

Owasso Board of Education Regular Meeting  
Monday, May 11, 2026 5:30 PM Central

Board of Education Conference Room of the Dale C. Johnson Education Service Center  
1501 N Ash St.  
Owasso, Oklahoma 74055

- I. **Call to Order and Roll Call**  
Attendance Taken at 5:30 PM.  
Brent England: Present  
Neal Kessler: Present  
Rhonda Mills: Present  
Stephanie Ruttman: Present  
Forrest Turpen: Present  
Present: 5.
- II. **Special Recognition/Pledge of Allegiance** - Ms. Katharine Giffhorn and Jaedn Cook
- III. **Special Recognition** - Ms. Marianne Zamor and Mr. Richard Zamor, Odyssey of the Mind - Odyssey Angel Award Recipients
- IV. **Special Recognition** - Dr. Chris Barber, OK Arts Excellence Award Recognition
- V. **Reports to the Board**
  - A. Superintendent - Dr. Margaret Coates Dr. Coates shared information regarding the current legislative session and a few bills that have been passed that will affect student and staff in the district. She highlighted a few end of the year events taking place such as Senior Walk, Teacher Appreciation Week, and Kindergarten Kick Start.
  - B. Teaching and Learning - Mr. Mark Officer Mr. Officer shared logistical details regarding Graduation. He reported that Special Olympics will take place May 13–15 in Stillwater and 12 students were selected for the Oklahoma Arts Institute at Quartz Mountain.
  - C. District Services - Mr. Kerwin Koerner Mr. Koerner reported that the bus lot survived the recent hail storm with no damage. The Bailey elementary loop road is now open and is eliminating traffic concerns in that area. He shared his teams are gearing up for summer projects.
  - D. Continuous Strategic Improvement (CSI) - Goal Area #2 Ram Team - Phillip Storm
- VI. **Comments from the Public Regarding Agenda Items**  
Each individual will have five (5) minutes to share their remarks related to the specific agenda item identified by the individual when signing up to speak. Board members will not respond to public comment or answer questions posed during public comment. The total time allotted to comments from the public regarding the agenda will not exceed fifteen (15) minutes. There were no comments from the public regarding agenda items.
- VII. **Consent Agenda:** Board to consider and take possible action on the following consent agenda items. (Dr. Coates)

Motion to approve Consent Agenda items. This motion, made by Neal Kessler and seconded by Forrest Turpen, passed.

Brent England: Yea  
Neal Kessler: Yea  
Rhonda Mills: Yea  
Stephanie Ruttman: Yea  
Forrest Turpen: Yea

Yea: 5, Nay: 0

A. Minutes of Regular Meeting April 13, 2026

B. Minutes of Special Meeting April 24, 2026

C. Teaching and Learning

- i. Out of State Student Activity Trips
- ii. Memorandum of Understanding (MOU) with Southwestern Oklahoma State University for on-site school psychology experiences to candidates who are enrolled in the Educational Specialist Degree Program in School Psychology for the 2026-2027 school year at a cost of \$-0-, as outlined in the attachment and authorize the Superintendent or designee to execute the MOU
- iii. Agreement with Connected Kids Inc. for trauma-responsive onsite coaching and consulting for nine elementaries for the 2026-2027 school year at a cost of \$18,600.00, as outlined in the attachment and authorize the Superintendent or designee to Agreement
- iv. License subscription quote with BrainPop for full access to supplemental digital curriculum modules for elementary students at our 9 elementary schools and the 6th Grade Center for the 2026-2027 school year at a cost of \$42,332.20, as outlined in the attachment and authorize the Superintendent or designee to execute the agreement
- v. Contracts with Cherokee Nation for the SPARK program to be a contracted provider at 9 elementary sites and the 6th Grade Center for the 2026- 2027 school year at a cost of \$-0-, as outlined in the attachment
- vi. Quote with Really Great Reading for professional development packages for the 2026-2027 school year at a cost of \$8,500.00, as outlined in the attachment and authorize the Superintendent or designee to execute the quote
- vii. Purchase Agreement with Solution Tree for PLC at Work professional development for the 2026-2027 school year at a cost of \$17,000.00, as outlined in the attachment and authorize the Superintendent or designee to execute the Purchase Agreement
- viii. Purchase Agreement with Solution Tree for All Means All professional development for the 2026–2027 school year at a cost of \$17,000.00, as outlined in the attachment and authorize the Superintendent or designee to execute the Purchase Agreement
- ix. Agreement with Literacy Resources LLC dba Heggerty for Phonemic Awareness Professional Development for the 2026-2027 school year at a

cost of \$5,000.00, as outlined in the attachment and authorize the Superintendent or designee to execute the Agreement

- x. Contract with Superior Vision Consulting for the 2026-2027 school year at a cost outlined in the attachment and authorize the Superintendent or designee to execute the Contract
  - xi. Memorandum of Understanding (MOU) with Goodwill Industries of Tulsa, Inc. for providing Work Adjustment Training classes for the 2026-2027 school year at no cost, as outlined in the attachment and authorize the Superintendent or designee to execute the MOU
  - xii. Agreement with State of Oklahoma, Department of Rehabilitation Services, Transition School-To-Work: Work Study for the 2026-2027 school year at no cost to the District, as outlined in the attachment and authorize the Superintendent or designee to execute the Agreement
  - xiii. Contract with Sebastian Lantos, LLC to provide Interpreting and Translating Services for the 2026-2027 school year at a cost outlined in the attachment and authorize the Superintendent or designee to execute the Contract
  - xiv. Memorandum of Understanding (MOU) with Grand Mental Health to provide group and individual counseling and other services for the 2026-2027 school year at no cost to the District and authorizes the Superintendent or designee to execute the MOU
  - xv. Contract with Mobilized Vision, LLC for orientation and mobility services for the 2026-2027 school year at a cost outlined in the attachment and authorize the Superintendent or designee to execute the Contract
  - xvi. Contract with Shelby Stavely Caruso for Speech Language Pathology Services for the 2026 - 2027 school year at a cost as outlined in the attachment and authorize the Superintendent or designee to execute the Contract
  - xvii. License agreement with Acellus Educational Services for monthly student licenses for the 2026- 2027 school year at a cost of \$30,020.00 as outlined in the attachment and authorize the Superintendent or designee to execute the license agreement
- D. District Services
- i. Memorandum of Understanding (MOU) with Owasso Police Department for School Resource Officers for the 2026-27 school year at a cost of \$160,000, as outlined in the attachment and authorizing the Superintendent or designee to execute the MOU
  - ii. Memorandum of Understanding (MOU) with Owasso Police Department for K-9 Narcotics Control for the 2026-2027 school year at a cost of \$10,000, as outlined in the attachment and authorizing the Superintendent or designee to execute the MOU
  - iii. Service Agreement with Commercial Power Solutions for scheduled maintenance inspections for the 2026-2027 school year at a cost of \$990.00 per year as outlined in the attachment, and authorize the Superintendent or designee to execute the Contract

- iv. Service agreement with American Waste Control for trash removal services for the 2026-2027 school year at a cost of \$5,201.45 per month as outlined in the attachment, and authorize the Superintendent or designee to execute the Contract
  - v. Contract with Lopez Lawn Care for lawn services and landscaping for the 2026-27 school year at a cost of \$165,600.00, as outlined in the attachment and authorize the Superintendent or designee to execute the Contract
  - vi. Agreement with Imperial for vending services for the 2026-2027 school year as outlined in the attachment and authorize the Superintendent or designee to execute the Agreement
  - vii. Contract with ECT for district-wide Heating, Ventilation and Air Conditioning Service for the 2026-2027 school year at a cost of \$594,999.96, as outlined in the attachment and authorize the Superintendent or designee to execute the Contract
- E. Technology
- i. Contract with Active Internet Technologies for Finalsite website hosting services for the 2026-2027 school year at a cost of \$18,500, as outlined in the attachment and authorize the Superintendent or designee to execute the contract
  - ii. Contract with Active Internet Technologies for Messages XRE mass messaging services for the 2026-2027 school year at a cost of \$18,500, as outlined in the attachment and authorize the Superintendent or designee to execute the contract
  - iii. Quote from United Systems for renewal of support of DELL PowerEdge R440 (5/22/26-6/30/27) and R240 (4/7/26-6/30/27) at a cost of \$1,912.76, as outlined in the attachment and authorize the Superintendent or designee to execute the agreement
  - iv. Quote from United Systems for renewal of IDPA support for the 2026-2027 school year at a cost of \$19,382.90 as outlined in the attachment and authorize the Superintendent or designee to execute the agreement
  - v. Quote from United Systems for renewal of Dell PowerProtect 6900 & DS60, Dell Cyber Data Protect, Dell S4112T Switch (CyberVault) support for the 2026-2027 school year at a cost of \$36,128.84 as outlined in the attachment and authorize the Superintendent or designee to execute the agreement
- F. Finance
- i. Purchase orders (encumbrances) and changes to encumbrances for April 2026
    - 2025-2026 General Fund #1696-1724 (Vendors) \$24,009.74
    - 2025-2026 General Fund Net Change Orders \$500.00
    - 2025-2026 Building Fund #96 (Vendors) \$894.67
    - 2025-2026 Child Nutrition Fund #50 (Vendors) \$295.00
    - 2025-2026 Bond Fund 31 #417-420 (Vendors) \$36,246.45
    - 2025-2026 Bond Fund 32 #5 (Vendors) \$61,000.00
    - 2025-2026 Bond Fund 04-BOK #27-32 (Vendors) \$2,000,344.00
  - ii. Activity Financial Report for April 2026

- iii. Concession Contracts with Owasso Boosters for the rights to operate the Concession stand for the 2026-2027 school year at a cost of 10% of the Club's concession profits, as outlined in the attachment and authorize the Superintendent or designee to execute the Concession Contract
- iv. Agreement with The Cooperative Council for Oklahoma School Administration (CCOSA) for District Level Services for the 2026–2027 school year at a cost of \$2,500.00, as outlined in the attachment and authorize the Superintendent or designee to execute the agreement
- v. Annual Membership Dues for Oklahoma State School Board Association for the 2026-2027 school year at a cost of \$5,796.00, as outlined in the attachment and authorize the Superintendent or designee to execute the agreement
- vi. Annual renewal with Oklahoma State School Board Association for Policy Services Subscription for the 2026-2027 school year at at cost of \$1,500.00, as outlined in the attachment and authorize the Superintendent to execute the agreement
- vii. Annual Subscription Renewal with Oklahoma State School Board Association for Assemble Meetings for the 2026-2027 school year at a cost of \$3,000.00, as outlined in the attachment and authorize the Superintendent or designee to execute the agreement
- viii. Agreement with Sylogist Ed for accounting software for the period July1, 2026 to June 20, 2027 at a cost of \$49,520.10 as outlined in the attachment and authorize the Superintendent or designee to execute the agreement
- ix. Agreement with Frontline Education for Time and Attendance, Applicant Tracking, and Employee Evaluation software for the period July1, 2026 to June 20, 2027, at a cost of \$81,552.81 as outlined in the attachment and authorize the Superintendent or designee to execute the agreement

G. Human Resources  
 i. Transitions

VIII. **Communications/Superintendent** - Dr. Margaret Coates

A. Board to consider and take possible action on the 2027-2028 School Calendar (Jordan Korphage)

Motion to approve the 2027-2028 School Calendar. This motion, made by Stephanie Ruttman and seconded by Neal Kessler, passed.

- Brent England: Yea
  - Neal Kessler: Yea
  - Rhonda Mills: Yea
  - Stephanie Ruttman: Yea
  - Forrest Turpen: Yea
- Yea: 5, Nay: 0

IX. **Teaching and Learning** - Mark Officer

A. Board to consider and take possible action on the Contract with Jessica Minahan, LLC for Professional Development on the topic of children with anxiety-related and challenging behavior for the 2026-2027 school year at a

cost of \$6,500.00, as outlined in the attachment and authorize the Superintendent or designee to execute the Contract  
Motion to approve the Contract with Jessica Minahan, LLC for Professional Development on the topic of children with anxiety-related and challenging behavior for the 2026-2027 school year at a cost of \$6,500.00, as outlined in the attachment and authorize the Superintendent or designee to execute the Contract. This motion, made by Neal Kessler and seconded by Brent England, passed.

Brent England: Yea  
Neal Kessler: Yea  
Rhonda Mills: Yea  
Stephanie Ruttman: Yea  
Forrest Turpen: Yea  
Yea: 5, Nay: 0

B. Report to the Board regarding the key provisions of the recently passed Strong Readers Act, SB 1778. (Ashley Hearn)

X. **District Services** - Kerwin Koerner

A. Board to Consider and Take Possible Action on Proposed Child Nutrition Salary Schedules for the 2026-2027 Fiscal Year

Motion to approve the proposed Child Nutrition Salary Schedules for the 2026-2027 Fiscal Year. This motion, made by Stephanie Ruttman and seconded by Brent England, passed.

Brent England: Yea  
Neal Kessler: Yea  
Rhonda Mills: Yea  
Stephanie Ruttman: Yea  
Forrest Turpen: Yea  
Yea: 5, Nay: 0

XI. **Technology** - Dr. Michelle Baker

A. Board to consider and take possible action on the Standard Student Data Privacy Agreement with Edmentum, Inc. to add Owasso Public Schools as a subscriber to an existing agreement between Enid Public Schools and Edmentum, Inc. at a cost of \$-0-, as outlined in the attachment and authorize the Superintendent or designee to execute the agreement

Motion to approve the Standard Student Data Privacy Agreement with Edmentum, Inc. to add Owasso Public Schools as a subscriber to an existing agreement between Enid Public Schools and Edmentum, Inc. at a cost of \$-0-, as outlined in the attachment and authorize the Superintendent or designee to execute the agreement. This motion, made by Stephanie Ruttman and seconded by Forrest Turpen, passed.

Brent England: Yea  
Neal Kessler: Yea  
Rhonda Mills: Yea

Stephanie Ruttman: Yea

Forrest Turpen: Yea

Yea: 5, Nay: 0

**XII. Finance - Phillip Storm**

- A. Board to consider and take possible action on the Treasurer's Report for April 2026

Motion to approve the Treasurer's report for April 2026. This motion, made by Neal Kessler and seconded by Stephanie Ruttman, passed.

Brent England: Yea

Neal Kessler: Yea

Rhonda Mills: Yea

Stephanie Ruttman: Yea

Forrest Turpen: Yea

Yea: 5, Nay: 0

- B. Board to consider and take possible action on an updated Resolution and Administrative Services Agreement with Pension Solutions for District 457 Deferred Compensation Plan

Motion to approve the updated Resolution and Administrative Services Agreement with Pension Solutions For District 457 Deferred Compensation Plan. This motion, made by Neal Kessler and seconded by Stephanie Ruttman, passed.

Brent England: Yea

Neal Kessler: Yea

Rhonda Mills: Yea

Stephanie Ruttman: Yea

Forrest Turpen: Yea

Yea: 5, Nay: 0

- C. Board to consider and take possible action on an updated Resolution and Administrative Services Agreement with Pension Solutions for District 403b Plan

Motion to approve the updated Resolution and Administrative Services Agreement with Pension Solutions For District 403b Plan. This motion, made by Stephanie Ruttman and seconded by Brent England, passed.

Brent England: Yea

Neal Kessler: Yea

Rhonda Mills: Yea

Stephanie Ruttman: Yea

Forrest Turpen: Yea

Yea: 5, Nay: 0

**XIII. New Business** There was no New Business.

**XIV. Vote to Adjourn**

Motion to adjourn at 6:24 p.m. This motion, made by Stephanie Ruttman and seconded by Neal Kessler, passed.

Brent England: Yea

Neal Kessler: Yea

Rhonda Mills: Yea

Stephanie Ruttman: Yea

Forrest Turpen: Yea

Yea: 5, Nay: 0

Owasso Board of Education Regular Meeting  
Monday, April 13, 2026 6:30 PM Central

Board of Education Conference Room of the Dale C. Johnson Education Service Center  
1501 N Ash St.  
Owasso, Oklahoma 74055

**I. Call to Order and Roll Call**

Attendance Taken at 6:30 PM.

Brent England: Absent  
Neal Kessler: Present  
Rhonda Mills: Present  
Stephanie Ruttman: Present  
Forrest Turpen: Absent

Present: 3, Absent: 2.

II. Discussion and possible action to reorganize the officers of the board of education in accordance with 70 O.S. Section 5-119

Motion to reorganize the officers of the board of education as follows: President: Rhonda Mills, Vice President: Neal Kessler, Clerk: Brent England, Members: Frosty Turpen and Stephanie Ruttman. This motion, made by Neal Kessler and seconded by Rhonda Mills, passed.

Brent England: Absent  
Neal Kessler: Yea  
Rhonda Mills: Yea  
Stephanie Ruttman: Yea  
Forrest Turpen: Absent

Yea: 3, Nay: 0, Absent: 2

III. **Special Recognition/Pledge of Allegiance** - Ms. Tyler Martin, Caroline Roberts and George Knowles

IV. **Special Recognition** - Ms. Tiffani Cooper - National Merit Finalists: Ty Elias, Austin Yowell, Addison Welbourn, Sean Gunter, Mallory Sepulveda

V. **Special Recognition** - Ms. Tiffaini Cooper - Academic All State: Ty Elias, Mallory Sepulveda

**VI. Reports to the Board**

A. Superintendent - Dr. Margaret Coates Dr. Coates shared information regarding upcoming legislation. The District Leadership Team had an opportunity to participate in a Zoom meeting with Speaker of the House, Representative Kyle Hilbert. They were able to ask questions and hear his perspective on what's happening in our legislature.

B. Teaching and Learning - Mr. Mark Officer Mr. Officer shared information about the Senior Conference that took place last week. It is an opportunity for students to attend various breakout sessions and hear motivational information from a keynote speaker.

C. District Services - Mr. Kerwin Koerner Mr. Koerner reported there are several projects going on throughout the district. There will be a new loop road at Bailey Elementary for drop off and pick up and reduce the amount of traffic on 96th Street. The Ag fence is almost complete and the tennis courts are being resurfaced.

D. Continuous Strategic Improvement (CSI) - Goal Area #1 Ram Achievement and Enrichment - Mr. Mark Officer Mr. Officer stated the Professional Learning Communities will be ongoing during the spring. All 6th graders have registered and completed the Individual Career Academic Plan, which will follow them through 12th grade and provide opportunities for them to expand their skills that match their interests.

## VII. Comments from the Public Regarding Agenda Items

Each individual will have five (5) minutes to share their remarks related to the specific agenda item identified by the individual when signing up to speak. Board members will not respond to public comment or answer questions posed during public comment. The total time allotted to comments from the public regarding the agenda will not exceed fifteen (15) minutes. There were no comments from the public regarding agenda items.

VIII. **Consent Agenda:** Board to consider and take possible action on the following consent agenda items. (Dr. Coates)

Motion to approve Consent Agenda items. This motion, made by Neal Kessler and seconded by Stephanie Ruttman, passed.

Brent England: Absent

Neal Kessler: Yea

Rhonda Mills: Yea

Stephanie Ruttman: Yea

Forrest Turpen: Absent

Yea: 3, Nay: 0, Absent: 2

A. Minutes of March 9, 2026 Regular Meeting

B. Teaching and Learning

i. Out of State Student Activity Trips

ii. License agreement with World Book for district access to Online World Book for the 2026-2027 school year at a cost of \$9,260.16, as outlined in the attachment and authorize the Superintendent or designee to execute the license agreement

iii. Contract with Junior Achievement for Owasso Public School Elementary 5th grade students to attend JA BizTown for the 2026-2027 school year at a cost of \$22,500.00, to be paid by school sites as outlined in the attachment and authorize the Superintendent or designee to execute the Contract

iv. Agreement with Tulsa City-County Health Department for The School Health Program for the 2026-2027 school year at a cost of \$ -0-, as outlined in the attachment and authorize the Superintendent or designee to execute the Agreement

v. Agreement with University of Tulsa to provide instruction of student teachers completing their student teaching portion of teacher preparation for the 2026-2027 school year at no cost, as outlined in the attachment and authorize the Superintendent or designee to execute the Agreement

vi. Agreement/Contract with Spears Travel for travel arrangements for OPS employees for the 2026-2027 school year with a fee schedule, as outlined in the attachment and authorize the Superintendent or designee to execute Agreement/Contract

vii. Memorandum of Understanding with The Tristesse Grief Center, Inc., a/k/a The Grief Center to provide school-based grief support for students and faculty for the 2026-2027 school year at no cost, as outlined in the attachment and authorize the Superintendent or designee to execute the MOU

viii. Agreement with Horizon: Digitally Enhanced Campus for student access to Edgenuity curriculum and Edmentum Exact Path Core content for the 2026-2027 school year at a cost of \$138,300.00, as outlined in the attachment and authorize the Superintendent or designee to execute the Agreement

ix. Memorandum of Understanding with Oklahoma State University for student interns for the 2026-2027 school year at a cost of \$ -0-, as outlined in the attachment and authorize the Superintendent or designee to execute the Memorandum of Understanding

x. License contract renewal quote with Vocabulary.com to access learning platform, teacher tools, vocab jams and detailed reporting for the 2026-2027 school year at a cost of \$25,000.00, as outlined in the attachment and authorize the Superintendent or designee to execute the license contract renewal quote

xi. License Quote with Imagine Learning for 10 Purpose Prep Concurrent user licenses for Owasso High School for the 2026-2027 school year at a cost of \$3,300.00, as outlined in the attachment and authorize the Superintendent or designee to execute the Quote License

xii. Contract with Amira for the Tutor license platform for the 6th-8th students for the 2026-2027 school year at a cost of \$10,140.00, as outlined in the attachment and authorize the Superintendent or designee to execute the Contract

xiii. Contract with Amira for the Assessment platform for the 6th-8th students for the 2026-2027 school year at a cost of \$-0-, as outlined in the attachment and authorize the Superintendent or designee to execute the Contract

xiv. Contract with Amira for the K-2 and 3-5 Suite platforms for the K-5 students for the 2026-2027 school year at a cost of \$-0-, as outlined in the attachment and authorize the Superintendent or designee to execute the Contract

### C. Technology

i. Quote from Classlink Inc. for renewal of licensing and support of account provisioning, rostering and analytics services for the 2026-2027 school year at a cost of \$39,215.10 as outlined in the attachment and authorize the Superintendent or designee to purchase

