Time Alliance
		• Early Learning Alliance
		• Future Fund
		• Homeless Pilot
		• Community Forward Partners
		• Children's Cabinet
		• Leadership Hamilton County Schools
		• $60 million in deferred maintenance bond
		• $260 million capital improvement bond
		• YMCA school partnership

Total Score: 9/10– **Overall Rating: 4.5**

BUSINESS AND FINANCE

OVERVIEW OF SELF SCORE

What does the evidence say?

I've led with strong financial practices that reflect transparency, alignment, and accountability. Our annual audit reports and internal statements confirm compliance with Board policy, state, and federal guidelines. I've ensured staff receive timely, clear communication about budgeting, and have provided tools to support consistent financial practices at the school level. The continued use of priority based budgeting ensures that resources are used strategically to support student success and stay aligned to our strategic plan. The FY26 budget process, while difficult, was led with transparency for the community with multiple opportunities for feedback and input.

Opportunities and Next Steps

My next step is to continue simplifying how we present the district's complex budget to the broader community. With multiple revenue streams and spending categories, I want to make financial information easier to understand. Clearer communication will increase community trust and ensure all stakeholders can see how we are aligning our resources to our priorities.

RUBRIC

LEVEL 1 - SIGNIFICANTLY BELOW EXPECTATIONS	*LEVEL 2 - BELOW EXPECTATIONS*	*LEVEL 3 - AT EXPECTATIONS*	*LEVEL 4 - ABOVE EXPECTATIONS*	*LEVEL 5 - SIGNIFICANTLY ABOVE EXPECTATIONS*
Rarely or never establishes, communicates, and enforces administrative procedures by: • Aligning them with Board policy, state law, and federal requirements. • Communicating established administrative procedures. • Ensuring administrators are accountable to the administrative procedures. Rarely or never performs all budgetary responsibilities by: • Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	Exceeds Level 1 rubric but does not meet Level 3 rubric.	Establishes, communicates, and enforces administrative procedures by: • Aligning them with Board policy, state law, and federal requirements. • Communicating established administrative procedures. • Ensuring administrators are accountable to the administrative procedures. Performs timely, accurate, and transparent budgetary responsibilities by: • Allocating resources in alignment with district priorities to increase student achievement. • Ensuring that delegated budgetary responsibilities are performed within all appropriate district, state, and federal guidelines.	Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors: • Leads administrators and staff in frequent reviews of administrative procedures to vet effectiveness and ensure the effective and efficient operation of the school district. • Leads administrators in frequent reviews of fiscal resource allocation to support the effective and efficient operation of the district.

BUSINESS AND FINANCE

CATEGORIES	*SELF SCORE*	*SUPPORTING ACTIVITIES*

Budget will be presented on time and in a transparent manner to both the board and community.	4	• Budget Draft Submissions
		  ◦ V1 - 4-10-2025
		  ◦ V2 - 4-30-2025
		  ◦ V3 - 5-8-2025
		• Budget Narrative
		• Budget Memos
		• Comprehensive Staff Communication

Steps will be articulated and implemented to ensure school leaders are resourced to address the unique needs of every school.	5	• Staffing model worksheets • Staffing model business rules ◦ Strategic staffing dollars • Title 1 funding spiral • Federal Programs budgeting • School Funds
Demonstrates budget management, including financial forecasting, planning, cash flow management, account auditing, and monitoring, and oversees the district's fiduciary responsibilities.	4	• Annual Comprehensive Financial Reports • Grants Management and Monitoring • School Accounting Handbook • Fixed Asset Inventory Management • Annual Procurement Rules Handbook • Risk Management Procedures

Provides accurate and timely reports to the Board on the financial condition of the school system.	4	• Monthly Board financial updates
		  ◦ Bids and Contracts
		  ◦ Financial Reports
		  ◦ Budget Amendments

Meets and works collaboratively with the Board and appropriate staff to determine budget priorities, including alignment with strategy and the effective allocation of resources.	4	• Board Finance Committee meetings • Individual meetings with Board Chair, Vice Chair, and Finance

Total Score: 21/25 – **Overall Rating: 4.2**

BOARD RELATIONSHIP

OVERVIEW OF SELF SCORE

What does the evidence say?

I've worked to maintain a consistent, transparent, and engaged relationship with the Board. Weekly Board memos keep members informed of key operational updates aligned to Opportunity 2030. I also make time to directly inform each Board member of events in their respective districts. I actively support and participate in Board retreats and TSBA convenings to promote shared professional learning and strong governance alignment. These practices show high engagement and alignment with the Board's vision and expectations.