- ii. Quote from TeamViewer Germany GmbH Inc. for renewal of licensing and support of remote connections software for the 2026-2027 school year at a cost of \$10,995.00 as outlined in the attachment and authorize the Superintendent or designee to purchase
- iii. Contract with PowerSchool for renewal of licensing and support of the district student information system and related services for the 2026-2027 school year at a cost of \$87,510.54, as outlined in the attachment and authorize the Superintendent or designee to execute the agreement
- iv. Contract with PowerSchool for renewal of licensing and support of Enrollment Express and eCollect forms for the 2026-2027 school year at a cost of \$35,010.00, as outlined in the attachment and authorize the Superintendent or designee to execute the agreement
- v. Quote from VIP Technology Solutions Group for renewal of licensing of ESET AntiVirus solution for the 2026-2027 school year at a cost of \$21,500.00, as outlined in the attachment and authorize the Superintendent or designee to execute the agreement
- vi. Estimate from CDW Amplified for renewal of licensing and support of Little SIS for Classroom at a cost of \$3,925.00 and Gopher Sheets Add-On at a cost of \$2,820.00 for the 2026-2027 school year as outlined in the attachment and authorize the Superintendent or designee to purchase
- vii. Agreement with ImageNet Consulting for renewal of licensing and support of LaserFiche platform for the 2026-2027 school year at a cost of \$6,880.00, as outlined in the attachment and authorize the Superintendent or designee to purchase
- viii. Quote from ImageNet Consulting for renewal of services and support of CoreFax Cloud centralized printing and faxing platform for the 2026-2027 school year at a cost of \$4,860.00 annually, as outlined in the attachment and authorize the Superintendent or designee to purchase
- ix. Quote from Gaggle for renewal of safety management services for the 2026-2027 school year at a cost of \$55,440.00, as outlined in the attachment and authorize the Superintendent or designee to purchase
- x. Quote from Transfinder for renewal of services and support of bus routing software and related applications for the 2026-2027 school year at a cost of \$13,325.00, as outlined in the attachment and authorize the Superintendent or designee to execute the agreement
- xi. Contract with SherpaDesk, DBA BigWebApps, for renewal of licensing and support of SherpaDesk online ticketing system for the 2026-2027 school year at a cost of \$9,751.00, as outlined in the attachment and authorize the Superintendent or designee to execute the agreement
- xii. Agreement with Brightly Software Inc, for renewal of licensing and support of School Dude - Event Essentials Pro subscription for the 2026-2027 school year at a cost of \$13,823.99, as outlined in the attachment and authorize the Superintendent or designee to execute the agreement

xiii. Quote from Informatics Holding Inc. for renewal of licensing and support of WASP inventory barcode system for the 2026-2027 school year at a cost of \$4,675.00, as outlined in the attachment and authorize the Superintendent or designee to purchase

xiv. Quote from Marcia Brenner Associates for renewal of licensing and support of Report Creator PowerSchool plugin for the 2026-2027 school year at a cost of \$1,536.00, as outlined in the attachment and authorize the Superintendent or designee to purchase

xv. Quote from Freund Resources for renewal of licensing of sqlReports software for the 2026-2027 school year at a cost of \$576.00, as outlined in the attachment and authorize the Superintendent or designee to purchase

xvi. Quote from Samsara Inc for renewal of licensing and support of bus tracking platform software for the 2026-2027 school year at a cost of \$19,656.00, as outlined in the attachments and authorize the Superintendent or designee to execute the agreement

xvii. Quote from RAS Technology Consultants Inc for renewal of licensing of PSCB Custom Reports software for the 2026-2027 school year at a cost of \$1,150.00, as outlined in the attachment and authorize the Superintendent or designee to purchase

xviii. Quote from Keeper Security for renewal of licensing and support of Keeper Enterprise password manager for the 2026-2027 school year at a cost of \$1,266.00, as outlined in the attachment and authorize the Superintendent or designee to execute the agreement

xix. Quote from Integrated Register Systems Inc for renewal of licensing and support of Intouch Online Receipting system for the 2026-2027 school year at a cost of \$9,650.65, as outlined in the attachment and authorize the Superintendent or designee to execute the purchase

xx. Quote from Dell Direct Sales L.P for renewal of licensing of Microsoft 365 access for the 2026-2027 school year at a cost of \$57,744.16, as outlined in the attachment and authorize the Superintendent or designee to purchase

xxi. Quote from Solarwinds for renewal of licensing and support of network monitoring tools for the 2026-2027 school year at a cost of \$4,164.62, as outlined in the attachment and authorize the Superintendent or designee to purchase

xxii. Quote from Knowbe4 for renewal of licensing of PhisherER Plus and Security Awareness Training software for the 2026-2027 school year at a cost of \$27,558.12 as outlined in the attachment and authorize the Superintendent or designee to purchase

xxiii. Contract with CRW Consulting Inc. for renewal of Category 1 and Category 2 ERATE consulting services for the 2026-2027 school year at a cost outlined in the attachment and authorize the Superintendent or designee to execute the contract

xxiv. Quote from Instructure, Inc for renewal of licensing and support of Parchment for the 2026-2027 school year at a cost of \$13,315.05, as outlined in the attachment and authorize the Superintendent or designee to purchase

xxv. Quote from United Systems for renewal of licensing and support of Filewave Mobile Device Management system for the 2026-2027 school year at a cost of \$23,017.44, as

outlined in the attachment and authorize the Superintendent or designee to execute the agreement

xxvi. Quote from United Systems for renewal of licensing and support of Lightspeed Web Content Filter and Lightspeed Classroom Management systems for the 2026-2027 school year at a cost of \$76,200.00, as outlined in the attachment and authorize the Superintendent or designee to execute the agreement

xxvii. Quote from United Systems for renewal of licensing of Aerohive/Extreme network appliances and wireless access points for the 2026-2027 school year at a cost of \$56,060.00 as outlined in the attachment and authorize the Superintendent or designee to execute the agreement

xxviii. Quote from United Systems for renewal of support of DELL S-Series Switches for the 2026-2027 school year at a cost of \$14,266.78, as outlined in the attachment and authorize the Superintendent or designee to execute the agreement

xxix. Quote from United Systems for renewal of Fortinet Firewall licensing and support services for the 2026-2027 school year at a cost of \$60,358.38, as outlined in the attachment and authorize the Superintendent or designee to execute the agreement

xxx. Quote from United Systems for renewal of licensing of Aruba network appliances and wireless access points for the 2026-2027 school year at a cost of \$25,143.10 as outlined in the attachment and authorize the Superintendent or designee to execute the agreement

xxxi. Contract with Artlist for renewal of the Motion Array Content License Agreement for the 2026-2027 school year at a cost of \$6,413.00 as outlined in the attachment and authorize the Superintendent or designee to execute the contract

#### D. Finance

i. Purchase orders (encumbrances) and changes to encumbrances for March 2026 2025-2026 General Fund #1457-1618 (Vendors) \$130,899.50  
2025-2026 General Fund Net Change Orders \$126.47  
2025-2026 Building Fund #94 (Vendors) \$5,000.00  
2025-2026 Bond Fund 31 #359-386 (Vendors) \$394,449.83  
2025-2026 Bond Fund 04-BOK #11-21 (Vendors) \$672,386.93

ii. Activity Financial Report for March 2026

iii. Activity Account Budgets

iv. Quote from Clearwater Enterprises for renewal of natural gas supplier agreement for the 2026-2027 fiscal year at a cost of \$0.06/MMBtu above sellers' cost

#### E. Human Resources

i. Transitions

### IX. Teaching and Learning -Mark Officer

A. Board to consider and take possible action on the proposed edits, changes, and additions to Policy #5.37, as outlined in the attachment

Motion to approve the proposed edits, changes, and additions to Policy #5.37, as outlined in the attachment. This motion, made by Stephanie Ruttman and seconded by Neal Kessler, passed.

Brent England: Absent  
Neal Kessler: Yea  
Rhonda Mills: Yea  
Stephanie Ruttman: Yea  
Forrest Turpen: Absent

Yea: 3, Nay: 0, Absent: 2

B. Board to consider and take possible action on the Provider Agreement with the Ottawa Tribe for Barnes Elementary tribal subsidy for the 2025- 2026 school year at a cost of \$-0-, as outlined in the attachment and authorize the Superintendent or designee to execute the Provider Agreement

Motion to approve the Provider Agreement with the Ottawa Tribe for Barnes Elementary tribal subsidy for the 2025-2026 school year at a cost of \$-0-, as outlined in the attachment and authorize the Superintendent or designee to execute the Provider Agreement. This motion, made by Neal Kessler and seconded by Stephanie Ruttman, passed.

Brent England: Absent  
Neal Kessler: Yea  
Rhonda Mills: Yea  
Stephanie Ruttman: Yea  
Forrest Turpen: Absent

Yea: 3, Nay: 0, Absent: 2

C. Board to consider and take possible action on the Agreement with Vamonos Tours for the OHS Spanish Student Group Trip to Costa Rica for the 2026- 2027 school year at a cost as outlined in the attachment and authorize the Superintendent or designee to execute the Agreement

Motion to approve the Agreement with Vamonos Tours for the OHS Spanish Student Group Trip to Costa Rica for the 2026-2027 school year at a cost as outlined in the attachment and authorize the Superintendent or designee to execute the Agreement. This motion, made by Stephanie Ruttman and seconded by Neal Kessler, passed.

Brent England: Absent  
Neal Kessler: Yea  
Rhonda Mills: Yea  
Stephanie Ruttman: Yea  
Forrest Turpen: Absent

Yea: 3, Nay: 0, Absent: 2

#### **X. District Services - Kerwin Koerner**

A. Board to consider and take possible action on the Guaranteed Maximum Price (GMP) amendment to the existing AIA contract with Nabholz Construction Corporation for the 5th Grade Center civil package

Motion to approve the Guaranteed Maximum Price (GMP) amendment to the existing AIA contract with Nabholz Construction Corporation for the 5th Grade Center civil package. This motion, made by Neal Kessler and seconded by Stephanie Ruttman, passed.

Brent England: Absent  
Neal Kessler: Yea  
Rhonda Mills: Yea  
Stephanie Ruttman: Yea  
Forrest Turpen: Absent

Yea: 3, Nay: 0, Absent: 2

B. Board to consider and take possible action on the Guaranteed Maximum Price (GMP) amendment to the existing AIA contract with Lowry Construction Services for the 8th Grade Center building and remodel project

Motion to approve the Guaranteed Maximum Price (GMP) amendment to the existing AIA contract with Lowry Construction Services for the 8th Grade Center building and remodel project. This motion, made by Neal Kessler and seconded by Stephanie Ruttman, passed.

Brent England: Absent  
Neal Kessler: Yea  
Rhonda Mills: Yea  
Stephanie Ruttman: Yea  
Forrest Turpen: Absent

Yea: 3, Nay: 0, Absent: 2

#### XI. **Technology** - Dr. Michelle Baker

A. Board to consider and take possible action on the Quote from United Systems for the purchase of Fortinet FG-3001F Firewall / FortiAnalyzer / FortiManager, installation, and management at a cost of \$257,379.46, as outlined in the attachment and authorize the Superintendent or designee to execute the Quote

Motion to approve the Quote from United Systems for the purchase of Fortinet FG-3001F Firewall / FortiAnalyzer / FortiManager, installation, and management at a cost of \$257,379.46, as outlined in the attachment and authorize the Superintendent or designee to execute the Quote. This motion, made by Stephanie Ruttman and seconded by Neal Kessler, passed.

Brent England: Absent  
Neal Kessler: Yea  
Rhonda Mills: Yea  
Stephanie Ruttman: Yea  
Forrest Turpen: Absent

Yea: 3, Nay: 0, Absent: 2

B. Board to consider and take possible action on the Quote from ePlus for the renewal of VMWare Cloud Foundation at a cost of \$88,704.00, as outlined in the attachment and authorize the Superintendent or designee to execute the Quote

Motion to approve the Quote from ePlus for the renewal of VMWare Cloud Foundation at a cost of \$88,704.00, as outlined in the attachment and authorize the Superintendent or designee to execute the Quote. This motion, made by Neal Kessler and seconded by Stephanie Ruttman, passed.

Brent England: Absent  
Neal Kessler: Yea  
Rhonda Mills: Yea  
Stephanie Ruttman: Yea  
Forrest Turpen: Absent  
Yea: 3, Nay: 0, Absent: 2

## XII. Finance - Phillip Storm

A. Board to consider and take possible action on the Treasurer's Report for March 2026  
Motion to approve the Treasurer's report for March 2026. This motion, made by Neal Kessler and seconded by Stephanie Ruttman, passed.

Brent England: Absent  
Neal Kessler: Yea  
Rhonda Mills: Yea  
Stephanie Ruttman: Yea  
Forrest Turpen: Absent  
Yea: 3, Nay: 0, Absent: 2

B. Board to consider and take action on a resolution determining the maturities of, and setting a date, time and place for the sale of the \$23,500,000 General Obligation Building Bonds of the School District

Motion to approve a resolution determining the maturities of, and setting a date, time and place for the sale of the \$23,500,000 General Obligation Building Bonds of the School District. This motion, made by Stephanie Ruttman and seconded by Neal Kessler, passed.

Brent England: Absent  
Neal Kessler: Yea  
Rhonda Mills: Yea  
Stephanie Ruttman: Yea  
Forrest Turpen: Absent  
Yea: 3, Nay: 0, Absent: 2

C. Consider and Approve an Agreement for Bond Counsel Services with Hilborne and Weidman

Motion to approve an Agreement for Bond Counsel Services with Hilborne and Weidman. This motion, made by Neal Kessler and seconded by Stephanie Ruttman, passed.

Brent England: Absent  
Neal Kessler: Yea  
Rhonda Mills: Yea  
Stephanie Ruttman: Yea

Forrest Turpen: Absent

Yea: 3, Nay: 0, Absent: 2

D. Board to Consider and Take Possible Action on Temporary Appropriations for 2026-2027  
Motion to approve the Temporary Appropriations for 2026-2027. This motion, made by Stephanie Ruttman and seconded by Neal Kessler, passed.

Brent England: Absent

Neal Kessler: Yea

Rhonda Mills: Yea

Stephanie Ruttman: Yea

Forrest Turpen: Absent

Yea: 3, Nay: 0, Absent: 2

E. Board to Consider and Take Possible Action On Substitute Bus Aide Pay Scale  
Motion to approve the Substitute Bus Aide Pay Scale. This motion, made by Stephanie Ruttman and seconded by Neal Kessler, passed.

Brent England: Absent

Neal Kessler: Yea

Rhonda Mills: Yea

Stephanie Ruttman: Yea

Forrest Turpen: Absent

Yea: 3, Nay: 0, Absent: 2

### XIII. **Human Resources** - Lisa Johnson

A. Board to consider and take possible action on a resignation agreement between the District and child nutrition manager Patricia Sundberg and to authorize the Board President to execute the resignation agreement on behalf of the district

Motion to approve a resignation agreement between the District and child nutrition manager Patricia Sundberg and to authorize the Board President to execute the resignation agreement on behalf of the district. This motion, made by Neal Kessler and seconded by Stephanie Ruttman, passed.

Brent England: Absent

Neal Kessler: Yea

Rhonda Mills: Yea

Stephanie Ruttman: Yea

Forrest Turpen: Absent

Yea: 3, Nay: 0, Absent: 2

B. Board to consider and take possible action on a resignation agreement between the District and teacher Tracie Nowotny and to authorize the Board President to execute the resignation agreement on behalf of the district

Motion to approve a resignation agreement between the District and teacher Tracie Nowotny and to authorize the Board President to execute the resignation agreement on behalf of the district. This motion, made by Stephanie Ruttman and seconded by Neal Kessler, passed.

Brent England: Absent  
Neal Kessler: Yea  
Rhonda Mills: Yea  
Stephanie Ruttman: Yea  
Forrest Turpen: Absent  
Yea: 3, Nay: 0, Absent: 2

#### XIV. **Executive Session**

A. Vote to convene into executive session for the purpose of discussing the hiring of one Special Education Director authorized by Okla.Stat.Tit.25§307(B)(1)  
Motion at 7:31p.m.to convene into executive session for the purpose of discussing the hiring of one Special Education Director. This motion, made by Stephanie Ruttman and seconded by Neal Kessler, passed.

Brent England: Absent  
Neal Kessler: Yea  
Rhonda Mills: Yea  
Stephanie Ruttman: Yea  
Forrest Turpen: Absent  
Yea: 3, Nay: 0, Absent: 2

#### B. Statement of Executive Session Minutes

During the executive session, the members of the Board of Education who were present were Stephanie Ruttman, Rhonda Mills, Neal Kessler, Brent England and Frosty Turpen. Also present during the executive session was Mr. Mark Officer and Dr. Margaret Coates. During the executive session, board members discussed the hiring of one Director of Special Education. Nothing else was discussed, and no votes were taken. This will constitute the minutes of the executive session.

#### C. Acknowledge return to Open Session Acknowledge return to Open Session at 7:38p.m.

#### XV. Board to consider and take possible action to hire an individual as the Director of Special Education

Motion to hire Dr. Matthew Brunk as the Director of Special Education. This motion, made by Neal Kessler and seconded by Stephanie Ruttman, passed.

Brent England: Absent  
Neal Kessler: Yea  
Rhonda Mills: Yea  
Stephanie Ruttman: Yea  
Forrest Turpen: Absent  
Yea: 3, Nay: 0, Absent: 2

#### XVI. **New Business** There was no New Business.

**XVII. Comments from the Public Regarding Non-Agenda Items**

Each individual will have five (5) minutes to share their remarks related to the specific non-agenda item received in writing by the board minutes clerk seven (7) days prior to the board meeting date. The total time allotted to comments from the public regarding non-agenda items will not exceed fifteen (15) minutes.

A. Frank Blair

B. Landon Mortimer

**XVIII. Vote to Adjourn** Motion to adjourn at 7:46p.m.

Motion to adjourn at 7:46p.m. This motion, made by Stephanie Ruttman and seconded by Neal Kessler, passed.

Brent England: Absent

Neal Kessler: Yea

Rhonda Mills: Yea

Stephanie Ruttman: Yea

Forrest Turpen: Absent

Yea: 3, Nay: 0, Absent: 2

## MINUTES AND RESOLUTION AUTHORIZING SALE OF BONDS

The Board of Education of Independent School District Number 11 of Tulsa County, Oklahoma, met in Regular Session at the Conference Room, Dale C. Johnson Education Service Center, Owasso Public Schools, 1501 North Ash, Owasso, Oklahoma, in said School District on the 13th day of April, 2026, at 6:30 o'clock p.m.

PRESENT: RHONDA MILLS, President; NEAL KESSLER, Vice President and Deputy Clerk, STEPHANIE RUTTMAN, Member

ABSENT: BRENT ENGLAND, Clerk and Member; FORREST J. TURPIN, Member

Notice of the schedule of regular meetings of the School District for the calendar year 2026 was given in writing, to the County Clerk of Tulsa County, Oklahoma at 9:03 o'clock a.m. on the 13th day of August, 2025, and public notice of this meeting, setting forth the date, time, place and agenda was posted at the entrance of the Board of Education Room located in the Dale C. Johnson Education Service Center, in prominent view and open to the public twenty-four (24) hours each day, seven (7) days each week at 3:45 o'clock p.m. on the 10th day of April, 2026, being twenty-four (24) hours or more prior to this meeting, excluding Saturdays, Sundays, and State designated legal holidays, all in compliance with the Oklahoma Open Meeting Act (as attached hereto).

### (OTHER PROCEEDINGS)

Thereupon **MILLS** introduced a Resolution which was read in full by the Clerk, and upon motion by **RUTTMAN**, seconded by **KESSLER**, was adopted by the following vote:

AYE: MILLS, KESSLER, RUTTMAN

NAY: None

Said Resolution was thereupon signed by the President, attested by the Clerk, sealed with the seal of said School District, and is as follows:

### RESOLUTION

A resolution fixing the amount of bonds to mature each year, fixing the time and place the bonds are to be sold, and authorizing the clerk to give notice of said sale as required by law.

WHEREAS, the issuance of \$169,180,000 of General Obligation Building Bonds by Independent School District No. 11 of Tulsa County, Oklahoma, has been duly authorized at an election held on the 9th day of September, 2025, for that purpose; and

WHEREAS, \$7,400,000 of the \$169,180,000 has previously been sold, issued and delivered, and the Board of Education of Independent School District No. 11 of Tulsa County, Oklahoma, now desires to sell a second installment of \$23,500,000;

Now, therefore, be it resolved by the Board of Education of Independent School District No. 11 of Tulsa County, Oklahoma:

#### SECTION 1.

That the \$23,500,000 of General Obligation Building Bonds of Independent School District No. 11 of Tulsa County, Oklahoma, voted on the 9th day of September, 2025, shall be offered for sale at the Conference Room, Dale C. Johnson Education Service Center, Owasso Public Schools, 1501 North Ash, Owasso, Oklahoma, on the 20th day of May, 2026, at 11:30 o'clock a.m.; said Bonds to become due:

\$5,875,000 in two years from their date, and \$5,875,000 annually each year thereafter until paid.

SECTION 2.

That the Clerk of the Board of Education is hereby ordered and directed to cause notice of the sale of said Bonds to be given as required by law.

ADOPTED this 13th day of April, 2026.

  
\_\_\_\_\_  
President, Board of Education

ATTEST:

  
\_\_\_\_\_  
Deputy Clerk, Board of Education

(SCHOOL DISTRICT SEAL)



Owasso Board of Education Special Meeting  
Friday, April 24, 2026 12:00 PM Central

Board of Education Conference Room of the Dale C. Johnson Education Service Center  
1501 N Ash St.  
Owasso, Oklahoma 74055

**I. Call to Order and Roll Call**

Attendance Taken at 12:00 PM.

Brent England: Present  
Neal Kessler: Present  
Rhonda Mills: Absent  
Stephanie Ruttman: Present  
Forrest Turpen: Present

Present: 4, Absent: 1.

**II. Consent Agenda:** Board to consider and take possible action on the following consent agenda items. (Dr. Coates)

Motion to approve Consent Agenda items. This motion, made by Stephanie Ruttman and seconded by Brent England, passed.

Brent England: Yea  
Neal Kessler: Yea  
Rhonda Mills: Absent  
Stephanie Ruttman: Yea  
Forrest Turpen: Yea

Yea: 4, Nay: 0, Absent: 1

**A. Finance**

- i. Purchase orders (encumbrances) and changes to encumbrances for April 2026 2025-2026  
General Fund # (Vendors) \$  
2025-2026 General Fund Net Change Orders \$  
2025-2026 Building Fund # (Vendors) \$  
2025-2026 Child Nutrition Fund # (Vendors) \$  
2025-2026 Bond Fund 31 # (Vendors) \$  
2025-2026 Bond Fund 39 # (Vendors) \$  
2025-2026 Bond Fund 04-BOK #(Vendors) \$

- ii. Service Contract with ArbiterSports, LLC for a one-year schedule license program subscription for the 2026-2027 school year at a price of \$915.00 as outlined in the attachment and authorize the Superintendent or designee to execute the Service Contract

**B. Human Resources**

- i. Transitions

**III. Finance**

A. Board to consider and take possible action on a Memorandum of Understanding with Owasso Education Association to add and amend extra-duty stipends for the positions listed in the attachment for the 2026-2027 School Year

Motion to approve a Memorandum of Understanding with Owasso Education Association to add and amend extra-duty stipends for the positions listed in the attachment for the 2026-2027 School Year. This motion, made by Forrest Turpen and seconded by Brent England, passed.

Brent England: Yea  
Neal Kessler: Yea  
Rhonda Mills: Absent  
Stephanie Ruttman: Yea  
Forrest Turpen: Yea  
Yea: 4, Nay: 0, Absent: 1

#### **IV. Human Resources**

A. Board to consider and take possible action on a resignation agreement between the District and teacher April Jakovac and to authorize the Board President to execute the resignation agreement on behalf of the district

Motion to approve the resignation agreement between the District and teacher April Jokovac and to authorize the Board President to execute the resignation agreement on behalf of the district. This motion, made by Stephanie Ruttman and seconded by Brent England, passed.

Brent England: Yea  
Neal Kessler: Yea  
Rhonda Mills: Absent  
Stephanie Ruttman: Yea  
Forrest Turpen: Yea  
Yea: 4, Nay: 0, Absent: 1

#### **V. Executive Session**

A. Vote to convene into executive session for the purpose of discussing the hiring one Director of Band Operations as authorized by Okla.Stat.Tit.25§307(B)(1).

Motion to convene into executive session at 12:05p.m. for the purpose of discussing the hiring one Director of Band Operations. This motion, made by Brent England and seconded by Forrest Turpen, passed.

Brent England: Yea  
Neal Kessler: Yea  
Rhonda Mills: Absent  
Stephanie Ruttman: Yea  
Forrest Turpen: Yea  
Yea: 4, Nay: 0, Absent: 1

B. Acknowledge return to Open Session Acknowledge return to Open Session at 12:18p.m.

C. Statement of Executive Session Minutes

During the executive session, the members of the Board of Education who were present were Stephanie Ruttman, Neal Kessler, Brent England and Frosty Turpen. Also present during the executive session was Mr. Mark Officer and Dr. Margaret Coates. During the executive session, board members discussed the hiring of one Director of Band Operations. Nothing else was discussed and no votes were taken. This will constitute the minutes of the executive session.

VI. Board to consider and take possible action to hire an individual as the Director of Band Operations.

Motion to hire Mr. Brady Hollon as the Director of Band Operations. This motion, made by Stephanie Ruttman and seconded by Brent England, passed.

Brent England: Yea  
Neal Kessler: Yea  
Rhonda Mills: Absent  
Stephanie Ruttman: Yea  
Forrest Turpen: Yea

Yea: 4, Nay: 0, Absent: 1

**VII. Vote to Adjourn**

Motion to adjourn at 12:22p.m. This motion, made by Stephanie Ruttman and seconded by Brent England, passed.

Brent England: Yea  
Neal Kessler: Yea  
Rhonda Mills: Absent  
Stephanie Ruttman: Yea  
Forrest Turpen: Yea

Yea: 4, Nay: 0, Absent: 1

## **May 11, 2026 Overnight/Out of State Student Activity Requests**

- **June 17-19, 2026 - Pitt State Girls Basketball Camp - Varsity Girls Basketball - Pittsburg, Kansas**
- **June 19, 2026 - Bluff Dwellers Cave - Owasso Indian Education Summer Enrichment - Noel, MO**
- **September 2-5, 2026 - Joplin Softball Tournament - OHS Softball - Joplin, MO**
- **September 24-26, 2026 - Kansas City Stampede Softball Tournament OHS Softball - Kansas City, MO**
- **October 14-19, 2026 - Providence Cup - Denver Tournament - Owasso Mock Trial - Denver/Golden, CO**

MEMORANDUM OF UNDERSTANDING BETWEEN SOUTHWESTERN  
OKLAHOMA STATE UNIVERSITY AND OWASSO PUBLIC SCHOOLS FOR THE  
CONDUCT OF CLINICAL FIELD EXPERIENCES FOR CANDIDATES IN THE  
SCHOOL PSYCHOLOGY GRADUATE PROGRAM

THIS AGREEMENT is between Southwestern Oklahoma State University School Psychometry and School Psychology Programs, hereinafter referred to as the "University," and Owasso Public Schools, hereinafter referred to as the "District." It is understood that the participating institutions will cooperate in the conduct of school psychological services as described below.

**PURPOSE OF AGREEMENT**

This agreement provides the terms under which the District will provide on-site school psychology experiences to candidates who are enrolled in the Educational Specialist Degree Program in School Psychology.

**SCOPE OF THE PROGRAM**

The University makes no agreement to provide any specified number of students to the program at the District and the District makes no agreement to accept a specified number from the University.

**THE UNIVERSITY AGREES TO:**

1. Provide the District with copies of policies and requirements related to field experiences and school psychology.
2. Appoint a representative of the University to communicate with the site supervisor and school psychology interns to assist in the supervision and evaluation of the student internship experiences.
3. Have a representative(s) of the University available to the District for assistance and consultation as the need arises and when possible.
4. Advise students of their responsibilities regarding participation in the on-site internship process, including professional conduct and following rules and standards set by the District and University.
5. The University assumes no liability for the actions taken by the students in training during the time that they participate in field experiences in the District.
6. The University recognizes the District's interest in providing the most secure environment when possible for the District's students; therefore, the University agrees it will act under this Agreement in compliance with 70 O.S. §6-101.48. Specifically, the University will not permit any candidate under its authority to come on to school premises for any activity covered by this Agreement if that person is currently registered or required to register under the Oklahoma Sex Offenders Registration Act or has been convicted in this state, the United States, or another state of a felony offense unless ten (10) years has elapsed since the date of the criminal conviction.

7. The University agrees to protect the privacy of the District student information and educational records in accordance with the Family Educational Rights and Privacy Act of 1974, as Amended (FERPA), and to educate the University's candidates on the requirement to protect District student information.

THE DISTRICT AGREES TO:

1. Provide an on-site experience, which is pertinent and meaningful, for students enrolled in school psychology preparation at the University.
2. Provide quality supervision of the student(s) in the on-site school psychology program.
3. Keep the University informed regarding the performance of candidates and to notify and consult with the University any time the student is not meeting expectations or maintaining satisfactory progress.

THE UNIVERSITY AND THE DISTRICT JOINTLY AGREE:

1. In compliance with federal law including the provisions of Title IX of the Education Amendment of 1972, Sections 503 and 504 of the Rehabilitation Act of 1973, and the Americans with Disabilities Act of 1990, the parties hereto will not discriminate on the basis of race, sex, religion, color, national or ethnic origin, age, disability, or military service in its administration of its policies, programs, or activities; its admission policies; other programs; or employment.
2. That, in the case of internship opportunities, there will be meetings of representatives of both the University and the District as often as such meetings are needed to coordinate and improve the program, and at the convenience of both parties.
3. That there will be on-going, open communication between the University and the District to insure understanding of the expectations and the roles of both institutions in providing onsite experience for students.
4. That either the University or the District may drop a student enrolled in the program, if, in the opinion of either party, the student is not making satisfactory progress in the program. Any student who does not satisfactorily complete the program or any portion thereof may repeat the course at the same District only with the written approval of both the District and the University.

TERM OF AGREEMENT, MODIFICATION, TERMINATION:

This Agreement shall be effective when executed by both parties and shall remain in effect for a period of one (1) year from date of inception. After the initial period, this Agreement may be renewed by mutual agreement of both parties. This agreement may be revised or modified by written amendment when both parties agree to such amendment. This Agreement may be terminated without cause by ninety (90) days written notice from either party to the other.

AGREED:

On behalf of OWASSO PUBLIC  
SCHOOLS

On behalf of SOUTHWESTERN OKLAHOMA  
STATE UNIVERSITY

\_\_\_\_\_  
Signature

  
\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name

**Jason L Johnson**  
\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

**Provost & Vice President of Academic Affairs**  
\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

**4/15/2026**  
\_\_\_\_\_  
Date

# INDEPENDENT CONTRACTOR AGREEMENT

THIS INDEPENDENT CONTRACTOR AGREEMENT (THE "AGREEMENT") IS MADE AND ENTERED INTO AS OF JULY 1, 2026.

BY AND BETWEEN CLIENT: OWASSO PUBLIC SCHOOL DISTRICT  
AND  
CONTRACTOR: CONNECTED KIDS, INC.

## THE PURPOSE OF HIRING THE CONTRACTOR

The Client has engaged the contractor for the purpose of providing trauma-responsive onsite coaching and consulting for nine elementary sites. The client is of the opinion that the contractor has the necessary qualifications, experiences, and abilities to provide services to the Client.

## SERVICES PROVIDED AND START DATE

The client agrees to engage the contractor to provide the following services:

- Coaching, Consultation, and Training Services
  - o August 2026-May 2027

## AGREED UPON EXPECTATIONS OF THE CLIENT (OWASSO SCHOOL DISTRICT)

The district agrees to:

1. Continue educating Owasso Public School employees on
  - a. the impact of trauma on students
  - b. appropriate strategies for working with students of trauma
2. Support trauma responsive efforts at school sites to enhance learning outcomes for students of trauma
3. Assist with facilitating communication, processes, observations, meetings, training, and feedback between Connected Kids, school sites, teachers, and parents, as appropriate
4. Utilize a referral/selection process that promotes the proper identification and equity of support for students of trauma across the district. Data utilized in processes may include:
  - Information from Teacher/Counselor/Principal
  - Observations
  - Parent Release of Information
  - Information from Outside Practitioners: pediatricians, therapists, case managers, etc.
  - Teacher Assessment (Brain Map)
  - Student Behavior Analysis (Suspensions, etc.)

## **AGREED UPON EXPECTATIONS OF THE CONTRACTOR (CONNECTED KIDS)**

The contractor agrees to provide the following services:

1. Collaborate with Owasso Public School sites on behalf of students and staff by providing on-going coaching and consultation to benefit OPS students
2. Engage in student observations, assessments, behavioral recommendations, and meetings to support student success in their learning environment
3. Provide clear and open communication between all parties
  - Site leaders and teachers
  - District leaders and supports
  - Parents/guardians
4. Utilize a referral/selection process that promotes the proper identification and equity of support for students of trauma across the district. Data utilized in processes may include:
  - Information from Teacher/Counselor/Principal
  - Observations
  - Parent Release of Information
  - Information from Outside Practitioners: pediatricians, therapists, case managers, etc.
  - Teacher Assessment (Brain Map)
  - Student Behavior Analysis (Suspensions, etc.)
5. Attend and participate in meetings on behalf of students with staff and/or parents
6. Assessment for OPS students at no additional cost
7. Professional development opportunities for OPS teachers/staff with Connected Kids
  - Occurring throughout the school year on professional development days, collaboration days, and as needed for specified teams or events
8. Free parent training opportunities/classes

### **CONTRACTOR PROVISION & COMPENSATION**

Contractor will bill the client at the applicable rates monthly.

- 1 Full-Time Consultant (Anna Kelter of Connected Kids)
  - To be billed in monthly invoice
  - Rate of Pay: \$50 per hour
  - 7 Hours per week to flex for site and student needs via coaching, consultation, observation, and meetings
- On-Site Professional Development Trainer (Anna Kelter of Connected Kids)
  - To be billed in monthly invoice, at cost of \$250 per hour, when applicable

- Total not to exceed \$6,000 of this contract

The contractor is not an employee of Owasso Public Schools and is responsible for their own taxes, insurances, benefits, and liabilities.

Any variation or modification of the employee provision for compensation section of this agreement will be mutually agreed upon in advance and documented in writing with an addendum.

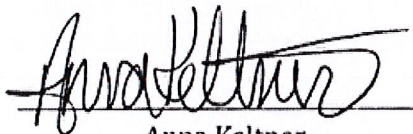
### **CONTRACT PROJECTION**

1. Consultation Expenses for Trauma Responsiveness
  - \$50 per hr; 7 hrs per week; 36 weeks
  - Potential Total = **\$12,600**
2. Professional Development Training for Trauma Responsiveness
  - \$250 per hour, as needed
  - Not to exceed \$6,000
3. **Potential Total Program Cost = \$ 18,600**

### **END DATE**

This contract is to end June 1, 2027 at which time the contract may be renegotiated and revised as agreed upon by both parties.

We the undersigned agree to the terms and conditions outlined in this contract.



Anna Keltner  
Connected Kids

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Chairman of the Board  
Owasso Public Schools



**Quote #:** Q-40778-2  
**Created Date:** 2026-02-09  
**Account Name:** Owasso School District

**Issued by:** Katherine Bakley  
**Email:** katherine.bakley@brainpop.com  
**Phone:** 332-286-1559

**Bill to Name:** Owasso School District  
**Bill To:** 1501 North Ash Street  
 Owasso, OK 74055

**Notes:**  
 prorated to end on June 30, 2027

Name	Quantity	Description	Unit Price	DISC (%)	Total
BrainPOP Elementary School Bundle	10	School-wide subscription to BrainPOP Jr., BrainPOP 3-8, BrainPOP Español, and BrainPOP Français with access to over 1,200 topics to ensure every student can confidently access grade-level curriculum with background knowledge.  Teachers will have access to an on-demand professional learning course to support an effective implementation.	USD 4,174.32	46.78	USD 41,743.16
BrainPOP Elementary School Bundle	1	School-wide subscription to BrainPOP Jr., BrainPOP 3-8, BrainPOP Español, and BrainPOP Français with access to over 1,200 topics to ensure every student can confidently access grade-level curriculum with background knowledge.  Teachers will have access to an on-demand professional learning course to support an effective implementation.	USD 0.00	100.00	USD 0.00
District Professional Learning for K-8 Schools (1 hour)	1	One hour of virtual professional learning customized to ensure BrainPOP meets the curriculum goals of your K-8 schools. The hour can be used for instructional coach support.	USD 589.04	0.00	USD 589.04
<b>Total:</b>					USD 42,332.20

Subtotal: USD 86,436.26  
 Discount: 51.0 %

Grand Total: USD 42,332.20

Provisions

Access Recipient	Product Name	Access Start Date	Access End Date
Larkin Bailey Elementary School	BrainPOP Jr. (K-3) School Subscription	7/27/2026	6/30/2027
Hayward Smith Elementary School	BrainPOP (3-8) School Subscription	7/27/2026	6/30/2027

<b>Access Recipient</b>	<b>Product Name</b>	<b>Access Start Date</b>	<b>Access End Date</b>
Barnes Elementary School	BrainPOP Jr. (K-3) School Subscription	7/27/2026	6/30/2027
Larkin Bailey Elementary School	BrainPOP (3-8) School Subscription	7/27/2026	6/30/2027
Owasso 6th Grade Center	BrainPOP Jr. (K-3) School Subscription	7/27/2026	6/30/2027
Mills Elementary School	BrainPOP (3-8) School Subscription	7/27/2026	6/30/2027
Stone Canyon Elementary School	BrainPOP Español and BrainPOP Français School Subscription	7/27/2026	6/30/2027
Lucille Ellingwood Morrow Elementary	BrainPOP Español and BrainPOP Français School Subscription	7/27/2026	6/30/2027
Owasso 6th Grade Center	BrainPOP (3-8) School Subscription	7/27/2026	6/30/2027
Northeast Elementary School	BrainPOP (3-8) School Subscription	7/27/2026	6/30/2027
Barnes Elementary School	BrainPOP Español and BrainPOP Français School Subscription	7/27/2026	6/30/2027
Owasso School District Summer School	BrainPOP Español and BrainPOP Français School Subscription	8/15/2026	6/30/2027
Ator Elementary School	BrainPOP Español and BrainPOP Français School Subscription	7/27/2026	6/30/2027
Stone Canyon Elementary School	BrainPOP (3-8) School Subscription	7/27/2026	6/30/2027
Owasso School District Summer School	BrainPOP (3-8) School Subscription	8/15/2026	6/30/2027
Northeast Elementary School	BrainPOP Español and BrainPOP Français School Subscription	7/27/2026	6/30/2027
Owasso School District Summer School	BrainPOP Jr. (K-3) School Subscription	8/15/2026	6/30/2027
Lucille Ellingwood Morrow Elementary	BrainPOP (3-8) School Subscription	7/27/2026	6/30/2027
Pamela Hodson Elementary School	BrainPOP Español and BrainPOP Français School Subscription	7/27/2026	6/30/2027
Ator Elementary School	BrainPOP Jr. (K-3) School Subscription	7/27/2026	6/30/2027
Hayward Smith Elementary School	BrainPOP Jr. (K-3) School Subscription	7/27/2026	6/30/2027
Lucille Ellingwood Morrow Elementary	BrainPOP Jr. (K-3) School Subscription	7/27/2026	6/30/2027
Mills Elementary School	BrainPOP Jr. (K-3) School Subscription	7/27/2026	6/30/2027

<b>Access Recipient</b>	<b>Product Name</b>	<b>Access Start Date</b>	<b>Access End Date</b>
Northeast Elementary School	BrainPOP Jr. (K-3) School Subscription	7/27/2026	6/30/2027
Pamela Hodson Elementary School	BrainPOP Jr. (K-3) School Subscription	7/27/2026	6/30/2027
Stone Canyon Elementary School	BrainPOP Jr. (K-3) School Subscription	7/27/2026	6/30/2027
Ator Elementary School	BrainPOP (3-8) School Subscription	7/27/2026	6/30/2027
Barnes Elementary School	BrainPOP (3-8) School Subscription	7/27/2026	6/30/2027
Pamela Hodson Elementary School	BrainPOP (3-8) School Subscription	7/27/2026	6/30/2027
Hayward Smith Elementary School	BrainPOP Español and BrainPOP Français School Subscription	7/27/2026	6/30/2027
Larkin Bailey Elementary School	BrainPOP Español and BrainPOP Français School Subscription	7/27/2026	6/30/2027
Mills Elementary School	BrainPOP Español and BrainPOP Français School Subscription	7/27/2026	6/30/2027
Owasso 6th Grade Center	BrainPOP Español and BrainPOP Français School Subscription	7/27/2026	6/30/2027

**By checking this box, we confirm that we do not require a Purchase Order (PO) in order to process payment. We agree that a signed quote alone is sufficient to authorize, initiate, and invoice this order. Our signature, written approval, or continued engagement following receipt of this quote constitutes acceptance of and agreement to purchase the goods and/or services described herein.**

**Authorized Signature:** \_\_\_\_\_

**Date:** \_\_\_\_/\_\_\_\_/\_\_\_\_

**Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_

\*Please include any applicable tax exemption certificates for the school/district along with your order.

Quote valid for 90 days. All amounts listed are in USD. This subscription is governed by the Terms of Use and Privacy Policy posted on [www.brainpop.com](http://www.brainpop.com), as amended from time to time. By accepting this quote, you agree to these terms. Changes/modifications to the terms must be approved and signed by an authorized representative of BrainPOP. Terms and conditions submitted with any Purchase Order shall not apply to this subscription. If the Customer has a signed agreement with BrainPOP that is applicable to this subscription, then that agreement will apply.

Remit to BrainPOP Accounts Receivable PO BOX 28119 | New York, NY 10087-8119 | Fax 866-867-6629 Please make all checks payable to "BrainPOP".  
Email: [purchaseorders@brainpop.com](mailto:purchaseorders@brainpop.com)



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Child Care & Development

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Tahlequah, OK 74465  
(918) 453-5300 Main Phone  
(918) 458-7616 Main Fax  
(918) 458-4446 Subsidy Fax

**CHILD CARE AUTHORIZATION APPLICATION**  
(Licensed Center or Home)

**Facility Information**

CN ID (office use only):

Facility or Provider Name: <b>DWASSO 6<sup>th</sup> Grade Center - SPARK</b>		
Email: <b>melissa.zumwalt@dwassops.org</b>		
Business Phone: <b>918-274-1901</b>	Cell Phone:	
Physical Street Address: <b>8101 N 129<sup>th</sup> E Ave</b>	City, State, Zip: <b>DWASSO, OK 74055</b>	
Mailing Address (if different from above): <b>1501 N. Ash St.</b>	City, State, Zip: <b>DWASSO, OK 74055</b>	
OKDHS License Number: <del>XXXXXXXX</del> <b>K8-30056546</b>	Licensed Capacity: <b>50</b>	
OKDHS Licensing Caseworker Name:	County: <b>Tulsa</b>	
Type of Organization: <input type="checkbox"/> Individual/Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation/Inc. <input type="checkbox"/> LLC-Limited Liability Company <input checked="" type="checkbox"/> Public School <input type="checkbox"/> Tribal <input type="checkbox"/> Other: _____		
Type of Facility: <input type="checkbox"/> Child Care Center <input type="checkbox"/> Large Family Child Care Home <input type="checkbox"/> Small Family Child Care Home <input checked="" type="checkbox"/> Before & After Care/Public School (operates year-round: <input type="checkbox"/> yes <input checked="" type="checkbox"/> no)		
Star Status (Centers must be a minimum of a Two Star to contract with Cherokee Nation for services): <input type="checkbox"/> One Star <input type="checkbox"/> Two Star <input checked="" type="checkbox"/> Three Star <input type="checkbox"/> Four Star <input type="checkbox"/> Five Star		
Ages of Children Accepted for Care: <b>11-14 years</b>	Days of Operation: <b>Mon-Fri</b>	Hours of Operation: <b>2:45-6:00pm</b>
Director Full Name (if applicable): <b>Melissa Zumwalt</b>	Director Cell Phone: <b>918-798-2322</b>	

**Owner or President Information:**

Owner/President Full Name: <b>Melissa Zumwalt</b>	Owner/President Cell Phone: <b>918-798-2322</b>
Is the owner a member of a federally recognized tribe? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	If yes, Name of Tribe:
Tribal Registration Number (if applicable):	Owner Date of Birth: <b>11-30-1975</b>
If using Federal EIN on W-9 Form, please list here: <b>73-0773051</b>	If using Social Security Number on W-9 Form, please list here: _____

**CHILD CARE AUTHORIZATION APPLICATION**  
(Licensed Center or Home)

Please provide driving directions to the child care facility/home:

- from US 169 - northbound  
 - exit on 86th St. & head East  
 - turn RIGHT at the light @ 129th E. Ave.  
 - go about 1/4 mile & the LCC will be on your left

1. Provider understands that as a contracted child care provider, they are not an employee of Cherokee Nation.
2. Provider is an independent contractor and will be responsible for all applicable state and federal income tax and obligations related to payments received from the Cherokee Nation under the terms of this agreement.
3. Provider understands they are not eligible for any federal, social security, state workman's compensation or unemployment insurance benefits from the Cherokee Nation by virtue of payment received as a child care provider.
4. Provider acknowledges the receipt of a copy of the requirements for contracted licensed/unlicensed child care providers. Provider agrees that if contracted, it is the provider's responsibility to follow these requirements at all times and abide to any and all terms of this agreement.
5. Provider certifies the above information is correct to the best of their knowledge and certify their relationship as indicated. Provider understands that any false statements made on this form and/or in any other written statement, declaration, and/or background check request submitted therewith may result in prosecution for fraud or denial of contract.