Opportunities and Next Steps

Moving forward, I plan to create more structured ways to seek and apply Board feedback in decision-making. In addition to regular updates and professional collaboration, finding additional entry points for feedback will help strengthen trust, reinforce growth, and support the Board's role in shaping district direction.

RUBRIC

LEVEL 1 - SIGNIFICANTLY BELOW EXPECTATIONS	*LEVEL 2 - BELOW EXPECTATIONS*	*LEVEL 3 - AT EXPECTATIONS*	*LEVEL 4 - ABOVE EXPECTATIONS*	*LEVEL 5 - SIGNIFICANTLY ABOVE EXPECTATIONS*

• Inconsistently uses feedback from the Board to improve and demonstrates little evidence of growth.
• Unprepared or disengaged with the Board and professional learning opportunities.
• Engages in the evaluation process without evidence of focus on continuous improvement.
• Self-reflections do not match the expectations of the Board of the director's evaluation instrument.
• Inconsistently contributes to school district growth by failing to assist and mentor administrators.
	Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from the Board to implement personal and professional improvement strategies.
		• Prepared and engaged with the Board and professional learning opportunities.
		• Engages in the evaluation process with evidence of focus on improvement.
		• Contributes to the school district by assisting others, including at least two of the following.
		  ◦ Collaborative planning with administrators and staff to execute Board policies and decisions.
		  ◦ Actively participating in professional learning.
		  ◦ Building capacity for aspiring administrators.
			Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Uses feedback from the Board to significantly improve performance.
				• Consistently prepared and highly engaged with the Board and in professional learning opportunities.
				• Engages in the evaluation process and seeks out feedback, matching the expectations of the Board and the director's evaluation instrument.
				• Actively and consistently contributes to the school district by assisting and/or mentoring others, including:
				  ◦ Collaborative planning with administrators and staff to execute Board policies and decisions. Actively leading professional learning.
				  ◦ Leading data-driven professional learning opportunities.
				  ◦ Building capacity for aspiring administrators.

BOARD RELATIONSHIP

CATEGORIES	*SELF SCORE*	*SUPPORTING ACTIVITIES*
Keeps board members informed on issues, needs, and operation of the school system.	4	• Weekly Board Updates newsletter • Topic specific memos • Calls and meets with individual board members
Follows through on initiatives and strategies communicated to the Board of Education.	5	• Strategic Project Oversight updates • Board memos • Opportunity 2030 Board Updates • Board requests
Seeks and accepts constructive criticism of work from the Board.	3	• Individual Board member meetings • Tailored communication practices for each Board member
Interprets and executes the intent of Board policy through the development of administrative procedures.	3	• Cell phone policy implementation procedures • School Procedures Handbook • Mental Health RFP
Maintains/improves relations with the Board by consistent and appropriate interpersonal/professional interactions while making appropriate recommendations based on thorough analysis and study.	4	• Availability for calls, and meetings as needed for each Board member. • Offers advice and expert recommendations when requested at Board meetings and in individual conversations. • Defers to expertise in the field and in the community and connects Board members to external expertise as requested. • Participates in multiple professional learning opportunities with Board members ◦ Tennessee School Board Association (TSBA) meetings, Board retreats, and support of national training opportunities.

Total Score: 19/25– **Overall Rating: 3.8**

STAFF AND PERSONNEL RELATIONSHIP

OVERVIEW OF SELF SCORE

What does the evidence say?

I have built strong systems for supporting and engaging staff across the district. Our induction program and New Teacher Coach resources provide consistent, embedded support for new educators. Results from the second year of our Gallup engagement survey show an increase in employee engagement. Through The Pulse newsletter and pulse check feedback, I've shared timely updates and responded to staff needs to strengthen transparency and trust across the organization. Coffee Chats started last year as an opportunity to gain more informal input/feedback from staff, and this year I held two Ask Me Anything sessions at the PLC.

Opportunities and Next Steps

Going forward, I plan to focus more deeply on the areas identified in the engagement survey —particularly where staff need more support or clearer alignment to the mission. By refining our approach, I hope to continue building a culture that retains high-performing educators and fosters leadership development at every level.