Director Signature (if applicable)	Director Name (printed)	Date Signed
	Melissa Zumwalt	4-22-26
Owner/President Signature	Owner/President Name (printed)	Date Signed

**Office Use Only**

LCW:	NVD:	Date App Received:
Date Orientation Complete:	DHS CW:	Contract Start Date:
Reviewed by:	<input type="checkbox"/> Approved <input type="checkbox"/> Denied Reason for Denial:	



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### **DECLARATION FOR CHILD CARE PROVIDERS**

The Cherokee Nation Child Care Licensing Program requires all providers to sign a declaration before providing child care services to children and youth.

This declaration shall include all prior criminal convictions/court actions related to:

1. Child sexual abuse and their disposition,
2. Other forms of child care abuse and/or neglect,
3. The commission of felonies,
4. Drugs and alcohol,
5. Removing children from your home,
6. And/or child abuse, sexual offenses or violent felonies for which the record has been expunged, pardoned, or set aside under federal, state, or tribal law.

**This declaration may exclude:**

- Other offenses not related to child abuse and/or child sexual abuse or violent felonies committed before the prospective provider's 18<sup>th</sup> birthday, which was adjudicated in a juvenile court or under a youthful offender law.
- Other convictions not mentioned above for which the record has been expunged under federal, tribal or state law.
- Any convictions set aside under the federal youth corrections act or similar authority.

Please check the applicable statement below regarding the above criminal convictions/court actions.

**I have not** been convicted or involved in a court action that involves one or more of the six types of actions/offenses listed above.

**I have** been convicted or involved in a court action that involves one or more of the six types of actions/offenses listed above. **If you have been convicted or involved in a court action listed above, please attach information detailing the offense(s) or action, the date(s) of the conviction or action, and other relevant information.**

*Melissa Zumwalt*      Melissa Zumwalt      4/22/26  
Provider/Owner Signature      Provider/Owner Name (printed)      Date Signed



# Cherokee Nation Substitute Form W-9

## Request for Taxpayer Identification Number and Certification

NOTE: Your United States TAXPAYER IDENTIFICATION NUMBER MUST be provided regardless of your tax status. Name must be the same as that filed with the Internal Revenue Service (IRS) or the Social Security Administration (SSA), as applicable. Failure to return this form in a timely manner will delay the order and/or payment. The following information needs to be completed and returned to your contact person at Cherokee Nation.

PRINT OR TYPE - ALL FIELDS MUST BE COMPLETED

<b>1. LEGAL NAME</b> (As entered with IRS or SSA) If Sole Proprietorship, enter your LAST, FIRST, MI <span style="font-size: 1.2em; color: blue;">Independent School District No. 11 of Tulsa County</span>														
<b>2. TRADE NAME</b> (If doing business as (D/B/A) or business name of Sole Proprietorship) <span style="font-size: 1.2em; color: blue;">OWASSO Public Schools</span>	<b>3. Exemptions</b> (Codes apply only to certain entities; not individuals) Exempt Payee code (if any) <span style="font-size: 1.2em; color: blue;">3</span> Exemption FATCA reporting Code (if any) <span style="font-size: 1.2em; color: blue;">C</span> <small>(Applies to accounts maintained outside the U.S.)</small>													
<b>4. PRIMARY ADDRESS</b> (Physical Address) Number and street <span style="font-size: 1.2em; color: blue;">1501 N. Ash St.</span> City, State, Zip + 4 <span style="font-size: 1.2em; color: blue;">OWASSO, OK 74055</span>	<b>6. Vendor Entity Type</b> (Select only one box) <table style="width:100%; border: none;"> <tr> <td><input type="checkbox"/> Individual</td> <td><input type="checkbox"/> Corporation</td> </tr> <tr> <td><input type="checkbox"/> Sole Proprietor</td> <td><input type="checkbox"/> Limited Liability Corporation</td> </tr> <tr> <td><input type="checkbox"/> Partnership</td> <td><input type="checkbox"/> Professional Corporation</td> </tr> <tr> <td><input type="checkbox"/> Limited Liability Partnership</td> <td><input type="checkbox"/> Disregarded Entity</td> </tr> <tr> <td><input type="checkbox"/> Non-Profit</td> <td><input checked="" type="checkbox"/> Other</td> </tr> <tr> <td><input type="checkbox"/> Government</td> <td></td> </tr> </table>		<input type="checkbox"/> Individual	<input type="checkbox"/> Corporation	<input type="checkbox"/> Sole Proprietor	<input type="checkbox"/> Limited Liability Corporation	<input type="checkbox"/> Partnership	<input type="checkbox"/> Professional Corporation	<input type="checkbox"/> Limited Liability Partnership	<input type="checkbox"/> Disregarded Entity	<input type="checkbox"/> Non-Profit	<input checked="" type="checkbox"/> Other	<input type="checkbox"/> Government	
<input type="checkbox"/> Individual	<input type="checkbox"/> Corporation													
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<input type="checkbox"/> Non-Profit	<input checked="" type="checkbox"/> Other													
<input type="checkbox"/> Government														
<b>5. REMIT ADDRESS</b> (Mailing Address if different from above) PO Box or number and street City, State, Zip + 4	<b>8. Minority Certification</b> (Select all that apply and attach copy of certification) <table style="width:100%; border: none;"> <tr> <td><input type="checkbox"/> Certified Indian Owned (Tribe)</td> <td><input type="checkbox"/> Female Owned</td> </tr> <tr> <td><input type="checkbox"/> Certified Major Cherokee Employer</td> <td><input type="checkbox"/> Other Minority Owned</td> </tr> <tr> <td><input type="checkbox"/> Small Disadvantage</td> <td><input checked="" type="checkbox"/> None Apply</td> </tr> <tr> <td><input type="checkbox"/> TERO Certified</td> <td></td> </tr> </table>		<input type="checkbox"/> Certified Indian Owned (Tribe)	<input type="checkbox"/> Female Owned	<input type="checkbox"/> Certified Major Cherokee Employer	<input type="checkbox"/> Other Minority Owned	<input type="checkbox"/> Small Disadvantage	<input checked="" type="checkbox"/> None Apply	<input type="checkbox"/> TERO Certified					
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<input type="checkbox"/> Small Disadvantage	<input checked="" type="checkbox"/> None Apply													
<input type="checkbox"/> TERO Certified														
<b>7. CONTACT INFORMATION</b> Email Address: <span style="font-size: 1.2em; color: blue;">phillip.storm@owassops.org</span> Phone Number: <span style="font-size: 1.2em; color: blue;">918-272-5367</span> Fax Number: Contact Name: <span style="font-size: 1.2em; color: blue;">Phillip Storm</span> Contact Title: <span style="font-size: 1.2em; color: blue;">CFO</span>														
<b>9. TAXPAYER IDENTIFICATION NUMBER (TIN)</b> Federal Employer Identification No. (FEIN) <span style="font-size: 1.2em; color: blue;">73-0773051</span> OR Social Security Number (SSN)	<b>10. Purpose for W-9</b> <table style="width:100%; border: none;"> <tr> <td><input type="checkbox"/> Providing Goods</td> <td><input checked="" type="checkbox"/> Receiving CN Program Assistance</td> </tr> <tr> <td><input type="checkbox"/> Providing Services</td> <td><input type="checkbox"/> Expense Reimbursement</td> </tr> <tr> <td><input type="checkbox"/> Providing Goods and Services</td> <td></td> </tr> </table>		<input type="checkbox"/> Providing Goods	<input checked="" type="checkbox"/> Receiving CN Program Assistance	<input type="checkbox"/> Providing Services	<input type="checkbox"/> Expense Reimbursement	<input type="checkbox"/> Providing Goods and Services							
<input type="checkbox"/> Providing Goods	<input checked="" type="checkbox"/> Receiving CN Program Assistance													
<input type="checkbox"/> Providing Services	<input type="checkbox"/> Expense Reimbursement													
<input type="checkbox"/> Providing Goods and Services														
<b>CERTIFICATION:</b> Under penalties of perjury, I certify that: 1. The number shown on this form is my correct taxpayer identification number and that the information I provided is correct and complete; and 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and 3. I am a U.S. citizen or other U.S. person (defined in instructions); and 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.  <b>Certification instructions.</b> You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.														
Signature Title <span style="font-size: 1.2em; color: blue;">CFO</span> Date <span style="font-size: 1.2em; color: blue;">4/22/2026</span> <small>Please Print</small>														
<b>FOR CN PROGRAM USE ONLY</b>	<b>FOR AP USE ONLY</b> DATE _____ VENDOR NUMBER _____ VENDOR <input type="checkbox"/> Addition <input type="checkbox"/> Change 1099 <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>FOR FR USE ONLY</b>												



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918-458-7616 Main Fax  
918-458-4446 Subsidy Fax

Direct Deposit ACH Application

Please Check One:  New ACH Application  Change of Financial Institution  
 Change Bank Account Number  Terminate ACH Agreement

**Child Care Provider Information**

Printed Legal Name on Bank Account: Independent School District No. 11  
Trade Name DBA (if not legal name): Owasso Public Schools  
SSN or EIN (Tax ID Number): 73-0773051 Phone Number: 918-272-5367  
Mailing Address: 1501 N. Ash St.  
City, State, Zip: Owasso OK 74055  
Email Address for Payment Notification (Required): \_\_\_\_\_

**Financial Institution Information**

Name of Financial Institution: RCB Bank  
Financial Institution Address (main branch): 11633 E 86<sup>th</sup> St. N.  
Financial Institution City, State, Zip: Owasso OK 74055  
Account Number: 00000004800  
Routing Number: 103112594  
David Goff 11/13/25  
Authorized Signature on Bank Account Date

Child Care Provider must attach a notarized letter on financial institution letterhead that includes the following items below. The letter must be signed and notarized by two separate individuals. Original Documents must be mailed or dropped off at the Tahlequah Child Care office.

- account name
- account number
- routing transit number
- account type, checking or saving

Phone app cards may be accepted. The Child Care Provider must show an authorized Cherokee Nation Child Care employee the account name, account number, routing number and whether the account is checking or savings using their phone, tablet or computer. The ACH application must be notarized by the Cherokee Nation employee after verifying account information is accurate.

**Cherokee Nation Office Use ONLY**

Account verified by (print name): \_\_\_\_\_  
Account verified by (signature): \_\_\_\_\_ Date verified: \_\_\_\_\_  
Name of Bank Employee that Verified Account: \_\_\_\_\_

# RCB BANK

*That's my bank!*

11/13/2025

Independent School District No. 11  
1501 N Ash St  
Owasso, OK 74055

To Whom It May Concern:

This letter is in reference to your request for account confirmation from RCB Bank. The current account information is as follows:

Name: Independent School District No. 11  
Account Number: 00000004800  
Routing Number: 103112594

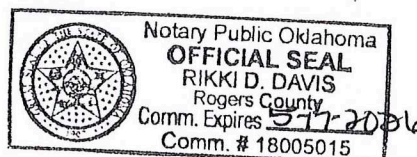
Account Type: Checking

Thank you for choosing RCB Bank.  
Please contact me if you have any questions or concerns.

Sincerely,



Paige Wooden  
Customer Service Representative  
RCB Bank  
Office: 918.724.1414  
Fax: 918.724.1414



State of Oklahoma  
Department of Human Services

# LICENSE

OWASSO 6TH GRADE CENTER-SPARK

8101 N 129th E Ave

OWASSO, OK 74055

OWNER: INDEPENDENT SCHOOL DISTRICT NO. 11

is hereby issued a license to operate a

CHILD CARE PROGRAM - Out of School Time

under provisions of the Oklahoma Child Care Facilities Licensing Act, as amended, Title 10 Oklahoma Statutes Annotated Sections 401, et seq.

Total Capacity 60

License No. K830056546 Issued 02/29/2024

Meets criteria for

Three Stars ★★ Effective Date: 4/24/2024

*Jaesta Daniels*

Director of Child Care Services



  
OKLAHOMA  
Human Services



GWYB DBP  
**CHEROKEE NATION®**  
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P.O. Box 948  
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(918) 453-5300 Main Phone  
(918) 458-7616 Main Fax  
(918) 458-4446 Subsidy Fax

**CHILD CARE AUTHORIZATION APPLICATION**  
(Licensed Center or Home)

**Facility Information:**

CN ID (office use only):

Facility or Provider Name: <b>Ator Elementary - SPARK</b>		
Email: <b>melissa.zumwalt@owasso.org</b>		
Business Phone: <b>918-274-1901</b>	Cell Phone:	
Physical Street Address: <b>1500 N. Agn St.</b>	City, State, Zip: <b>OWASSO, OK 74055</b>	
Mailing Address (if different from above): <b>1501 N. Agn St.</b>	City, State, Zip: <b>OWASSO, OK 74055</b>	
OKDHS License Number: <b>K8-30056537</b>	Licensed Capacity: <b>50</b>	
OKDHS Licensing Caseworker Name:	County: <b>TULSA</b>	
Type of Organization: <input type="checkbox"/> Individual/Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation/Inc. <input type="checkbox"/> LLC-Limited Liability Company <input checked="" type="checkbox"/> Public School <input type="checkbox"/> Tribal <input type="checkbox"/> Other: _____		
Type of Facility: <input type="checkbox"/> Child Care Center <input type="checkbox"/> Large Family Child Care Home <input type="checkbox"/> Small Family Child Care Home <input checked="" type="checkbox"/> Before & After Care/Public School (operates year-round: <input type="checkbox"/> yes <input checked="" type="checkbox"/> no)		
Star Status (Centers must be a minimum of a Two Star to contract with Cherokee Nation for services): <input type="checkbox"/> One Star <input type="checkbox"/> Two Star <input checked="" type="checkbox"/> Three Star <input type="checkbox"/> Four Star <input type="checkbox"/> Five Star		
Ages of Children Accepted for Care: <b>4 yrs - 13 yrs</b>	Days of Operation: <b>Mon - Fri</b>	Hours of Operation: <b>7-8:45 AM; 3:45-6pm</b>
Director Full Name (if applicable): <b>Melissa Zumwalt</b>	Director Cell Phone: <b>918-798-2322</b>	

**Owner or President Information:**


Owner/President Full Name: <b>Melissa Zumwalt</b>	Owner/President Cell Phone: <b>918-798-2322</b>
Is the owner a member of a federally recognized tribe? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	If yes, Name of Tribe:
Tribal Registration Number (if applicable):	Owner Date of Birth: <b>11-30-1975</b>
If using Federal EIN on W-9 Form, please list here: <b>73-0773051</b>	If using Social Security Number on W-9 Form, please list here: _____

**CHILD CARE AUTHORIZATION APPLICATION**  
(Licensed Center or Home)

Please provide driving directions to the child care facility/home:

- from Hwy 169 N bound  
 - exit on 86th Street  
 - head west on 86th Street  
 - turn RIGHT on Main Street  
 - the road will curve to the right & turn into N Ash St.  
 - Ato Elementary will be on your left

1. Provider understands that as a contracted child care provider, they are not an employee of Cherokee Nation.
2. Provider is an independent contractor and will be responsible for all applicable state and federal income tax and obligations related to payments received from the Cherokee Nation under the terms of this agreement.
3. Provider understands they are not eligible for any federal, social security, state workman's compensation or unemployment insurance benefits from the Cherokee Nation by virtue of payment received as a child care provider.
4. Provider acknowledges the receipt of a copy of the requirements for contracted licensed/unlicensed child care providers. Provider agrees that if contracted, it is the provider's responsibility to follow these requirements at all times and abide to any and all terms of this agreement.
5. Provider certifies the above information is correct to the best of their knowledge and certify their relationship as indicated. Provider understands that any false statements made on this form and/or in any other written statement, declaration, and/or background check request submitted therewith may result in prosecution for fraud or denial of contract.

Director Signature (if applicable)	Director Name (printed)	Date Signed
	Melissa Zumwalt	4/22/26
Owner/President Signature	Owner/President Name (printed)	Date Signed

**Office Use Only**

LCW:	NVD:	Date App Received:
Date Orientation Complete:	DHS CW:	Contract Start Date:
Reviewed by:	<input type="checkbox"/> Approved <input type="checkbox"/> Denied Reason for Denial:	



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### **DECLARATION FOR CHILD CARE PROVIDERS**

The Cherokee Nation Child Care Licensing Program requires all providers to sign a declaration before providing child care services to children and youth.

This declaration shall include all prior criminal convictions/court actions related to:

1. Child sexual abuse and their disposition,
2. Other forms of child care abuse and/or neglect,
3. The commission of felonies,
4. Drugs and alcohol,
5. Removing children from your home,
6. And/or child abuse, sexual offenses or violent felonies for which the record has been expunged, pardoned, or set aside under federal, state, or tribal law.

**This declaration may exclude:**

- Other offenses not related to child abuse and/or child sexual abuse or violent felonies committed before the prospective provider's 18<sup>th</sup> birthday, which was adjudicated in a juvenile court or under a youthful offender law.
- Other convictions not mentioned above for which the record has been expunged under federal, tribal or state law.
- Any convictions set aside under the federal youth corrections act or similar authority.

Please check the applicable statement below regarding the above criminal convictions/court actions.

**I have not** been convicted or involved in a court action that involves one or more of the six types of actions/offenses listed above.

**I have** been convicted or involved in a court action that involves one or more of the six types of actions/offenses listed above. **If you have been convicted or involved in a court action listed above, please attach information detailing the offense(s) or action, the date(s) of the conviction or action, and other relevant information.**

Melissa Zumwalt      Melissa Zumwalt      4/22/26  
Provider/Owner Signature      Provider/Owner Name (printed)      Date Signed



# Cherokee Nation Substitute Form W-9

## Request for Taxpayer Identification Number and Certification

NOTE: Your United States TAXPAYER IDENTIFICATION NUMBER MUST be provided regardless of your tax status. Name must be the same as that filed with the Internal Revenue Service (IRS) or the Social Security Administration (SSA), as applicable. Failure to return this form in a timely manner will delay the order and or payment. The following information needs to be completed and returned to your contact person at Cherokee Nation.

PRINT OR TYPE – ALL FIELDS MUST BE COMPLETED

<b>1. LEGAL NAME</b> (As entered with IRS or SSA) If Sole Proprietorship, enter your LAST, FIRST, MI <u>Independent School District No. 11 of Tulsa County</u>	
<b>2. TRADE NAME</b> (If doing business as (D/B/A) or business name of Sole Proprietorship) <u>Owasso Public Schools</u>	<b>3. Exemptions</b> (Codes apply only to certain entities; not individuals) Exempt Payee code (if any) <u>3</u> Exemption FATCA reporting Code (if any) <u>C</u> (Applies to accounts maintained outside the U.S.)
<b>4. PRIMARY ADDRESS</b> (Physical Address) Number and street <u>1501 N. Ash St.</u> City, State, Zip + 4 <u>DWASSO, OK 74055</u>	<b>6. Vendor Entity Type</b> (Select only one box) <input type="checkbox"/> Individual <input type="checkbox"/> Corporation <input type="checkbox"/> Sole Proprietor <input type="checkbox"/> Limited Liability Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Professional Corporation <input type="checkbox"/> Limited Liability Partnership <input type="checkbox"/> Disregarded Entity <input type="checkbox"/> Non-Profit <input checked="" type="checkbox"/> Other <input type="checkbox"/> Government
<b>5. REMIT ADDRESS</b> (Mailing Address if different from above) PO Box or number and street City, State, Zip + 4	<b>8. Minority Certification</b> (Select all that apply and attach copy of certification) <input type="checkbox"/> Certified Indian Owned (Tribe) <input type="checkbox"/> Female Owned <input type="checkbox"/> Certified Major Cherokee Employer <input type="checkbox"/> Other Minority Owned <input type="checkbox"/> Small Disadvantage <input checked="" type="checkbox"/> None Apply <input type="checkbox"/> TERO Certified
<b>7. CONTACT INFORMATION</b> Email Address: <u>phillip.storm@owassops.org</u> Phone Number: <u>918-272-5367</u> Fax Number: Contact Name: <u>Phillip Storm</u> Contact Title: <u>CFO</u>	<b>10. Purpose for W-9</b> <input type="checkbox"/> Providing Goods <input checked="" type="checkbox"/> Receiving CN Program Assistance <input type="checkbox"/> Providing Services <input type="checkbox"/> Expense Reimbursement <input type="checkbox"/> Providing Goods and Services
<b>9. TAXPAYER IDENTIFICATION NUMBER (TIN)</b> Federal Employer Identification No. (FEIN) <u>73-0773051</u> OR Social Security Number (SSN)	

**CERTIFICATION:** Under penalties of perjury, I certify that

- The number shown on this form is my correct taxpayer identification number and that the information I provided is correct and complete; and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined in instructions); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

Signature   
Title CFO  
Please Print

Date 4/22/2026

<b>FOR CN PROGRAM USE ONLY</b>	<b>FOR AP USE ONLY</b>	<b>FOR FR USE ONLY</b>
	DATE _____ VENDOR NUMBER _____ VENDOR <input type="checkbox"/> Addition <input type="checkbox"/> Change 1099 <input type="checkbox"/> Yes <input type="checkbox"/> No	



GWVJ DJF

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918-458-4446 Subsidy Fax

Direct Deposit ACH Application

Please Check One:  New ACH Application  Change of Financial Institution  
 Change Bank Account Number  Terminate ACH Agreement

Child Care Provider Information

Printed Legal Name on Bank Account: Independent School District No. 11  
Trade Name DBA (if not legal name): Owasso Public Schools  
SSN or EIN (Tax ID Number): 73-0773051 Phone Number: 918-272-5367  
Mailing Address: 1501 N. Ash St.  
City, State, Zip: Owasso OK 74055  
Email Address for Payment Notification (Required): \_\_\_\_\_

Financial Institution Information

Name of Financial Institution: RCB Bank  
Financial Institution Address (main branch): 11633 E 86<sup>th</sup> St. N.  
Financial Institution City, State, Zip: Owasso OK 74055  
Account Number: 00000004800  
Routing Number: 103112594  
Loayd Goff 11/13/25  
Authorized Signature on Bank Account Date

Child Care Provider must attach a notarized letter on financial institution letterhead that includes the following items below. The letter must be signed and notarized by two separate individuals. Original Documents must be mailed or dropped off at the Tahlequah Child Care office.

- account name
- account number
- routing transit number
- account type, checking or saving

Phone app works must be accepted. The Child Care Provider must show or authorize Cherokee Nation Child Care employee the account name, account number, routing number and whether the account is checking or saving using their phone, tablet or computer. The ACH application must be notarized by the Cherokee Nation employee after verifying account information is accurate.

**Cherokee Nation Office Use ONLY**

Account verified by (print name): \_\_\_\_\_  
Account verified by (signature): \_\_\_\_\_ Date verified: \_\_\_\_\_  
Name of Bank Employee that Verified Account: \_\_\_\_\_



*That's my bank!*

11/13/2025

Independent School District No. 11  
1501 N Ash St  
Owasso, OK 74055

To Whom It May Concern:

This letter is in reference to your request for account confirmation from RCB Bank. The current account information is as follows:

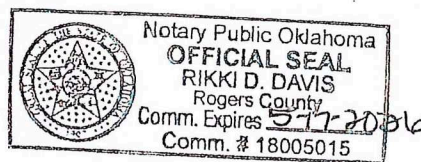
Name: Independent School District No. 11  
Account Number: 00000004800  
Routing Number: 103112594

Account Type: Checking

Thank you for choosing RCB Bank.  
Please contact me if you have any questions or concerns.

Sincerely,

Paige Wooden  
Customer Service Representative  
RCB Bank  
Office: 918.724.1414  
Fax: 918.724.1414



State of Oklahoma  
Department of Human Services

# LICENSE

ATOR ELEMENTARY-SPARK

1500 N Ash St

OWASSO , OK 74055

OWNER: INDEPENDENT SCHOOL DISTRICT NO. 11

is hereby issued a license to operate a

CHILD CARE PROGRAM - Out of School Time

under provisions of the Oklahoma Child Care Facilities Licensing Act, as amended, Title 10 Oklahoma Statutes Annotated Sections 401, et seq.

Total Capacity 50

License No. K830056537 Issued 01/29/2024

Meets criteria for

Three Stars ★★★ Effective Date: 4/4/2024



Director of Child Care Services



OKLAHOMA  
Human Services



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(918) 458-4446 Subsidy Fax

**CHILD CARE AUTHORIZATION APPLICATION**  
(Licensed Center or Home)

**Facility Information:**

CN ID (office use only):

Facility or Provider Name: <b>Bailey Elementary-SPARK</b>		
Email: <b>melissa.zumwalt@owassops.org</b>		
Business Phone: <b>918-274-1901</b>	Cell Phone:	
Physical Street Address: <b>10221 E. 96<sup>th</sup> St. N</b>	City, State, Zip: <b>OWASSO, OK 74055</b>	
Mailing Address (if different from above): <b>1501 N. Ash St.</b>	City, State, Zip: <b>OWASSO, OK 74055</b>	
OKDHS License Number: <b>K8-30056538</b>	Licensed Capacity: <b>50</b>	
OKDHS Licensing Caseworker Name:	County: <b>TULSA</b>	
Type of Organization: <input type="checkbox"/> Individual/Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation/Inc. <input type="checkbox"/> LLC-Limited Liability Company <input checked="" type="checkbox"/> Public School <input type="checkbox"/> Tribal <input type="checkbox"/> Other: _____		
Type of Facility: <input type="checkbox"/> Child Care Center <input type="checkbox"/> Large Family Child Care Home <input type="checkbox"/> Small Family Child Care Home <input checked="" type="checkbox"/> Before & After Care/Public School (operates year-round: <input type="checkbox"/> yes <input checked="" type="checkbox"/> no)		
Star Status (Centers must be a minimum of a Two Star to contract with Cherokee Nation for services): <input type="checkbox"/> One Star <input type="checkbox"/> Two Star <input checked="" type="checkbox"/> Three Star <input type="checkbox"/> Four Star <input type="checkbox"/> Five Star		
Ages of Children Accepted for Care: <b>4-13 years</b>	Days of Operation: <b>Mon-Fri</b>	Hours of Operation: <b>7-8:45 AM ; 3:45-6 PM</b>
Director Full Name (if applicable): <b>Melissa Zumwalt</b>	Director Cell Phone: <b>918-798-2322</b>	

**Owner or President Information:**

Owner/President Full Name: <b>Melissa Zumwalt</b>	Owner/President Cell Phone: <b>918-798-2322</b>
Is the owner a member of a federally recognized tribe? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	If yes, Name of Tribe:
Tribal Registration Number (if applicable):	Owner Date of Birth: <b>11-30-1975</b>
If using Federal EIN on W-9 Form, please list here: <b>73-0773051</b>	If using Social Security Number on W-9 Form, please list here: _____

**CHILD CARE AUTHORIZATION APPLICATION**  
(Licensed Center or Home)

Please provide driving directions to the child care facility/home:

- From Hwy 169 - northbound  
 - exit on 96th & head west past Garnett  
 - continue on 96th for approx. 1/2 mile  
 - Bailey Elementary will be on the right

1. Provider understands that as a contracted child care provider, they are not an employee of Cherokee Nation.
2. Provider is an independent contractor and will be responsible for all applicable state and federal income tax and obligations related to payments received from the Cherokee Nation under the terms of this agreement.
3. Provider understands they are not eligible for any federal, social security, state workman's compensation or unemployment insurance benefits from the Cherokee Nation by virtue of payment received as a child care provider.
4. Provider acknowledges the receipt of a copy of the requirements for contracted licensed/unlicensed child care providers. Provider agrees that if contracted, it is the provider's responsibility to follow these requirements at all times and abide to any and all terms of this agreement.
5. Provider certifies the above information is correct to the best of their knowledge and certify their relationship as indicated. Provider understands that any false statements made on this form and/or in any other written statement, declaration, and/or background check request submitted therewith may result in prosecution for fraud or denial of contract.

Director Signature (if applicable)

Director Name (printed)

Date Signed

*Melissa Zumwalt*      Melissa Zumwalt      4-22-2026  
 Owner/President Signature      Owner/President Name (printed)      Date Signed

**Office Use Only**

LCW:	NVD:	Date App Received:
Date Orientation Complete:	DHS CW:	Contract Start Date:
Reviewed by:	<input type="checkbox"/> Approved <input type="checkbox"/> Denied Reason for Denial:	



## Cherokee Nation Substitute Form W-9 Request for Taxpayer Identification Number and Certification

NOTE: Your United States TAXPAYER IDENTIFICATION NUMBER MUST be provided regardless of your tax status. Name must be the same as that filed with the Internal Revenue Service (IRS) or the Social Security Administration (SSA), as applicable. Failure to return this form in a timely manner will delay the order and/or payment. The following information needs to be completed and returned to your contact person at Cherokee Nation.

PRINT OR TYPE – ALL FIELDS MUST BE COMPLETED

<b>1. LEGAL NAME</b> (As entered with IRS or SSA) If Sole Proprietorship, enter your LAST, FIRST, MI <span style="font-size: 1.2em; font-family: cursive;">Independent School District No. 11 of Tulsa County</span>		
<b>2. TRADE NAME</b> (If doing business as (D/B/A) or business name of Sole Proprietorship) <span style="font-size: 1.2em; font-family: cursive;">OWASSO Public Schools</span>	<b>3. Exemptions</b> (Codes apply only to certain entities; not individuals) Exempt Payee code (if any) <u>3</u> Exemption FATCA reporting Code (if any) <u>C</u> <small>(Applies to accounts maintained outside the U.S.)</small>	
<b>4. PRIMARY ADDRESS</b> (Physical Address) Number and street <span style="font-size: 1.2em; font-family: cursive;">1501 N. Ash St.</span> City, State, Zip + 4 <span style="font-size: 1.2em; font-family: cursive;">DWASSO, OK 74055</span>	<b>6. Vendor Entity Type</b> (Select only one box) <input type="checkbox"/> Individual <span style="float: right;"><input type="checkbox"/> Corporation</span> <input type="checkbox"/> Sole Proprietor <span style="float: right;"><input type="checkbox"/> Limited Liability Corporation</span> <input type="checkbox"/> Partnership <span style="float: right;"><input type="checkbox"/> Professional Corporation</span> <input type="checkbox"/> Limited Liability Partnership <span style="float: right;"><input type="checkbox"/> Disregarded Entity</span> <input type="checkbox"/> Non-Profit <span style="float: right;"><input checked="" type="checkbox"/> Other</span> <input type="checkbox"/> Government	
<b>5. REMIT ADDRESS</b> (Mailing Address if different from above) PO Box or number and street City, State, Zip + 4	<b>8. Minority Certification</b> (Select all that apply and attach copy of certification) <input type="checkbox"/> Certified Indian Owned (Tribe) <span style="float: right;"><input type="checkbox"/> Female Owned</span> <input type="checkbox"/> Certified Major Cherokee Employer <span style="float: right;"><input type="checkbox"/> Other Minority Owned</span> <input type="checkbox"/> Small Disadvantage <span style="float: right;"><input checked="" type="checkbox"/> None Apply</span> <input type="checkbox"/> TERO Certified	
<b>7. CONTACT INFORMATION</b> Email Address: <span style="font-size: 1.2em; font-family: cursive;">phillip.storm@dwassops.org</span> Phone Number: <span style="font-size: 1.2em; font-family: cursive;">918-272-5367</span> Fax Number: Contact Name: <span style="font-size: 1.2em; font-family: cursive;">Phillip Storm</span> Contact Title: <span style="font-size: 1.2em; font-family: cursive;">CFO</span>		
<b>9. TAXPAYER IDENTIFICATION NUMBER (TIN)</b> Federal Employer Identification No. (FEIN) <span style="font-size: 1.2em; font-family: cursive;">73-0773051</span> OR Social Security Number (SSN)	<b>10. Purpose for W-9</b> <input type="checkbox"/> Providing Goods <span style="float: right;"><input checked="" type="checkbox"/> Receiving CN Program Assistance</span> <input type="checkbox"/> Providing Services <span style="float: right;"><input type="checkbox"/> Expense Reimbursement</span> <input type="checkbox"/> Providing Goods and Services	
<b>CERTIFICATION:</b> Under penalties of perjury, I certify that: 1. The number shown on this form is my correct taxpayer identification number and that the information I provided is correct and complete; and 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and 3. I am a U.S. citizen or other U.S. person (defined in instructions); and 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.  <b>Certification instructions.</b> You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.		
Signature Title <span style="font-size: 1.2em; font-family: cursive;">CFO</span> <span style="float: right;">Date <span style="font-size: 1.2em; font-family: cursive;">4/22/2026</span></span> <small>Please Print</small>		
<b>FOR CN PROGRAM USE ONLY</b>	<b>FOR AP USE ONLY</b> DATE _____ VENDOR NUMBER _____ VENDOR <input type="checkbox"/> Addition <input type="checkbox"/> Change 1099 <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>FOR FR USE ONLY</b>



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(918) 458-4446 Subsidy Fax

### DECLARATION FOR CHILD CARE PROVIDERS

The Cherokee Nation Child Care Licensing Program requires all providers to sign a declaration before providing child care services to children and youth.

This declaration shall include all prior criminal convictions/court actions related to:

1. Child sexual abuse and their disposition,
2. Other forms of child care abuse and/or neglect,
3. The commission of felonies,
4. Drugs and alcohol,
5. Removing children from your home,
6. And/or child abuse, sexual offenses or violent felonies for which the record has been expunged, pardoned, or set aside under federal, state, or tribal law.

**This declaration may exclude:**

- Other offenses not related to child abuse and/or child sexual abuse or violent felonies committed before the prospective provider's 18<sup>th</sup> birthday, which was adjudicated in a juvenile court or under a youthful offender law.
- Other convictions not mentioned above for which the record has been expunged under federal, tribal or state law.
- Any convictions set aside under the federal youth corrections act or similar authority.

Please check the applicable statement below regarding the above criminal convictions/court actions.

**I have not** been convicted or involved in a court action that involves one or more of the six types of actions/offenses listed above.

**I have** been convicted or involved in a court action that involves one or more of the six types of actions/offenses listed above. **If you have been convicted or involved in a court action listed above, please attach information detailing the offense(s) or action, the date(s) of the conviction or action, and other relevant information.**

Melissa Zumwalt      Melissa Zumwalt      4-22-26  
Provider/Owner Signature      Provider/Owner Name (printed)      Date Signed



GWJ3 D3F  
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918-458-7616 Main Fax  
918-458-4446 Subsidy Fax

Direct Deposit ACH Application

Please Check One:  New ACH Application  Change of Financial Institution  
 Change Bank Account Number  Terminate ACH Agreement

**Child Care Provider Information**

Printed Legal Name on Bank Account: Independent School District No. 11  
Trade Name DBA (if not legal name): Owasso Public Schools  
SSN or EIN (Tax ID Number): 73-0773051 Phone Number: 918-272-5367  
Mailing Address: 1501 N. Ash St.  
City, State, Zip: Owasso OK 74055  
Email Address for Payment Notification (Required): \_\_\_\_\_

**Financial Institution Information**

Name of Financial Institution: RCB Bank  
Financial Institution Address (main branch): 11633 E 86<sup>th</sup> St. N.  
Financial Institution City, State, Zip: Owasso OK 74055  
Account Number: 00000004800  
Routing Number: 103112594  
Lloyd Goff 11/13/25  
Authorized Signature on Bank Account Date

Child Care Provider must attach a notarized letter on financial institution letterhead that includes the following items below. The letter must be signed and notarized by two separate individuals. Original Documents must be mailed or dropped off at the Tahlequah Child Care office.

- account name
- account number
- routing/transit number
- account type, checking or saving

Please note that photos may be accepted. The Child Care Provider must be an authorized Cherokee Nation Child Care employee (the account name, account number, routing number and whether the account is checking or saving using their photo, initials or stamp). The ACH application must be notarized by the Cherokee Nation employee if the underlying account information is accurate.

**Cherokee Nation Office Use ONLY**

Account verified by (print name): \_\_\_\_\_  
Account verified by (signature): \_\_\_\_\_ Date verified: \_\_\_\_\_  
Name of Bank Employee that Verified Account: \_\_\_\_\_



That's my bank!

11/13/2025

Independent School District No. 11  
1501 N Ash St  
Owasso, OK 74055

To Whom It May Concern:

This letter is in reference to your request for account confirmation from RCB Bank. The current account information is as follows:

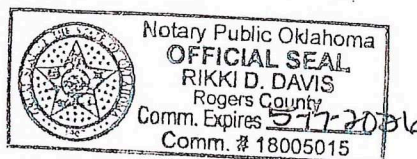
Name: Independent School District No. 11  
Account Number: 00000004800  
Routing Number: 103112594

Account Type: Checking

Thank you for choosing RCB Bank.  
Please contact me if you have any questions or concerns.

Sincerely,

Paige Wooden  
Customer Service Representative  
RCB Bank  
Office: 918.724.1414  
Fax: 918.724.1414



State of Oklahoma  
Department of Human Services

# LICENSE

BAILEY ELEMENTARY-SPARK

10221 E 96th St N

OWASSO , OK 74055

OWNER: INDEPENDENT SCHOOL DISTRICT NO. 11

is hereby issued a license to operate a

CHILD CARE PROGRAM - Out of School Time

under provisions of the Oklahoma Child Care Facilities Licensing Act, as amended, Title 10 Oklahoma Statutes Annotated Sections 401, et seq.

Total Capacity 50

License No. K830056538 Issued 02/29/2024

Meets criteria for

Three Stars ★★☆☆

Effective Date: 4/24/2024

*Jaesha Edwards*

Director of Child Care Services



OKLAHOMA  
Human Services



GWYB DBP  
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 (918) 458-4446 Subsidy Fax

**CHILD CARE AUTHORIZATION APPLICATION**  
 (Licensed Center or Home)

**Facility Information:**

CN ID (office use only):

Facility or Provider Name: <b>Barnes Elementary - SPARK</b>	
Email: <b>melissa.zumwalt@owalggops.org</b>	
Business Phone: <b>918-274-1901</b>	Cell Phone:
Physical Street Address: <b>7809 E 76<sup>th</sup> St. N</b>	City, State, Zip: <b>DWASSO, OK 74055</b>
Mailing Address (if different from above): <b>1501 N Ash St.</b>	City, State, Zip: <b>DWASSO, OK 74055</b>
OKDHS License Number: <b>K8-830056539</b>	Licensed Capacity: <b>Tulsa</b>
OKDHS Licensing Caseworker Name:	County:
Type of Organization: <input type="checkbox"/> Individual/Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation/Inc. <input type="checkbox"/> LLC-Limited Liability Company <input checked="" type="checkbox"/> Public School <input type="checkbox"/> Tribal <input type="checkbox"/> Other: _____	
Type of Facility: <input type="checkbox"/> Child Care Center <input type="checkbox"/> Large Family Child Care Home <input type="checkbox"/> Small Family Child Care Home <input checked="" type="checkbox"/> Before & After Care/Public School (operates year-round: <input type="checkbox"/> yes <input type="checkbox"/> no)	
Star Status (Centers must be a minimum of a Two Star to contract with Cherokee Nation for services): <input type="checkbox"/> One Star <input type="checkbox"/> Two Star <input checked="" type="checkbox"/> Three Star <input type="checkbox"/> Four Star <input type="checkbox"/> Five Star	
Ages of Children Accepted for Care: <b>4-13 years of age</b>	Days of Operation: <b>Mon-Fri</b>
Hours of Operation: <b>7-8:45 AM ; 3:45-6 PM</b>	
Director Full Name (if applicable): <b>Melissa Zumwalt</b>	Director Cell Phone: <b>918-798-2322</b>

**Owner or President Information:**

Owner/President Full Name: <b>Melissa Zumwalt</b>	Owner/President Cell Phone: <b>918-798-2322</b>
Is the owner a member of a federally recognized tribe? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	If yes, Name of Tribe:
Tribal Registration Number (if applicable):	Owner Date of Birth: <b>11-30-1975</b>
If using Federal EIN on W-9 Form, please list here: <b>73-0773051</b>	If using Social Security Number on W-9 Form, please list here: _____

**CHILD CARE AUTHORIZATION APPLICATION**  
(Licensed Center or Home)

Please provide driving directions to the child care facility/home:

- From Hwy 169 - northbound  
 - exit on 76th St. N & head west - past N. Memorial Dr. (approx. 2 miles)  
 - Barnes Elementary will be on your right

1. Provider understands that as a contracted child care provider, they are not an employee of Cherokee Nation.
2. Provider is an independent contractor and will be responsible for all applicable state and federal income tax and obligations related to payments received from the Cherokee Nation under the terms of this agreement.
3. Provider understands they are not eligible for any federal, social security, state workman's compensation or unemployment insurance benefits from the Cherokee Nation by virtue of payment received as a child care provider.
4. Provider acknowledges the receipt of a copy of the requirements for contracted licensed/unlicensed child care providers. Provider agrees that if contracted, it is the provider's responsibility to follow these requirements at all times and abide to any and all terms of this agreement.
5. Provider certifies the above information is correct to the best of their knowledge and certify their relationship as indicated. Provider understands that any false statements made on this form and/or in any other written statement, declaration, and/or background check request submitted therewith may result in prosecution for fraud or denial of contract.

Director Signature (if applicable)	Director Name (printed)	Date Signed
<i>Melissa Zumwalt</i>	Melissa Zumwalt	4/22/26
Owner/President Signature	Owner/President Name (printed)	Date Signed

**Office Use Only**

LCW:	NVD:	Date App Received:
Date Orientation Complete:	DHS CW:	Contract Start Date:
Reviewed by:	<input type="checkbox"/> Approved <input type="checkbox"/> Denied Reason for Denial:	



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(918) 458-7616 Main Fax  
(918) 458-4446 Subsidy Fax

### **DECLARATION FOR CHILD CARE PROVIDERS**

The Cherokee Nation Child Care Licensing Program requires all providers to sign a declaration before providing child care services to children and youth.

This declaration shall include all prior criminal convictions/court actions related to:

1. Child sexual abuse and their disposition,
2. Other forms of child care abuse and/or neglect,
3. The commission of felonies,
4. Drugs and alcohol,
5. Removing children from your home,
6. And/or child abuse, sexual offenses or violent felonies for which the record has been expunged, pardoned, or set aside under federal, state, or tribal law.

**This declaration may exclude:**

- Other offenses not related to child abuse and/or child sexual abuse or violent felonies committed before the prospective provider's 18<sup>th</sup> birthday, which was adjudicated in a juvenile court or under a youthful offender law.
- Other convictions not mentioned above for which the record has been expunged under federal, tribal or state law.
- Any convictions set aside under the federal youth corrections act or similar authority.

Please check the applicable statement below regarding the above criminal convictions/court actions.

I **have not** been convicted or involved in a court action that involves one or more of the six types of actions/offenses listed above.