RUBRIC

LEVEL 1 - SIGNIFICANTLY BELOW EXPECTATIONS	*LEVEL 2 - BELOW EXPECTATIONS*	*LEVEL 3 - AT EXPECTATIONS*	*LEVEL 4 - ABOVE EXPECTATIONS*	*LEVEL 5 - SIGNIFICANTLY ABOVE EXPECTATIONS*

• Rarely or never indicts, supports, retains, and grows administrators by designing and implementing an induction program for new administrators and staff.
• Rarely or never develops strategies for:
  ◦ Retaining high-performing educators and administrators.
  ◦ Fostering leadership skills in the most effective educators and administrators based on student outcomes.
• Utilizing a variety of methods to support the development of administrators.
	Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Designs and implements an induction program for new administrators and staff.
		• Develops strategies for:
		  ◦ Retaining high-performing educators.
		  ◦ Fostering leadership skills in the most effective educators and administrators based on student outcomes.
		• Utilizing a variety of methods to support the development of all administrators and staff.
			Exceeds Level 3 rubric but does not meet Level 5 rubric.	Engages with the district leadership team to:
				• Design and implement an induction program for new educators.
				• Develop strategies for retaining high-performing educators.
				• Develop strategies for fostering leadership skills in the most effective educators and administrators based on student outcomes.
				• Supports the development of all administrators utilizing a variety of methods.

STAFF AND PERSONNEL RELATIONSHIP

CATEGORIES	*SELF SCORE*	*SUPPORTING ACTIVITIES*
95% of certified positions will be staffed by the 10th day of each year.	5	• 98.8% of certified positions
90% of new teachers will be retained each year.	3	• 1st-3rd Year Teachers - 89.7% retained ◦ 1st year - 91.2% ◦ 2nd year - 93.9% ◦ 3rd year - 81.4%
Employee retention rates will exceed 85% each school year.	5	• 89% of all employees retained
Collaborates with administrators to induct, support, retain, and grow effective educators based on evidence of student outcomes.	4	• LEAD Programs • Talent Development Trainings • T-Eval for performance management of all employees
Develops appropriate structures to address staff morale based on district analysis.	4	• Gallup survey • School plans based on survey results • Just Cause Awards • Annual Chili Cook-Off
Provides shared leadership and decision-making opportunities for staff that promotes a climate of collaboration and collegiality.	4	• Principal Advisory Commitee • HCEA Collaboration • Principal Association Collaboration • All Hands Meetings
Identifies and applies appropriate policies, criteria and processes for the recruitment, selection, induction, compensation, and separation of personnel.	4	• Differentiated Compensation • Talent Toolkit for Administrators (recruitment and selection)
Evaluates the organizational structure of the district and reorganizes as necessary to achieve maximum effectiveness.	4	• Updated 2025 Organizational Structure • Evaluate each vacant central office position for effectiveness and need before posting

Total Score: 32/40 – **Overall Rating: 4.1**

INTEGRITY, FAIRNESS, AND ETHICS

OVERVIEW OF SELF SCORE

What does the evidence say?

I've established systems that embed our district's values while creating space for shared decision-making. Pulse check surveys provide timely insights that inform operational and strategic decisions. I use advisory councils and stakeholder cabinets to ensure community voices shape our direction. I also reinforce our shared beliefs and commitments through a common slide deck template used across all district events, supporting consistent messaging and expectations.

Opportunities and Next Steps

I plan to continue building the capacity of leaders to engage their own school communities in shared decision-making and reflection. Strengthening feedback structures at all levels and modeling high expectations for outcomes and engagement will reinforce a districtwide culture of trust, clarity, and commitment to student success.

RUBRIC

LEVEL 1 - SIGNIFICANTLY BELOW EXPECTATIONS	*LEVEL 2 - BELOW EXPECTATIONS*	*LEVEL 3 - AT EXPECTATIONS*	*LEVEL 4 - ABOVE EXPECTATIONS*	*LEVEL 5 - SIGNIFICANTLY ABOVE EXPECTATIONS*
• Does not engage or limit engagement of stakeholder groups and does not seek input or feedback on district improvement. • Does not communicate expected values and beliefs to all staff. • Does not design or implement structures that increase shared ownership in district success. • Fails to establish high expectations for administrators' individual responsibility for district success.	Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Develops structures to encourage all stakeholders to provide input and feedback in district improvement decisions. • Communicates basic values and beliefs to all staff. • Models a commitment to the possibility of success for all students. • Designs and/or implements structures to increase shared ownership in district success. • Clearly and consistently communicates high expectations for administrators' individual responsibility for district success.	Exceeds Level 3 rubric but does not meet Level 5 rubric.	• Develops the capacity of administrators to implement structures for engaging all stakeholders to provide input and feedback in district improvement decisions. • Clearly communicates basic values and beliefs to all staff. • Enacts procedures that reflect a district-wide commitment to student success. • Clearly and consistently communicate administrators' individual responsibility for district success. • Establishes a culture where all administrators address low expectations about student potential.

INTEGRITY, FAIRNESS, AND ETHICS

CATEGORIES	*SELF SCORE*	*SUPPORTING ACTIVITIES*
Includes a varied set of administrators, educators, and stakeholders in district and school improvement decisions.	4	• District and Learning Community Advisory Councils • Principal Advisory Council • Teacher's Cabinet • Student Leadership Council • Coffee Chats
Models and communicates expectations for individual and shared ownership of student, educator, school, and district success.	4	• Strategic Project Oversight - accountability management • Meeting agendas and Clear Next Steps • Shared values of excellence and accountability
Expects and emphasizes that all staff demonstrate integrity and exercise ethical behavior throughout the district.	4	• Lead with organizational values • Hold high expectations through HR processes
Treats people fairly, equally, and with dignity and respect.	5	• HR procedures and guidelines • Appropriate documentation • Professional communication practices

Total Score: 17/20 – **Overall Rating: 4.3**

FACILITIES AND SAFETY

OVERVIEW OF SELF SCORE

What does the evidence say?

I've worked closely with the community to listen, gather input, and create a Board-approved priority list for facilities improvements. This list now drives operational decisions and the strategic use of bond funds. I've aggressively utilized the deferred maintenance bond to make critical upgrades that improve learning environments across schools. I've also worked to define safety as more than building security, emphasizing school culture as a key component of a safe learning environment. A decrease in repeat discipline infractions shows that our work is making a meaningful impact on both physical safety and school climate.

Opportunities and Next Steps

My next step is to continue supporting school leaders in setting expectations for safe, supportive learning environments aligned with the district's vision. This includes regular review of behavioral and facilities data to assess progress and guide adjustments. Sustaining this focus will ensure that improvements in both infrastructure and school culture continue to support strong outcomes for students. We will continue to refine our safety protocols at public events and differentiate our approach as needed.

RUBRIC

LEVEL 1 - SIGNIFICANTLY BELOW EXPECTATIONS	*LEVEL 2 - BELOW EXPECTATIONS*	*LEVEL 3 - AT EXPECTATIONS*	*LEVEL 4 - ABOVE EXPECTATIONS*	*LEVEL 5 - SIGNIFICANTLY ABOVE EXPECTATIONS*

• Expectations for resource allocation are not clearly aligned wit the school district vision, mission, and goals.
• District policies are not:
  ◦ Clearly communicated.
  ◦ Implemented consistently and fairly.
  ◦ Related to students' safety.
• Inadequate support for administrators to:
  ◦ Analyze behavioral data to assess intervention and discipline effectiveness.
• Use of data to adjust routines to maximize learning and decrease distractions.
	Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Expectations for resource allocation are aligned with the school district's vision, mission, and goals.
		• District polices are:
		  ◦ Clearly communicated
		  ◦ Implemented consistently and fairly
		  ◦ Related to students' safety
		• Establishes practices that support:
		  ◦ Analyzing behavioral data to assess interventions and discipline.
		  ◦ Use of data to adjust routines to maximize learning and decrease distractions.
		• Sufficient evidence that ensures administrators are adhering to expectations established in Board policy.
			Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 requirements, ensure administrators:
				• Help set expectations for the learning environment and facilities that aligned with the school district's vision, mission, and goals.
				• Review behavioral and discipline data to assess the effectiveness of interventions, adjusting when needed to ensure a safe learning environment.

FACILITIES AND SAFETY

CATEGORIES	*SELF SCORE*	*SUPPORTING ACTIVITIES*
Fosters a safe, respectful, and orderly learning environment for all.	4	• Repeat discipline infraction data decreases • RTI2B recognized schools • Code of Acceptable Behavior
Demonstrates knowledge of school facilities and develops a process that builds public support for facility needs, including capital improvements.	5	• School Facilities podcast episode • Submission of all applicable board documents and approvals • Initiate CMAR process for more efficient building processes • Board approval of community facilities bond list
Ensures the maintenance of school property and the safety of personnel and property.	3	• Approved spending from $60MM deferred maintenance bond • Summer maintenance schedule • Partnership with local law enforcement agencies • School emergency response plans

Total Score: 12/15 – **Overall Rating: 4.0**

DISTRICT MANAGEMENT

OVERVIEW OF SELF SCORE

What does the evidence say?

I have taken a reflective and transparent approach to leadership, aligning my work with the Board's vision and mission. I've created structured feedback loops with key stakeholders that inform decisions at the highest level. Each year, I engage in professional learning through TDOE and TOSS designed specifically for Tennessee superintendents, helping me stay aligned with statewide expectations and best practices. Through the State of the System address, I publicly connect my leadership to district outcomes, helping our community see how our values and direction are producing results.