I **have** been convicted or involved in a court action that involves one or more of the six types of actions/offenses listed above. **If you have been convicted or involved in a court action listed above, please attach information detailing the offense(s) or action, the date(s) of the conviction or action, and other relevant information.**

*Melissa Zumwalt*      Melissa Zumwalt      4/22/26  
Provider Owner Signature      Provider Owner Name (printed)      Date Signed



# Cherokee Nation Substitute Form W-9

## Request for Taxpayer Identification Number and Certification

NOTE: Your United States TAXPAYER IDENTIFICATION NUMBER MUST be provided regardless of your tax status. Name must be the same as that filed with the Internal Revenue Service (IRS) or the Social Security Administration (SSA), as applicable. Failure to return this form in a timely manner will delay the order and/or payment. The following information needs to be completed and returned to your contact person at Cherokee Nation

PRINT OR TYPE – ALL FIELDS MUST BE COMPLETED

<b>1. LEGAL NAME</b> (As entered with IRS or SSA) If Sole Proprietorship, enter your LAST, FIRST, MI <span style="font-size: 1.2em; color: blue;">Independent School District No. 11 of Tulsa County</span>		
<b>2. TRADE NAME</b> (If doing business as (D/B/A) or business name of Sole Proprietorship) <span style="font-size: 1.2em; color: blue;">Owasso Public Schools</span>	<b>3. Exemptions</b> (Codes apply only to certain entities; not individuals) Exempt Payee code (if any) <span style="font-size: 1.2em; color: blue;">3</span> Exemption FATCA reporting Code (if any) <span style="font-size: 1.2em; color: blue;">C</span> <small>(Applies to accounts maintained outside the U.S.)</small>	
<b>4. PRIMARY ADDRESS</b> (Physical Address) Number and street <span style="font-size: 1.2em; color: blue;">1501 N. Ash St.</span> City, State, Zip + 4 <span style="font-size: 1.2em; color: blue;">OWASSO, OK 74055</span>	<b>6. Vendor Entity Type</b> (Select only one box) <input type="checkbox"/> Individual <span style="float: right;"><input type="checkbox"/> Corporation</span> <input type="checkbox"/> Sole Proprietor <span style="float: right;"><input type="checkbox"/> Limited Liability Corporation</span> <input type="checkbox"/> Partnership <span style="float: right;"><input type="checkbox"/> Professional Corporation</span> <input type="checkbox"/> Limited Liability Partnership <span style="float: right;"><input type="checkbox"/> Disregarded Entity</span> <input type="checkbox"/> Non-Profit <span style="float: right;"><input checked="" type="checkbox"/> Other</span> <input type="checkbox"/> Government	
<b>5. REMIT ADDRESS</b> (Mailing Address if different from above) PO Box or number and street City, State, Zip + 4	<b>8. Minority Certification</b> (Select all that apply and attach copy of certification) <input type="checkbox"/> Certified Indian Owned (Tribe) <span style="float: right;"><input type="checkbox"/> Female Owned</span> <input type="checkbox"/> Certified Major Cherokee Employer <span style="float: right;"><input type="checkbox"/> Other Minority Owned</span> <input type="checkbox"/> Small Disadvantage <span style="float: right;"><input checked="" type="checkbox"/> None Apply</span> <input type="checkbox"/> TERO Certified	
<b>7. CONTACT INFORMATION</b> Email Address: <span style="font-size: 1.2em; color: blue;">phillip.storm@owassops.org</span> Phone Number: <span style="font-size: 1.2em; color: blue;">918-272-5367</span> Fax Number: Contact Name: <span style="font-size: 1.2em; color: blue;">Phillip Storm</span> Contact Title: <span style="font-size: 1.2em; color: blue;">CFO</span>	<b>10. Purpose for W-9</b> <input type="checkbox"/> Providing Goods <span style="float: right;"><input checked="" type="checkbox"/> Receiving CN Program Assistance</span> <input type="checkbox"/> Providing Services <span style="float: right;"><input type="checkbox"/> Expense Reimbursement</span> <input type="checkbox"/> Providing Goods and Services	
<b>9. TAXPAYER IDENTIFICATION NUMBER (TIN)</b> Federal Employer Identification No. (FEIN) <span style="font-size: 1.2em; color: blue;">73-0773051</span> OR Social Security Number (SSN)		
<b>CERTIFICATION:</b> Under penalties of perjury, I certify that: 1. The number shown on this form is my correct taxpayer identification number and that the information I provided is correct and complete; and 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and 3. I am a U.S. citizen or other U.S. person (defined in instructions); and 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.  <b>Certification instructions.</b> You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.		
Signature Title <span style="font-size: 1.2em; color: blue;">CFO</span> <span style="float: right;">Date <span style="font-size: 1.2em; color: blue;">4/22/2026</span></span> <small>Please Print</small>		
<b>FOR CN PROGRAM USE ONLY</b>	<b>FOR AP USE ONLY</b> DATE _____ VENDOR NUMBER _____ VENDOR <input type="checkbox"/> Addition <input type="checkbox"/> Change 1099 <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>FOR FR USE ONLY</b>



CWYJ DJF  
**CHEROKEE NATION**  
Child Care & Development

P.O. Box 948  
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918-453-5300 Main Phone  
918-458-7616 Main Fax  
918-458-4446 Subsidy Fax

Direct Deposit ACH Application

Please Check One:  New ACH Application  Change of Financial Institution  
 Change Bank Account Number  Terminate ACH Agreement

**Child Care Provider Information**

Printed Legal Name on Bank Account: Independent School District No. 11  
Trade Name DBA (if not legal name): Owasso Public Schools  
SSN or EIN (Tax ID Number): 73-0773051 Phone Number: 918-272-5367  
Mailing Address: 1501 N. Ash St.  
City, State, Zip: Owasso OK 74055  
Email Address for Payment Notification (Required): \_\_\_\_\_

**Financial Institution Information**

Name of Financial Institution: RCB Bank  
Financial Institution Address (main branch): 11633 E 86<sup>th</sup> St. N.  
Financial Institution City, State, Zip: Owasso OK 74055  
Account Number: 00000004800  
Routing Number: 103112594  
Joseph Goff 11/3/25  
Authorized Signature on Bank Account Date

Child Care Provider must attach a notarized letter on financial institution letterhead that includes the following items below. The letter must be signed and notarized by two separate individuals. Original Documents must be mailed or dropped off at the Tahlequah Child Care office.

- account name
- account number
- routing transit number
- account type: checking or saving

Please pay cards may be accepted. The Child Care Provider must give an authorized Cherokee Nation Child Care employee the account name, account number, routing number and whether the account is checking or savings using their phone, tablet or computer. The ACH application must be notarized by two Cherokee Nation employees after verifying account information is accurate.

**Cherokee Nation Office Use ONLY**

Account verified by (print name): \_\_\_\_\_  
Account verified by (signature): \_\_\_\_\_ Date verified: \_\_\_\_\_  
Name of Bank Employee that Verified Account: \_\_\_\_\_



*That's my bank!*

11/13/2025

Independent School District No. 11  
1501 N Ash St  
Owasso, OK 74055

To Whom It May Concern:

This letter is in reference to your request for account confirmation from RCB Bank. The current account information is as follows:

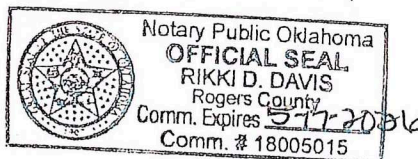
Name: Independent School District No. 11  
Account Number: 00000004800  
Routing Number: 103112594

Account Type: Checking

Thank you for choosing RCB Bank.  
Please contact me if you have any questions or concerns.

Sincerely,

Paige Wooden  
Customer Service Representative  
RCB Bank  
Office: 918.724.1414  
Fax: 918.724.1414



State of Oklahoma  
Department of Human Services

# LICENSE

BARNES ELEMENTARY-SPARK

7809 E 76th St N

OWASSO, OK 74055

OWNER: INDEPENDENT SCHOOL DISTRICT NO. 11

is hereby issued a license to operate a

CHILD CARE PROGRAM - Out of School Time

under provisions of the Oklahoma Child Care Facilities Licensing Act, as amended, Title 10 Oklahoma Statutes Annotated Sections 401, et seq.

Total Capacity 50

License No. K830056539 Issued 02/29/2024

Meets criteria for

Three Stars ★★ ★ Effective Date: 4/29/2024

*Jaesta Adams*

Director of Child Care Services



OKLAHOMA  
Human Services



GWYB DBP  
**CHEROKEE NATION®**  
Child Care & Development

P.O. Box 948  
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(918) 458-4446 Subsidy Fax

**CHILD CARE AUTHORIZATION APPLICATION**  
(Licensed Center or Home)

**Facility Information:**

CN ID (office use only):

Facility or Provider Name: <b>Hodson Elementary - SPARK</b>		
Email: <b>melissa.zumwalt@dwassops.org</b>		
Business Phone: <b>918-274-1901</b>	Cell Phone:	
Physical Street Address: <b>14500 E. 86<sup>th</sup> St. N</b>	City, State, Zip: <b>DWASSO, OK 74055</b>	
Mailing Address (if different from above): <b>1401 N Ash St.</b>	City, State, Zip: <b>DWASSO, OK 74055</b>	
OKDHS License Number: <b>KG-30056540</b>	Licensed Capacity: <b>60</b>	
OKDHS Licensing Caseworker Name:	County: <b>ROGERS</b>	
Type of Organization: <input type="checkbox"/> Individual/Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation/Inc. <input type="checkbox"/> LLC-Limited Liability Company <input checked="" type="checkbox"/> Public School <input type="checkbox"/> Tribal <input type="checkbox"/> Other: _____		
Type of Facility: <input type="checkbox"/> Child Care Center <input type="checkbox"/> Large Family Child Care Home <input type="checkbox"/> Small Family Child Care Home <input checked="" type="checkbox"/> Before & After Care/Public School (operates year-round: <input type="checkbox"/> yes <input type="checkbox"/> no)		
Star Status (Centers must be a minimum of a Two Star to contract with Cherokee Nation for services): <input type="checkbox"/> One Star <input type="checkbox"/> Two Star <input checked="" type="checkbox"/> Three Star <input type="checkbox"/> Four Star <input type="checkbox"/> Five Star		
Ages of Children Accepted for Care: <b>4-13 years of age</b>	Days of Operation: <b>Mon-Fri</b>	Hours of Operation: <b>7-8:45 AM ; 3:45 - 6:00 PM</b>
Director Full Name (if applicable): <b>Melissa Zumwalt</b>	Director Cell Phone: <b>918-798-2322</b>	

**Owner or President Information:**

Owner/President Full Name: <b>Melissa Zumwalt</b>	Owner/President Cell Phone: <b>918-798-2322</b>
Is the owner a member of a federally recognized tribe? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	If yes, Name of Tribe:
Tribal Registration Number (if applicable):	Owner Date of Birth: <b>11-30-75</b>
If using Federal EIN on W-9 Form, please list here: <b>73-0773051</b>	If using Social Security Number on W-9 Form, please list here: _____

**CHILD CARE AUTHORIZATION APPLICATION**  
(Licensed Center or Home)

Please provide driving directions to the child care facility/home:

- from Hwy 169 - northbound  
 - head East on 86<sup>th</sup> St. for 2.5 miles - past  
 145<sup>th</sup> E Ave  
 - Hodson will be on your right

1. Provider understands that as a contracted child care provider, they are not an employee of Cherokee Nation.
2. Provider is an independent contractor and will be responsible for all applicable state and federal income tax and obligations related to payments received from the Cherokee Nation under the terms of this agreement.
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Director Signature (if applicable)	Director Name (printed)	Date Signed
	Melissa Zumwalt	4/22/26
Owner/President Signature	Owner/President Name (printed)	Date Signed

**Office Use Only**

LCW:	NVD:	Date App Received:
Date Orientation Complete:	DHS CW:	Contract Start Date:
Reviewed by:	<input type="checkbox"/> Approved <input type="checkbox"/> Denied Reason for Denial:	



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### **DECLARATION FOR CHILD CARE PROVIDERS**

The Cherokee Nation Child Care Licensing Program requires all providers to sign a declaration before providing child care services to children and youth.

This declaration shall include all prior criminal convictions/court actions related to:

1. Child sexual abuse and their disposition,
2. Other forms of child care abuse and/or neglect,
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I **have not** been convicted or involved in a court action that involves one or more of the six types of actions/offenses listed above.

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*Melissa Zumwalt*      Melissa Zumwalt      4/22/26  
Provider/Owner Signature      Provider/Owner Name (printed)      Date Signed



## Cherokee Nation Substitute Form W-9

### Request for Taxpayer Identification Number and Certification

NOTE: Your United States TAXPAYER IDENTIFICATION NUMBER MUST be provided regardless of your tax status. Name must be the same as that filed with the Internal Revenue Service (IRS) or the Social Security Administration (SSA), as applicable. Failure to return this form in a timely manner will delay the order and/or payment. The following information needs to be completed and returned to your contact person at Cherokee Nation.

PRINT OR TYPE - ALL FIELDS MUST BE COMPLETED

<b>1. LEGAL NAME</b> (As entered with IRS or SSA) If Sole Proprietorship, enter your LAST, FIRST, MI <span style="font-size: 1.2em; color: blue;">Independent School District No. 11 of Tulsa County</span>														
<b>2. TRADE NAME</b> (If doing business as (D/B/A) or business name of Sole Proprietorship) <span style="font-size: 1.2em; color: blue;">OWASSO Public Schools</span>	<b>3. Exemptions</b> (Codes apply only to certain entities; not individuals) Exempt Payee code (if any) <span style="font-size: 1.2em; color: blue;">3</span> Exemption FATCA reporting Code (if any) <span style="font-size: 1.2em; color: blue;">C</span> <small>(Applies to accounts maintained outside the U.S.)</small>													
<b>4. PRIMARY ADDRESS</b> (Physical Address) Number and street <span style="font-size: 1.2em; color: blue;">1501 N. Ash St.</span> City, State, Zip + 4 <span style="font-size: 1.2em; color: blue;">OWASSO, OK 74055</span>	<b>6. Vendor Entity Type</b> (Select only one box) <table style="width: 100%; border: none;"> <tr> <td><input type="checkbox"/> Individual</td> <td><input type="checkbox"/> Corporation</td> </tr> <tr> <td><input type="checkbox"/> Sole Proprietor</td> <td><input type="checkbox"/> Limited Liability Corporation</td> </tr> <tr> <td><input type="checkbox"/> Partnership</td> <td><input type="checkbox"/> Professional Corporation</td> </tr> <tr> <td><input type="checkbox"/> Limited Liability Partnership</td> <td><input type="checkbox"/> Disregarded Entity</td> </tr> <tr> <td><input type="checkbox"/> Non-Profit</td> <td><input checked="" type="checkbox"/> Other</td> </tr> <tr> <td><input type="checkbox"/> Government</td> <td></td> </tr> </table>		<input type="checkbox"/> Individual	<input type="checkbox"/> Corporation	<input type="checkbox"/> Sole Proprietor	<input type="checkbox"/> Limited Liability Corporation	<input type="checkbox"/> Partnership	<input type="checkbox"/> Professional Corporation	<input type="checkbox"/> Limited Liability Partnership	<input type="checkbox"/> Disregarded Entity	<input type="checkbox"/> Non-Profit	<input checked="" type="checkbox"/> Other	<input type="checkbox"/> Government	
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<b>FOR CN PROGRAM USE ONLY</b>	<b>FOR AP USE ONLY</b> DATE _____ VENDOR NUMBER _____ VENDOR <input type="checkbox"/> Addition <input type="checkbox"/> Change 1099 <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>FOR FR USE ONLY</b>												



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Direct Deposit ACH Application

Please Check One:  New ACH Application  Change of Financial Institution  
 Change Bank Account Number  Terminate ACH Agreement

**Child Care Provider Information**

Printed Legal Name on Bank Account: Independent School District No. 11  
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Joseph Goyf 11/13/25  
Authorized Signature on Bank Account Date

Child Care Provider must attach a notarized letter on financial institution letterhead that includes the following items below. The letter must be signed and notarized by two separate individuals. Original documents must be mailed or dropped off at the Tahlequah Child Care office.

- account name
- account number
- routing/transit number
- account type: checking or saving

Please pay cards may be accepted. The Child Care Provider must show an authorized Cherokee Nation Child Care employee the account name, account number, routing number and whether the account is checking or savings using their phone, tablet or computer. This ACH application must be notarized by the Cherokee Nation employee after verifying account information is accurate.

**Cherokee Nation Office Use ONLY**

Account verified by (print name): \_\_\_\_\_  
Account verified by (signature): \_\_\_\_\_ Date verified: \_\_\_\_\_  
Name of Bank Employee that Verified Account: \_\_\_\_\_



*That's my bank!*

11/13/2025

Independent School District No. 11  
1501 N Ash St  
Owasso, OK 74055

To Whom It May Concern:

This letter is in reference to your request for account confirmation from RCB Bank. The current account information is as follows:

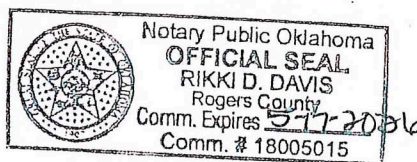
Name: Independent School District No. 11  
Account Number: 00000004800  
Routing Number: 103112594

Account Type: Checking

Thank you for choosing RCB Bank.  
Please contact me if you have any questions or concerns.

Sincerely,

Paige Wooden  
Customer Service Representative  
RCB Bank  
Office: 918.724.1414  
Fax: 918.724.1414



State of Oklahoma  
Department of Human Services

# LICENSE

HODSON ELEMENTARY-SPARK  
14500 E 86th St N  
OWASSO, OK 74055

OWNER: INDEPENDENT SCHOOL DISTRICT NO. 11  
is hereby issued a license to operate a  
CHILD CARE PROGRAM - Out of School Time

under provisions of the Oklahoma Child Care Facilities Licensing Act, as amended, Title 10 Oklahoma Statutes Annotated Sections 401, et seq.

Total Capacity 60

License No. K830056540 Issued 02/29/2024

Meets criteria for

Three Stars ★★★ Effective Date: 4/25/2024

*Jaesta Adams*

Director of Child Care Services



OKLAHOMA  
Human Services



GWJ&B DBP  
**CHEROKEE NATION®**  
 Child Care & Development

P.O. Box 948  
 Tahlequah, OK 74465  
 (918) 453-5300 Main Phone  
 (918) 458-7616 Main Fax  
 (918) 458-4446 Subsidy Fax

**CHILD CARE AUTHORIZATION APPLICATION**  
 (Licensed Center or Home)

**Facility Information:**

CN ID (office use only):

Facility or Provider Name: <b>Mills Elementary-SPARK</b>	
Email: <b>melissa.zumwalt@owagso.org</b>	
Business Phone: <b>918-274-1901</b>	Cell Phone:
Physical Street Address: <b>8200 N. 124<sup>th</sup> E. Ave</b>	City, State, Zip: <b>OWAGSO, OK 74055</b>
Mailing Address (if different from above): <b>1501 N Ash St.</b>	City, State, Zip: <b>OWAGSO, OK 74055</b>
OKDHS License Number: <b>K8-30056541</b>	Licensed Capacity: <b>50</b>
OKDHS Licensing Caseworker Name:	County: <b>Tulsa</b>
Type of Organization: <input type="checkbox"/> Individual/Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation/Inc. <input type="checkbox"/> LLC-Limited Liability Company <input checked="" type="checkbox"/> Public School <input type="checkbox"/> Tribal <input type="checkbox"/> Other: _____	
Type of Facility: <input type="checkbox"/> Child Care Center <input type="checkbox"/> Large Family Child Care Home <input type="checkbox"/> Small Family Child Care Home <input checked="" type="checkbox"/> Before & After Care/Public School (operates year-round: <input type="checkbox"/> yes <input type="checkbox"/> no)	
Star Status (Centers must be a minimum of a Two Star to contract with Cherokee Nation for services): <input type="checkbox"/> One Star <input type="checkbox"/> Two Star <input checked="" type="checkbox"/> Three Star <input type="checkbox"/> Four Star <input type="checkbox"/> Five Star	
Ages of Children Accepted for Care: <b>4-13 years</b>	Days of Operation: <b>Mon-Fri</b>
Hours of Operation: <b>7-8:45 AM ; 3:45-6 pm</b>	
Director Full Name (if applicable): <b>Melissa Zumwalt</b>	Director Cell Phone: <b>918-798-2322</b>

**Owner or President Information:**

Owner/President Full Name: <b>Melissa Zumwalt</b>	Owner/President Cell Phone: <b>918-798-2322</b>
Is the owner a member of a federally recognized tribe? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	If yes, Name of Tribe:
Tribal Registration Number (if applicable):	Owner Date of Birth: <b>11-30-75</b>
If using Federal EIN on W-9 Form, please list here: <b>73-0773051</b>	If using Social Security Number on W-9 Form, please list here: _____

**CHILD CARE AUTHORIZATION APPLICATION**  
(Licensed Center or Home)

Please provide driving directions to the child care facility/home:

- from Hwy 69 - northbound  
 - exit on 86<sup>th</sup> St. N & head East  
 - turn RIGHT on 123<sup>rd</sup> E Ave.  
 - go to the stop sign @ 124<sup>th</sup> E Ave &  
 turn left  
 - go 1/4 of a mile - Mills Elementary  
 will be on your left

1. Provider understands that as a contracted child care provider, they are not an employee of Cherokee Nation.
2. Provider is an independent contractor and will be responsible for all applicable state and federal income tax and obligations related to payments received from the Cherokee Nation under the terms of this agreement.
3. Provider understands they are not eligible for any federal, social security, state workman's compensation or unemployment insurance benefits from the Cherokee Nation by virtue of payment received as a child care provider.
4. Provider acknowledges the receipt of a copy of the requirements for contracted licensed/unlicensed child care providers. Provider agrees that if contracted, it is the provider's responsibility to follow these requirements at all times and abide to any and all terms of this agreement.
5. Provider certifies the above information is correct to the best of their knowledge and certify their relationship as indicated. Provider understands that any false statements made on this form and/or in any other written statement, declaration, and/or background check request submitted therewith may result in prosecution for fraud or denial of contract.

Director Signature (if applicable) <i>Melissa Zumwalt</i>	Director Name (printed) Melissa Zumwalt	Date Signed 4-22-2026
Owner/President Signature	Owner/President Name (printed)	Date Signed

**Office Use Only**

LCW:	NVD:	Date App Received:
Date Orientation Complete:	DHS CW:	Contract Start Date:
Reviewed by:	<input type="checkbox"/> Approved <input type="checkbox"/> Denied Reason for Denial:	



GWYB DBP  
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Tahlequah, OK 74465  
(918) 453-5300 Main Phone  
(918) 458-7616 Main Fax  
(918) 458-4446 Subsidy Fax

### DECLARATION FOR CHILD CARE PROVIDERS

The Cherokee Nation Child Care Licensing Program requires all providers to sign a declaration before providing child care services to children and youth.

This declaration shall include all prior criminal convictions/court actions related to:

1. Child sexual abuse and their disposition,
2. Other forms of child care abuse and/or neglect,
3. The commission of felonies,
4. Drugs and alcohol,
5. Removing children from your home,
6. And/or child abuse, sexual offenses or violent felonies for which the record has been expunged, pardoned, or set aside under federal, state, or tribal law.

**This declaration may exclude:**

- Other offenses not related to child abuse and/or child sexual abuse or violent felonies committed before the prospective provider's 18<sup>th</sup> birthday, which was adjudicated in a juvenile court or under a youthful offender law.
- Other convictions not mentioned above for which the record has been expunged under federal, tribal or state law.
- Any convictions set aside under the federal youth corrections act or similar authority.

Please check the applicable statement below regarding the above criminal convictions/court actions.

I **have not** been convicted or involved in a court action that involves one or more of the six types of actions/offenses listed above.

I **have** been convicted or involved in a court action that involves one or more of the six types of actions/offenses listed above. **If you have been convicted or involved in a court action listed above, please attach information detailing the offense(s) or action, the date(s) of the conviction or action, and other relevant information.**

*Melissa Zumwalt*      Melissa Zumwalt      4/22/2026  
Provider/Owner Signature      Provider/Owner Name (printed)      Date Signed



## Cherokee Nation Substitute Form W-9 Request for Taxpayer Identification Number and Certification

NOTE: Your United States TAXPAYER IDENTIFICATION NUMBER MUST be provided regardless of your tax status. Name must be the same as that filed with the Internal Revenue Service (IRS) or the Social Security Administration (SSA), as applicable. Failure to return this form in a timely manner will delay the order and/or payment. The following information needs to be completed and returned to your contact person at Cherokee Nation.