Opportunities and Next Steps

This year, I plan to expand the reach of our existing feedback structures by forming additional advisory councils. Expanding stakeholder voice will strengthen my reflection, improve alignment, and ensure that my leadership remains grounded in the lived experiences of our stakeholders to further strengthen our alignment with districtwide goals.

RUBRIC

LEVEL 1 - SIGNIFICANTLY BELOW EXPECTATIONS	*LEVEL 2 - BELOW EXPECTATIONS*	*LEVEL 3 - AT EXPECTATIONS*	*LEVEL 4 - ABOVE EXPECTATIONS*	*LEVEL 5 - SIGNIFICANTLY ABOVE EXPECTATIONS*

Rarely or never improves self-practice by:
• Using feedback from sources to reflect on personal leadership practices, and does not make any necessary changes for improvement.
• Engaging in professional learning:
  ◦ Aligned to student, educator, and self-need.
  ◦ Focused on developing an understanding of performance expectations associated with state standards.
• Implementing new, relevant learning from feedback and professional learning opportunities.
	Exceeds Level 1 rubric but does not meet Level 3 rubric.	• Uses feedback from a variety of sources to reflect on personal leadership practices and make any necessary changes for improvement.
		• Engages in professional learning aligned to student, educator, and self-need.
		• Develops an understanding of performance expectations associated with Tennessee Instructional Leader Standards.
		• Implements new, relevant learning from feedback and professional learning opportunities with evidence of improvement.
			Exceeds Level 3 rubric but does not meet Level 5 rubric.	In addition to Level 3 descriptors:
				• Actively seeks feedback from a variety of sources to reflect on personal leadership practices and make any necessary changes for improvement.
				• Connects personal leadership practices to student achievement and administrator and educator performance by sharing his/her performance evaluation results with district staff.
				• Reflects on leadership alignment with core value and the Board's vision, mission, and goals.

DISTRICT MANAGEMENT

CATEGORIES	*SELF SCORE*	*SUPPORTING ACTIVITIES*
Ensures operational plans and procedures to achieve the vision, mission, and goals that are in place.	4	• Emergency Operations Plan updated annually, clear process in place for emergency response (such as severe weather, fire, intruders, and weapons) in partnership with local law enforcement, first responders, and the Office of Emergency Management • Employee Hub provides staff with information on finance and procurement rules, IT systems, and HR practices • Implemented Learning & Leading and Business, Operations, & Talent Cabinets to encourage the development of cross-district standard operating procedures
Identifies, confronts, and resolves problems in a timely manner.	4	• Immediately responds to Board Member text updates if a problem is identified • Reviews QuickTip Alerts • Mental Health RFP
Recognizes, studies, and applies emerging trends as appropriate.	4	• Active in Professional Learning through Tennessee Organization of School Superintendents (TOSS) • Consistently connects with regional superintendents and like-district superintendents across the state • Stays informed via newsletters from TDOE and SCORE • Managed district-led efforts related to cybersecurity, benefits management, curriculum adoption, and student safety
Use effective communication skills.	4	• Utilizes multiple forms of communication for all staff types, including office and cell phone calls, emails, and text messages • Responds to emails clearly and concisely in a timely fashion • Annual State of the System to clearly communicate direction of the district for the upcoming year
Guides and directs upper-level district management in the performance of their job duties, accepts constructive criticism from the Board regarding the same, and takes responsibility where appropriate.	4	• Senior Leadership Team meetings and All Hands Management meetings on a consistent cadence • 1-on-1 meetings with upper-level district leaders and provides direct reports with annual evaluations • Annually incorporates Board evaluation feedback

Total Score: 21/25 – **Overall Rating: 4.0**

HAMILTON COUNTY SCHOOLS

3074 Claude Ramsey Parkway
Chattanooga, TN 37421

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

From: Mary Ellen Heuton, Chief Financial Officer
Lindsay Cepero, Director of Procurement

Date: January 15, 2026

Subject: November 2025 Legal Services Summary

Board Agenda Category:

- ☐ Consent Agenda
- ☐ Action Item
- ☑ Reports and Information

The following reflects the legal fees paid for services received during the month of November 2025. Amount paid includes retainer and allowable pass-through court expenses.

Bennett & DeCamp, PLLC

Retainer	$20,000.00
Court Fees	$2,883.36
TOTAL	**$22,883.36**

Opportunity 2030 Commitment Connection

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