PRINT OR TYPE - ALL FIELDS MUST BE COMPLETED

<b>1. LEGAL NAME</b> (As entered with IRS or SSA) If Sole Proprietorship, enter your LAST, FIRST, MI <span style="font-size: 1.2em; color: blue;">Independent School District No. 11 of Tulsa County</span>		
<b>2. TRADE NAME</b> (If doing business as (D/B/A) or business name of Sole Proprietorship) <span style="font-size: 1.2em; color: blue;">Owasso Public Schools</span>	<b>3. Exemptions</b> (Codes apply only to certain entities; not individuals) Exempt Payee code (if any) <span style="font-size: 1.2em; color: blue;">3</span> Exemption FATCA reporting Code (if any) <span style="font-size: 1.2em; color: blue;">C</span> <small>(Applies to accounts maintained outside the U.S.)</small>	
<b>4. PRIMARY ADDRESS</b> (Physical Address) Number and street <span style="font-size: 1.2em; color: blue;">1501 N. Ash St.</span> City, State, Zip + 4 <span style="font-size: 1.2em; color: blue;">OWASSO, OK 74055</span>	<b>6. Vendor Entity Type</b> (Select only one box) <input type="checkbox"/> Individual <span style="float: right;"><input type="checkbox"/> Corporation</span> <input type="checkbox"/> Sole Proprietor <span style="float: right;"><input type="checkbox"/> Limited Liability Corporation</span> <input type="checkbox"/> Partnership <span style="float: right;"><input type="checkbox"/> Professional Corporation</span> <input type="checkbox"/> Limited Liability Partnership <span style="float: right;"><input type="checkbox"/> Disregarded Entity</span> <input type="checkbox"/> Non-Profit <span style="float: right;"><input checked="" type="checkbox"/> Other</span> <input type="checkbox"/> Government	
<b>5. REMIT ADDRESS</b> (Mailing Address if different from above) PO Box or number and street City, State, Zip + 4	<b>8. Minority Certification</b> (Select all that apply and attach copy of certification) <input type="checkbox"/> Certified Indian Owned (Tribe) <span style="float: right;"><input type="checkbox"/> Female Owned</span> <input type="checkbox"/> Certified Major Cherokee Employer <span style="float: right;"><input type="checkbox"/> Other Minority Owned</span> <input type="checkbox"/> Small Disadvantage <span style="float: right;"><input checked="" type="checkbox"/> None Apply</span> <input type="checkbox"/> TERO Certified	
<b>7. CONTACT INFORMATION</b> Email Address: <span style="font-size: 1.2em; color: blue;">phillip.storm@owassops.org</span> Phone Number: <span style="font-size: 1.2em; color: blue;">918-272-5367</span> Fax Number: Contact Name: <span style="font-size: 1.2em; color: blue;">Phillip Storm</span> Contact Title: <span style="font-size: 1.2em; color: blue;">CFO</span>		
<b>9. TAXPAYER IDENTIFICATION NUMBER (TIN)</b> Federal Employer Identification No. (FEIN) <span style="font-size: 1.2em; color: blue;">73-0773051</span> <small>OR</small> Social Security Number (SSN)		
<b>10. Purpose for W-9</b> <input type="checkbox"/> Providing Goods <span style="float: right;"><input checked="" type="checkbox"/> Receiving CN Program Assistance</span> <input type="checkbox"/> Providing Services <span style="float: right;"><input type="checkbox"/> Expense Reimbursement</span> <input type="checkbox"/> Providing Goods and Services		
<b>CERTIFICATION:</b> Under penalties of perjury, I certify that: 1. The number shown on this form is my correct taxpayer identification number and that the information I provided is correct and complete; and 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and 3. I am a U.S. citizen or other U.S. person (defined in instructions); and 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.  <b>Certification instructions.</b> You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.		
Signature Title <span style="font-size: 1.2em; color: blue;">CFO</span> <span style="float: right;">Date <span style="font-size: 1.2em; color: blue;">4/22/2026</span></span> <small>Please Print</small>		
<b>FOR CN PROGRAM USE ONLY</b>	<b>FOR AP USE ONLY</b> DATE _____ VENDOR NUMBER _____ VENDOR <input type="checkbox"/> Addition <input type="checkbox"/> Change 1099 <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>FOR FR USE ONLY</b>





*That's my bank!*

11/13/2025

Independent School District No. 11  
1501 N Ash St  
Owasso, OK 74055

To Whom It May Concern:

This letter is in reference to your request for account confirmation from RCB Bank. The current account information is as follows:

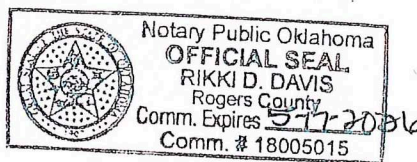
Name: Independent School District No. 11  
Account Number: 00000004800  
Routing Number: 103112594

Account Type: Checking

Thank you for choosing RCB Bank.  
Please contact me if you have any questions or concerns.

Sincerely,

Paige Wooden  
Customer Service Representative  
RCB Bank  
Office: 918.724.1414  
Fax: 918.724.1414



State of Oklahoma  
Department of Human Services

## LICENSE

MILLS ELEMENTARY-SPARK

8200 N 124th E Ave

OWASSO, OK 74055

OWNER: INDEPENDENT SCHOOL DISTRICT NO. 11

is hereby issued a license to operate a

CHILD CARE PROGRAM - Out of School Time

under provisions of the Oklahoma Child Care Facilities Licensing Act, as amended, Title 10 Oklahoma Statutes Annotated Sections 401, et seq.

Total Capacity 50

License No. K830056541 Issued 01/31/2024

Meets criteria for

Three Stars ★★★

Effective Date: 4/24/2024



OKLAHOMA  
Human Services

Director of Child Care Services

A handwritten signature in black ink, appearing to be "B. J. L.".



GWYD DBP  
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P.O. Box 948  
Tahlequah, OK 74465  
(918) 453-5300 Main Phone  
(918) 458-7616 Main Fax  
(918) 458-4446 Subsidy Fax

**CHILD CARE AUTHORIZATION APPLICATION**  
(Licensed Center or Home)

**Facility Information:**

CN ID (office use only):

Facility or Provider Name: <b>Morrow Elementary - SPARK</b>		
Email: <b>melissa.zumwalt@owagops.org</b>		
Business Phone: <b>918-274-1901</b>	Cell Phone:	
Physical Street Address: <b>12301 N. 132nd E. Ave.</b>	City, State, Zip: <b>Collinsville, OK 74021</b>	
Mailing Address (if different from above): <b>1501 N. Ash St.</b>	City, State, Zip: <b>OWASSO, OK 74055</b>	
OKDHS License Number: <b>K8-830056542</b>	Licensed Capacity: <b>60</b>	
OKDHS Licensing Caseworker Name:	County: <b>TULSA</b>	
Type of Organization: <input type="checkbox"/> Individual/Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation/Inc. <input type="checkbox"/> LLC-Limited Liability Company <input checked="" type="checkbox"/> Public School <input type="checkbox"/> Tribal <input type="checkbox"/> Other: _____		
Type of Facility: <input type="checkbox"/> Child Care Center <input type="checkbox"/> Large Family Child Care Home <input type="checkbox"/> Small Family Child Care Home <input checked="" type="checkbox"/> Before & After Care/Public School (operates year-round: <input type="checkbox"/> yes <input type="checkbox"/> no)		
Star Status (Centers must be a minimum of a Two Star to contract with Cherokee Nation for services): <input type="checkbox"/> One Star <input type="checkbox"/> Two Star <input checked="" type="checkbox"/> Three Star <input type="checkbox"/> Four Star <input type="checkbox"/> Five Star		
Ages of Children Accepted for Care: <b>4-13 years</b>	Days of Operation: <b>Mon-Fri</b>	Hours of Operation: <b>7-8:45AM ; 3:45-6 PM</b>
Director Full Name (if applicable): <b>Melissa Zumwalt</b>	Director Cell Phone: <b>918-798-2322</b>	

**Owner or President Information:**


Owner/President Full Name: <b>Melissa Zumwalt</b>	Owner/President Cell Phone: <b>918-798-2322</b>
Is the owner a member of a federally recognized tribe? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	If yes, Name of Tribe:
Tribal Registration Number (if applicable):	Owner Date of Birth: <b>11-30-1975</b>
If using Federal EIN on W-9 Form, please list here: <b>73-0773051</b>	If using Social Security Number on W-9 Form, please list here: _____

**CHILD CARE AUTHORIZATION APPLICATION**  
(Licensed Center or Home)

Please provide driving directions to the child care facility/home:

- From US Hwy 169 - northbound  
 - exit on 116th St. N. & head west  
 - turn R on 127th E Ave.  
 - turn R on 122nd St. N. - follow street  
 as it will turn into 132nd E. Ave.  
 - you will see Morrow on your left

1. Provider understands that as a contracted child care provider, they are not an employee of Cherokee Nation.
2. Provider is an independent contractor and will be responsible for all applicable state and federal income tax and obligations related to payments received from the Cherokee Nation under the terms of this agreement.
3. Provider understands they are not eligible for any federal, social security, state workman's compensation or unemployment insurance benefits from the Cherokee Nation by virtue of payment received as a child care provider.
4. Provider acknowledges the receipt of a copy of the requirements for contracted licensed/unlicensed child care providers. Provider agrees that if contracted, it is the provider's responsibility to follow these requirements at all times and abide to any and all terms of this agreement.
5. Provider certifies the above information is correct to the best of their knowledge and certify their relationship as indicated. Provider understands that any false statements made on this form and/or in any other written statement, declaration, and/or background check request submitted therewith may result in prosecution for fraud or denial of contract.

Director Signature (if applicable)	Director Name (printed)	Date Signed
	Melissa Zumwalt	4-22-26
Owner/President Signature	Owner/President Name (printed)	Date Signed

**Office Use Only**

LCW:	NVD:	Date App Received:
Date Orientation Complete:	DHS CW:	Contract Start Date:
Reviewed by:	<input type="checkbox"/> Approved <input type="checkbox"/> Denied Reason for Denial:	



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(918) 458-4446 Subsidy Fax

### **DECLARATION FOR CHILD CARE PROVIDERS**

The Cherokee Nation Child Care Licensing Program requires all providers to sign a declaration before providing child care services to children and youth.

This declaration shall include all prior criminal convictions/court actions related to:

1. Child sexual abuse and their disposition,
2. Other forms of child care abuse and/or neglect,
3. The commission of felonies,
4. Drugs and alcohol,
5. Removing children from your home,
6. And/or child abuse, sexual offenses or violent felonies for which the record has been expunged, pardoned, or set aside under federal, state, or tribal law.

**This declaration may exclude:**

- Other offenses not related to child abuse and/or child sexual abuse or violent felonies committed before the prospective provider's 18<sup>th</sup> birthday, which was adjudicated in a juvenile court or under a youthful offender law.
- Other convictions not mentioned above for which the record has been expunged under federal, tribal or state law.
- Any convictions set aside under the federal youth corrections act or similar authority.

Please check the applicable statement below regarding the above criminal convictions/court actions.

I **have not** been convicted or involved in a court action that involves one or more of the six types of actions/offenses listed above.

I **have** been convicted or involved in a court action that involves one or more of the six types of actions/offenses listed above. **If you have been convicted or involved in a court action listed above, please attach information detailing the offense(s) or action, the date(s) of the conviction or action, and other relevant information.**

*Melissa Zumwalt*

Provider Owner Signature

Provider Owner Name (printed)

Melissa Zumwalt 4-22-26

Date Signed



## Cherokee Nation Substitute Form W-9 Request for Taxpayer Identification Number and Certification

NOTE: Your United States TAXPAYER IDENTIFICATION NUMBER MUST be provided regardless of your tax status. Name must be the same as that filed with the Internal Revenue Service (IRS) or the Social Security Administration (SSA), as applicable. Failure to return this form in a timely manner will delay the order and/or payment. The following information needs to be completed and returned to your contact person at Cherokee Nation

PRINT OR TYPE – ALL FIELDS MUST BE COMPLETED

<b>1. LEGAL NAME</b> (As entered with IRS or SSA) If Sole Proprietorship, enter your LAST, FIRST, MI <span style="font-size: 1.2em; color: blue;">Independent School District No. 11 of Tulsa County</span>		
<b>2. TRADE NAME</b> (If doing business as (D/B/A) or business name of Sole Proprietorship) <span style="font-size: 1.2em; color: blue;">Owasso Public Schools</span>	<b>3. Exemptions</b> (Codes apply only to certain entities; not individuals) Exempt Payee code (if any) <span style="font-size: 1.2em; color: blue;">3</span> Exemption FATCA reporting Code (if any) <span style="font-size: 1.2em; color: blue;">C</span> <small>(Applies to accounts maintained outside the U.S.)</small>	
<b>4. PRIMARY ADDRESS</b> (Physical Address) Number and street <span style="font-size: 1.2em; color: blue;">1501 N. Ash St.</span> City, State, Zip + 4 <span style="font-size: 1.2em; color: blue;">OWASSO, OK 74055</span>	<b>6. Vendor Entity Type</b> (Select only one box) <input type="checkbox"/> Individual <span style="float: right;"><input type="checkbox"/> Corporation</span> <input type="checkbox"/> Sole Proprietor <span style="float: right;"><input type="checkbox"/> Limited Liability Corporation</span> <input type="checkbox"/> Partnership <span style="float: right;"><input type="checkbox"/> Professional Corporation</span> <input type="checkbox"/> Limited Liability Partnership <span style="float: right;"><input type="checkbox"/> Disregarded Entity</span> <input type="checkbox"/> Non-Profit <span style="float: right;"><input checked="" type="checkbox"/> Other</span> <input type="checkbox"/> Government	
<b>5. REMIT ADDRESS</b> (Mailing Address if different from above) PO Box or number and street City, State, Zip + 4	<b>8. Minority Certification</b> (Select all that apply and attach copy of certification) <input type="checkbox"/> Certified Indian Owned (Tribe) <span style="float: right;"><input type="checkbox"/> Female Owned</span> <input type="checkbox"/> Certified Major Cherokee Employer <span style="float: right;"><input type="checkbox"/> Other Minority Owned</span> <input type="checkbox"/> Small Disadvantage <span style="float: right;"><input checked="" type="checkbox"/> None Apply</span> <input type="checkbox"/> TERO Certified	
<b>7. CONTACT INFORMATION</b> Email Address: <span style="font-size: 1.2em; color: blue;">phillip.storm@owassops.org</span> Phone Number: <span style="font-size: 1.2em; color: blue;">918-272-5367</span> Fax Number: Contact Name: <span style="font-size: 1.2em; color: blue;">Phillip Storm</span> Contact Title: <span style="font-size: 1.2em; color: blue;">CFO</span>	<b>10. Purpose for W-9</b> <input type="checkbox"/> Providing Goods <span style="float: right;"><input checked="" type="checkbox"/> Receiving CN Program Assistance</span> <input type="checkbox"/> Providing Services <span style="float: right;"><input type="checkbox"/> Expense Reimbursement</span> <input type="checkbox"/> Providing Goods and Services	
<b>9. TAXPAYER IDENTIFICATION NUMBER (TIN)</b> Federal Employer Identification No. (FEIN) <span style="font-size: 1.2em; color: blue;">73-0773051</span> OR Social Security Number (SSN)	<b>CERTIFICATION:</b> Under penalties of perjury, I certify that: 1. The number shown on this form is my correct taxpayer identification number and that the information I provided is correct and complete; and 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and 3. I am a U.S. citizen or other U.S. person (defined in instructions); and 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.  <b>Certification instructions.</b> You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.	
Signature Title <span style="font-size: 1.2em; color: blue;">CFO</span> <span style="float: right;">Date <span style="font-size: 1.2em; color: blue;">4/22/2026</span></span> <small>Please Print</small>		
<b>FOR CN PROGRAM USE ONLY</b>	<b>FOR AP USE ONLY</b> DATE _____ VENDOR NUMBER _____ VENDOR <input type="checkbox"/> Addition <input type="checkbox"/> Change 1099 <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>FOR FR USE ONLY</b>



GWYJ DJF

# CHEROKEE NATION<sup>®</sup> Child Care & Development

P.O. Box 948  
Tahlequah, OK 74465  
918-453-5300 Main Phone  
918-458-7616 Main Fax  
918-458-4446 Subsidy Fax

## Direct Deposit ACH Application

Please Check One:  New ACH Application  Change of Financial Institution  
 Change Bank Account Number  Terminate ACH Agreement

### Child Care Provider Information

Printed Legal Name on Bank Account: Independent School District No. 11  
Trade Name DBA (if not legal name): Owasso Public Schools  
SSN or EIN (Tax ID Number): 73-0773051 Phone Number: 918-272-5367  
Mailing Address: 1501 N. Ash St.  
City, State, Zip: Owasso OK 74055  
Email Address for Payment Notification (Required): \_\_\_\_\_

### Financial Institution Information

Name of Financial Institution: RCB Bank  
Financial Institution Address (main branch): 11633 E 86<sup>th</sup> St. N.  
Financial Institution City, State, Zip: Owasso OK 74055  
Account Number: 00000004800  
Routing Number: 103112594  
Louise Goyf 4/13/25  
Authorized Signature on Bank Account Date

Child Care Provider must attach a notarized letter on financial institution letterhead that includes the following items below. The letter must be signed and notarized by two separate individuals. Original documents must be mailed or dropped off at the Tahlequah Child Care office.

- ▶ account name
- ▶ account number
- ▶ routing/transit number
- ▶ account type, checking or savings

Please app verify must be accepted. The Child Care Provider must show an authorized Cherokee Nation Child Care employee the account name, account number, routing number, and whether the account is checking or savings using their phone, tablet or computer. The ACH application must be notarized by the Cherokee Nation employee after verifying account information to accuracy.

### Cherokee Nation Office Use ONLY

Account verified by (print name): \_\_\_\_\_  
Account verified by (signature): \_\_\_\_\_ Date verified: \_\_\_\_\_  
Name of Bank Employee that Verified Account: \_\_\_\_\_

# RCB BANK

*That's my bank!*

11/13/2025

Independent School District No. 11  
1501 N Ash St  
Owasso, OK 74055

To Whom It May Concern:


This letter is in reference to your request for account confirmation from RCB Bank. The current account information is as follows:

Name: Independent School District No. 11  
Account Number: 00000004800  
Routing Number: 103112594

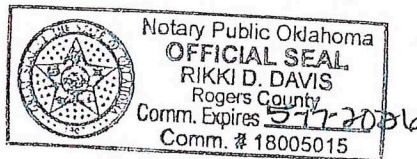
Account Type: Checking

Thank you for choosing RCB Bank.  
Please contact me if you have any questions or concerns.

Sincerely,



Paige Wooden  
Customer Service Representative  
RCB Bank  
Office: 918.724.1414  
Fax: 918.724.1414



State of Oklahoma  
Department of Human Services

## LICENSE

MORROW ELEMENTARY-SPARK  
12301 N 132nd E Ave  
COLLINSVILLE, OK 74021

OWNER: INDEPENDENT SCHOOL DISTRICT NO. 11

is hereby issued a license to operate a

CHILD CARE PROGRAM - Out of School Time

under provisions of the Oklahoma Child Care Facilities Licensing Act, as amended, Title 10 Oklahoma Statutes Annotated Sections 401, et seq.

Total Capacity 50

License No. K830056542 Issued 01/31/2024

Meets criteria for

Three Stars ★★ ★ Effective Date: 4/29/2024



Director of Child Care Services





GWYD DBP  
**CHEROKEE NATION®**  
 Child Care & Development

P.O. Box 948  
 Tahlequah, OK 74465  
 (918) 453-5300 Main Phone  
 (918) 458-7616 Main Fax  
 (918) 458-4446 Subsidy Fax

**CHILD CARE AUTHORIZATION APPLICATION**  
 (Licensed Center or Home)

**Facility Information:**

CN ID (office use only):

Facility or Provider Name: <b>Northeast Elementary SPARK</b>		
Email: <b>melissa.zumwalt@owassops.org</b>		
Business Phone: <b>918-274-1901</b>	Cell Phone:	
Physical Street Address: <b>13650 E. 103rd St. N</b>	City, State, Zip: <b>OWASSO, OK 74055</b>	
Mailing Address (if different from above): <b>1501 N Ash St.</b>	City, State, Zip: <b>OWASSO, OK 74055</b>	
OKDHS License Number: <b>K8-30056543</b>	Licensed Capacity: <b>50</b>	
OKDHS Licensing Caseworker Name:	County: <b>Tulsa</b>	
Type of Organization: <input type="checkbox"/> Individual/Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation/Inc. <input type="checkbox"/> LLC-Limited Liability Company <input checked="" type="checkbox"/> Public School <input type="checkbox"/> Tribal <input type="checkbox"/> Other: _____		
Type of Facility: <input type="checkbox"/> Child Care Center <input type="checkbox"/> Large Family Child Care Home <input type="checkbox"/> Small Family Child Care Home <input checked="" type="checkbox"/> Before & After Care/Public School (operates year-round: <input type="checkbox"/> yes <input type="checkbox"/> no)		
Star Status (Centers must be a minimum of a Two Star to contract with Cherokee Nation for services): <input type="checkbox"/> One Star <input type="checkbox"/> Two Star <input checked="" type="checkbox"/> Three Star <input type="checkbox"/> Four Star <input type="checkbox"/> Five Star		
Ages of Children Accepted for Care: <b>4-13 years</b>	Days of Operation: <b>Mon-Fri</b>	Hours of Operation: <b>7-8:45AM ; 3:45-6pm</b>
Director Full Name (if applicable): <b>Melissa Zumwalt</b>	Director Cell Phone: <b>918-798-2322</b>	

**Owner or President Information:**

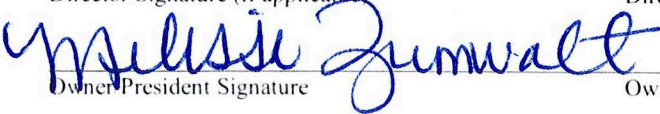
Owner/President Full Name: <b>Melissa Zumwalt</b>	Owner/President Cell Phone: <b>918-798-2322</b>
Is the owner a member of a federally recognized tribe? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	If yes, Name of Tribe:
Tribal Registration Number (if applicable):	Owner Date of Birth: <b>11-30-1975</b>
If using Federal EIN on W-9 Form, please list here: <b>73-0773051</b>	If using Social Security Number on W-9 Form, please list here: _____

**CHILD CARE AUTHORIZATION APPLICATION**  
(Licensed Center or Home)

Please provide driving directions to the child care facility/home:

- From US Hwy 169 - northbound  
 - exit on 96th St. & head East  
 - at the light (129th E Ave) - turn L  
 - immediately turn R onto "Old Highway 169"  
 - go down that road approx 1/2 mile  
 - turn R onto 103rd St. N.  
 - go past La Petite & then you'll see  
 Northeast Elementary

1. Provider understands that as a contracted child care provider, they are not an employee of Cherokee Nation.
2. Provider is an independent contractor and will be responsible for all applicable state and federal income tax and obligations related to payments received from the Cherokee Nation under the terms of this agreement.
3. Provider understands they are not eligible for any federal, social security, state workman's compensation or unemployment insurance benefits from the Cherokee Nation by virtue of payment received as a child care provider.
4. Provider acknowledges the receipt of a copy of the requirements for contracted licensed/unlicensed child care providers. Provider agrees that if contracted, it is the provider's responsibility to follow these requirements at all times and abide to any and all terms of this agreement.
5. Provider certifies the above information is correct to the best of their knowledge and certify their relationship as indicated. Provider understands that any false statements made on this form and/or in any other written statement, declaration, and/or background check request submitted therewith may result in prosecution for fraud or denial of contract.

Director Signature (if applicable) 	Director Name (printed) Melissa Zumwalt	Date Signed 4/22/26
Owner/President Signature	Owner/President Name (printed)	Date Signed

**Office Use Only**

LCW:	NVD:	Date App Received:
Date Orientation Complete:	DHS CW:	Contract Start Date:
Reviewed by:	<input type="checkbox"/> Approved <input type="checkbox"/> Denied Reason for Denial:	



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(918) 458-4446 Subsidy Fax

### **DECLARATION FOR CHILD CARE PROVIDERS**

The Cherokee Nation Child Care Licensing Program requires all providers to sign a declaration before providing child care services to children and youth.

This declaration shall include all prior criminal convictions/court actions related to:

1. Child sexual abuse and their disposition,
2. Other forms of child care abuse and/or neglect,
3. The commission of felonies,
4. Drugs and alcohol,
5. Removing children from your home,
6. And/or child abuse, sexual offenses or violent felonies for which the record has been expunged, pardoned, or set aside under federal, state, or tribal law.

**This declaration may exclude:**

- Other offenses not related to child abuse and/or child sexual abuse or violent felonies committed before the prospective provider's 18<sup>th</sup> birthday, which was adjudicated in a juvenile court or under a youthful offender law.
- Other convictions not mentioned above for which the record has been expunged under federal, tribal or state law.
- Any convictions set aside under the federal youth corrections act or similar authority.

Please check the applicable statement below regarding the above criminal convictions/court actions.

I **have not** been convicted or involved in a court action that involves one or more of the six types of actions/offenses listed above.

I **have** been convicted or involved in a court action that involves one or more of the six types of actions/offenses listed above. **If you have been convicted or involved in a court action listed above, please attach information detailing the offense(s) or action, the date(s) of the conviction or action, and other relevant information.**

*Melissa Zumwalt*      Melissa Zumwalt      4/22/26  
Provider/Owner Signature      Provider/Owner Name (printed)      Date Signed



# Cherokee Nation Substitute Form W-9

## Request for Taxpayer Identification Number and Certification

NOTE: Your United States TAXPAYER IDENTIFICATION NUMBER MUST be provided regardless of your tax status. Name must be the same as that filed with the Internal Revenue Service (IRS) or the Social Security Administration (SSA), as applicable. Failure to return this form in a timely manner will delay the order and/or payment. The following information needs to be completed and returned to your contact person at Cherokee Nation.

PRINT OR TYPE - ALL FIELDS MUST BE COMPLETED

<b>1. LEGAL NAME</b> (As entered with IRS or SSA) If Sole Proprietorship, enter your LAST, FIRST, MI <span style="font-size: 1.2em; color: blue;">Independent School District No. 11 of Tulsa County</span>		
<b>2. TRADE NAME</b> (If doing business as (D/B/A) or business name of Sole Proprietorship) <span style="font-size: 1.2em; color: blue;">Owasso Public Schools</span>	<b>3. Exemptions</b> (Codes apply only to certain entities; not individuals) Exempt Payee code (if any) <span style="font-size: 1.2em; color: blue;">3</span> Exemption FATCA reporting Code (if any) <span style="font-size: 1.2em; color: blue;">C</span> <small>(Applies to accounts maintained outside the U.S.)</small>	
<b>4. PRIMARY ADDRESS</b> (Physical Address) Number and street <span style="font-size: 1.2em; color: blue;">1501 N. Ash St.</span> City, State, Zip + 4 <span style="font-size: 1.2em; color: blue;">OWASSO, OK 74055</span>	<b>6. Vendor Entity Type</b> (Select only one box) <input type="checkbox"/> Individual <span style="float: right;"><input type="checkbox"/> Corporation</span> <input type="checkbox"/> Sole Proprietor <span style="float: right;"><input type="checkbox"/> Limited Liability Corporation</span> <input type="checkbox"/> Partnership <span style="float: right;"><input type="checkbox"/> Professional Corporation</span> <input type="checkbox"/> Limited Liability Partnership <span style="float: right;"><input type="checkbox"/> Disregarded Entity</span> <input type="checkbox"/> Non-Profit <span style="float: right;"><input checked="" type="checkbox"/> Other</span> <input type="checkbox"/> Government	
<b>5. REMIT ADDRESS</b> (Mailing Address if different from above) PO Box or number and street City, State, Zip + 4	<b>8. Minority Certification</b> (Select all that apply and attach copy of certification) <input type="checkbox"/> Certified Indian Owned (Tribe) <span style="float: right;"><input type="checkbox"/> Female Owned</span> <input type="checkbox"/> Certified Major Cherokee Employer <span style="float: right;"><input type="checkbox"/> Other Minority Owned</span> <input type="checkbox"/> Small Disadvantage <span style="float: right;"><input checked="" type="checkbox"/> None Apply</span> <input type="checkbox"/> TERO Certified	
<b>7. CONTACT INFORMATION</b> Email Address: <span style="font-size: 1.2em; color: blue;">phillip.storm@owassops.org</span> Phone Number: <span style="font-size: 1.2em; color: blue;">918-272-5367</span> Fax Number: Contact Name: <span style="font-size: 1.2em; color: blue;">Phillip Storm</span> Contact Title: <span style="font-size: 1.2em; color: blue;">CFO</span>	<b>10. Purpose for W-9</b> <input type="checkbox"/> Providing Goods <span style="float: right;"><input checked="" type="checkbox"/> Receiving CN Program Assistance</span> <input type="checkbox"/> Providing Services <span style="float: right;"><input type="checkbox"/> Expense Reimbursement</span> <input type="checkbox"/> Providing Goods and Services	
<b>9. TAXPAYER IDENTIFICATION NUMBER (TIN)</b> Federal Employer Identification No. (FEIN) <span style="font-size: 1.2em; color: blue;">73-0773051</span> OR Social Security Number (SSN)	<b>CERTIFICATION:</b> Under penalties of perjury, I certify that: 1. The number shown on this form is my correct taxpayer identification number and that the information I provided is correct and complete; and 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and 3. I am a U.S. citizen or other U.S. person (defined in instructions); and 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.  <b>Certification instructions.</b> You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.	
Signature Title <span style="font-size: 1.2em; color: blue;">CFO</span> <span style="float: right;">Date <span style="font-size: 1.2em; color: blue;">4/22/2026</span></span> <small>Please Print</small>		
<b>FOR CN PROGRAM USE ONLY</b>	<b>FOR AP USE ONLY</b> DATE _____ VENDOR NUMBER _____ VENDOR <input type="checkbox"/> Addition <input type="checkbox"/> Change 1099 <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>FOR FR USE ONLY</b>



GWYD DJF  
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Child Care & Development

P.O. Box 948  
Tahlequah, OK 74465  
918-453-5300 Main Phone  
918-458-7616 Main Fax  
918-458-4446 Subsidy Fax

Direct Deposit ACH Application

Please Check One:  New ACH Application  Change of Financial Institution  
 Change Bank Account Number  Terminate ACH Agreement

**Child Care Provider Information**

Printed Legal Name on Bank Account: Independent School District No. 11  
Trade Name DBA (if not legal name): Owasso Public Schools  
SSN or EIN (Tax ID Number): 73-0773051 Phone Number: 918-272-5367  
Mailing Address: 1501 N. Ash St.  
City, State, Zip: Owasso OK 74055  
Email Address for Payment Notification (Required): \_\_\_\_\_

**Financial Institution Information**

Name of Financial Institution: RCB Bank  
Financial Institution Address (main branch): 11633 E 86<sup>th</sup> St. N.  
Financial Institution City, State, Zip: Owasso OK 74055  
Account Number: 00000004800  
Routing Number: 103112594  
Wayne Goff 4/13/25  
Authorized Signature on Bank Account Date

Child Care Provider must attach a notarized letter on financial institution letterhead that includes the following items below. The letter must be signed and notarized by two separate individuals. Original Documents must be mailed or dropped off at the Tahlequah Child Care office.

- account name
- account number
- routing branch number
- account type, checking or saving

Please app verify must be accepted. The Child Care Provider must show an authorized Cherokee Nation Child Care employee the account name, account number, routing number and whether the account is checking or savings using their phone, tablet or computer. This ACH application must be notarized by the Cherokee Nation employee after verifying account information is accurate.

**Cherokee Nation Office Use ONLY**

Account verified by (print name): \_\_\_\_\_  
Account verified by (signature): \_\_\_\_\_ Date verified: \_\_\_\_\_  
Name of Bank Employee that Verified Account: \_\_\_\_\_



*That's my bank!*

11/13/2025

Independent School District No. 11  
1501 N Ash St  
Owasso, OK 74055

To Whom It May Concern:

This letter is in reference to your request for account confirmation from RCB Bank. The current account information is as follows:

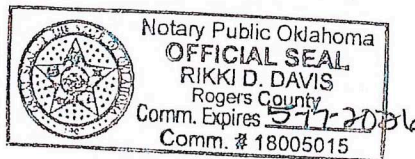
Name: Independent School District No. 11  
Account Number: 00000004800  
Routing Number: 103112594

Account Type: Checking

Thank you for choosing RCB Bank.  
Please contact me if you have any questions or concerns.

Sincerely,

Paige Wooden  
Customer Service Representative  
RCB Bank  
Office: 918.724.1414  
Fax: 918.724.1414



State of Oklahoma  
Department of Human Services

# LICENSE

NORTHEAST ELEMENTARY-SPARK

13650 E 103rd St N

OWASSO, OK 74055

OWNER: INDEPENDENT SCHOOL DISTRICT NO. 11

is hereby issued a license to operate a

CHILD CARE PROGRAM - Out of School Time

under provisions of the Oklahoma Child Care Facilities Licensing Act, as amended, Title 10 Oklahoma Statutes Annotated Sections 401, et seq.

Total Capacity 100

License No. K830056543 Issued 01/31/2024

Meets criteria for

Three Stars ★★★ Effective Date: 4/24/2024



Director of Child Care Services



OKLAHOMA  
Human Services



GWO DBP  
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 (918) 453-5300 Main Phone  
 (918) 458-7616 Main Fax  
 (918) 458-4446 Subsidy Fax

**CHILD CARE AUTHORIZATION APPLICATION**  
 (Licensed Center or Home)

**Facility Information:**

CN ID (office use only):

Facility or Provider Name: <b>Smith Elementary - SPARK</b>	
Email: <b>melissa.zumwalt@owassops.org</b>	
Business Phone: <b>918-274-1901</b>	Cell Phone:
Physical Street Address: <b>12223 E. 91st St. N</b>	City, State, Zip: <b>OWASSO, OK 74055</b>
Mailing Address (if different from above): <b>1501 N. Ash St.</b>	City, State, Zip: <b>OWASSO, OK 74055</b>
OKDHS License Number: <b>K8-30056545</b>	Licensed Capacity: <b>50</b>
OKDHS Licensing Caseworker Name:	County: <b>Tulsa</b>
Type of Organization: <input checked="" type="checkbox"/> Individual/Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation/Inc. <input type="checkbox"/> LLC-Limited Liability Company <input checked="" type="checkbox"/> Public School <input type="checkbox"/> Tribal <input type="checkbox"/> Other: _____	
Type of Facility: <input type="checkbox"/> Child Care Center <input type="checkbox"/> Large Family Child Care Home <input type="checkbox"/> Small Family Child Care Home <input checked="" type="checkbox"/> Before & After Care/Public School (operates year-round: <input type="checkbox"/> yes <input checked="" type="checkbox"/> no)	
Star Status (Centers must be a minimum of a Two Star to contract with Cherokee Nation for services): <input type="checkbox"/> One Star <input type="checkbox"/> Two Star <input checked="" type="checkbox"/> Three Star <input type="checkbox"/> Four Star <input type="checkbox"/> Five Star	
Ages of Children Accepted for Care: <b>4-13 year</b>	Days of Operation: <b>Mon-Fri</b>
Hours of Operation: <b>7-8:45 AM; 3:45-6 PM</b>	
Director Full Name (if applicable): <b>Melissa Zumwalt</b>	Director Cell Phone: <b>918-798-2322</b>

**Owner or President Information:**

Owner/President Full Name: <b>Melissa Zumwalt</b>	Owner/President Cell Phone: <b>918-798-2322</b>
Is the owner a member of a federally recognized tribe? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	If yes, Name of Tribe:
Tribal Registration Number (if applicable):	Owner Date of Birth: <b>11-30-1975</b>
If using Federal EIN on W-9 Form, please list here: <b>73-0773051</b>	If using Social Security Number on W-9 Form, please list here: _____

**CHILD CARE AUTHORIZATION APPLICATION**  
(Licensed Center or Home)

Please provide driving directions to the child care facility/home:

- from Hwy 169 - northbound  
 - exit on 8<sup>th</sup> St. & head East  
 - go 1/2 mile & turn left on 123<sup>rd</sup> E Ave - it will turn into 9<sup>th</sup> St. N.  
 - Smith Elementary will be at the top of the hill on your left

1. Provider understands that as a contracted child care provider, they are not an employee of Cherokee Nation.
2. Provider is an independent contractor and will be responsible for all applicable state and federal income tax and obligations related to payments received from the Cherokee Nation under the terms of this agreement.
3. Provider understands they are not eligible for any federal, social security, state workman's compensation or unemployment insurance benefits from the Cherokee Nation by virtue of payment received as a child care provider.
4. Provider acknowledges the receipt of a copy of the requirements for contracted licensed/unlicensed child care providers. Provider agrees that if contracted, it is the provider's responsibility to follow these requirements at all times and abide to any and all terms of this agreement.
5. Provider certifies the above information is correct to the best of their knowledge and certify their relationship as indicated. Provider understands that any false statements made on this form and/or in any other written statement, declaration, and/or background check request submitted therewith may result in prosecution for fraud or denial of contract.

Director Signature (if applicable)	Director Name (printed)	Date Signed
	Melissa Zumwalt	4/22/26
Owner/President Signature	Owner/President Name (printed)	Date Signed

**Office Use Only**

LCW:	NVD:	Date App Received:
Date Orientation Complete:	DHS CW:	Contract Start Date:
Reviewed by:	<input type="checkbox"/> Approved <input type="checkbox"/> Denied Reason for Denial:	



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(918) 458-4446 Subsidy Fax

### **DECLARATION FOR CHILD CARE PROVIDERS**

The Cherokee Nation Child Care Licensing Program requires all providers to sign a declaration before providing child care services to children and youth.

This declaration shall include all prior criminal convictions/court actions related to:

1. Child sexual abuse and their disposition,
2. Other forms of child care abuse and/or neglect,
3. The commission of felonies,
4. Drugs and alcohol,
5. Removing children from your home,
6. And/or child abuse, sexual offenses or violent felonies for which the record has been expunged, pardoned, or set aside under federal, state, or tribal law.

**This declaration may exclude:**

- Other offenses not related to child abuse and/or child sexual abuse or violent felonies committed before the prospective provider's 18<sup>th</sup> birthday, which was adjudicated in a juvenile court or under a youthful offender law.
- Other convictions not mentioned above for which the record has been expunged under federal, tribal or state law.
- Any convictions set aside under the federal youth corrections act or similar authority.

Please check the applicable statement below regarding the above criminal convictions/court actions.

I **have not** been convicted or involved in a court action that involves one or more of the six types of actions/offenses listed above.

I **have** been convicted or involved in a court action that involves one or more of the six types of actions/offenses listed above. **If you have been convicted or involved in a court action listed above, please attach information detailing the offense(s) or action, the date(s) of the conviction or action, and other relevant information.**

Melissa Zumwalt      Melissa Zumwalt      4/22/26  
Provider/Owner Signature      Provider/Owner Name (printed)      Date Signed



# Cherokee Nation Substitute Form W-9

## Request for Taxpayer Identification Number and Certification

NOTE: Your United States TAXPAYER IDENTIFICATION NUMBER MUST be provided regardless of your tax status. Name must be the same as that filed with the Internal Revenue Service (IRS) or the Social Security Administration (SSA), as applicable. Failure to return this form in a timely manner will delay the order and/or payment. The following information needs to be completed and returned to your contact person at Cherokee Nation.

PRINT OR TYPE - ALL FIELDS MUST BE COMPLETED

<b>1. LEGAL NAME</b> (As entered with IRS or SSA) If Sole Proprietorship, enter your LAST, FIRST, MI <span style="font-size: 1.2em; color: blue;">Independent School District No. 11 of Tulsa County</span>		
<b>2. TRADE NAME</b> (If doing business as (D/B/A) or business name of Sole Proprietorship) <span style="font-size: 1.2em; color: blue;">Owasso Public Schools</span>	<b>3. Exemptions</b> (Codes apply only to certain entities; not individuals) Exempt Payee code (if any) <span style="font-size: 1.2em; color: blue;">3</span> Exemption FATCA reporting Code (if any) <span style="font-size: 1.2em; color: blue;">C</span> <small>(Applies to accounts maintained outside the U.S.)</small>	
<b>4. PRIMARY ADDRESS</b> (Physical Address) Number and street <span style="font-size: 1.2em; color: blue;">1501 N. Ash St.</span> City, State, Zip + 4 <span style="font-size: 1.2em; color: blue;">OWASSO, OK 74055</span>	<b>6. Vendor Entity Type</b> (Select only one box) <input type="checkbox"/> Individual <span style="float: right;"><input type="checkbox"/> Corporation</span> <input type="checkbox"/> Sole Proprietor <span style="float: right;"><input type="checkbox"/> Limited Liability Corporation</span> <input type="checkbox"/> Partnership <span style="float: right;"><input type="checkbox"/> Professional Corporation</span> <input type="checkbox"/> Limited Liability Partnership <span style="float: right;"><input type="checkbox"/> Disregarded Entity</span> <input type="checkbox"/> Non-Profit <span style="float: right;"><input checked="" type="checkbox"/> Other</span> <input type="checkbox"/> Government	
<b>5. REMIT ADDRESS</b> (Mailing Address if different from above) PO Box or number and street City, State, Zip + 4	<b>8. Minority Certification</b> (Select all that apply and attach copy of certification) <input type="checkbox"/> Certified Indian Owned (Tribe) <span style="float: right;"><input type="checkbox"/> Female Owned</span> <input type="checkbox"/> Certified Major Cherokee Employer <span style="float: right;"><input type="checkbox"/> Other Minority Owned</span> <input type="checkbox"/> Small Disadvantage <span style="float: right;"><input checked="" type="checkbox"/> None Apply</span> <input type="checkbox"/> TERO Certified	
<b>7. CONTACT INFORMATION</b> Email Address: <span style="font-size: 1.2em; color: blue;">phillip.storm@owassops.org</span> Phone Number: <span style="font-size: 1.2em; color: blue;">918-272-5367</span> Fax Number: Contact Name: <span style="font-size: 1.2em; color: blue;">Phillip Storm</span> Contact Title: <span style="font-size: 1.2em; color: blue;">CFO</span>		
<b>9. TAXPAYER IDENTIFICATION NUMBER (TIN)</b> Federal Employer Identification No. (FEIN) <span style="font-size: 1.2em; color: blue;">73-0773051</span> OR Social Security Number (SSN)	<b>10. Purpose for W-9</b> <input type="checkbox"/> Providing Goods <span style="float: right;"><input checked="" type="checkbox"/> Receiving CN Program Assistance</span> <input type="checkbox"/> Providing Services <span style="float: right;"><input type="checkbox"/> Expense Reimbursement</span> <input type="checkbox"/> Providing Goods and Services	
<b>CERTIFICATION:</b> Under penalties of perjury, I certify that 1. The number shown on this form is my correct taxpayer identification number and that the information I provided is correct and complete; and 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and 3. I am a U.S. citizen or other U.S. person (defined in instructions); and 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.  <b>Certification instructions.</b> You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.		
Signature Title <span style="font-size: 1.2em; color: blue;">CFO</span> <span style="float: right;">Date <span style="font-size: 1.2em; color: blue;">4/22/2026</span></span> <small>Please Print</small>		
<b>FOR CN PROGRAM USE ONLY</b>	<b>FOR AP USE ONLY</b> DATE _____ VENDOR NUMBER _____ VENDOR <input type="checkbox"/> Addition <input type="checkbox"/> Change 1099 <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>FOR FR USE ONLY</b>



GWYD DJP  
CHEROKEE NATION®  
Child Care & Development

P.O. Box 948  
Tahlequah, OK 74465  
918-453-5300 Main Phone  
918-458-7616 Main Fax  
918-458-4446 Subsidy Fax

Direct Deposit ACH Application

Please Check One:  New ACH Application  Change of Financial Institution  
 Change Bank Account Number  Terminate ACH Agreement

**Child Care Provider Information**

Printed Legal Name on Bank Account: Independent School District No. 11  
Trade Name DBA (if not legal name): Owasso Public Schools  
SSN or EIN (Tax ID Number): 73-0773051 Phone Number: 918-272-5367  
Mailing Address: 1501 N. Ash St.  
City, State, Zip: Owasso OK 74055  
Email Address for Payment Notification (Required): \_\_\_\_\_

**Financial Institution Information**

Name of Financial Institution: RCB Bank  
Financial Institution Address (main branch): 11633 E 86<sup>th</sup> St. N.  
Financial Institution City, State, Zip: Owasso OK 74055  
Account Number: 00000004800  
Routing Number: 103112594  
Wayne Goff 11/3/25  
Authorized Signature on Bank Account Date

Child Care Provider must attach a notarized letter on financial institution letterhead that includes the following items below. The letter must be signed and notarized by two separate individuals. Original Documents must be mailed or dropped off at the Tahlequah Child Care office.

- account name
- account number
- routing transit number
- account type, checking or saving

Phone app verifications are not accepted. The Child Care Provider must show an authorized Cherokee Nation Child Care employee the account name, account number, routing number and whether the account is checking or saving online on a phone, tablet or computer. The ACH application must be notarized by the Cherokee Nation employee after verifying account information is accurate.

**Cherokee Nation Office Use ONLY**

Account verified by (print name): \_\_\_\_\_  
Account verified by (signature): \_\_\_\_\_ Date verified: \_\_\_\_\_  
Name of Bank Employee that Verified Account: \_\_\_\_\_



*That's my bank!*

11/13/2025

Independent School District No. 11  
1501 N Ash St  
Owasso, OK 74055

To Whom It May Concern:

This letter is in reference to your request for account confirmation from RCB Bank. The current account information is as follows:

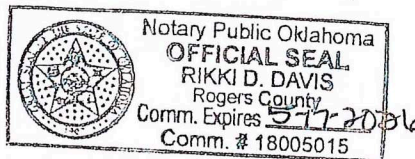
Name: Independent School District No. 11  
Account Number: 00000004800  
Routing Number: 103112594

Account Type: Checking

Thank you for choosing RCB Bank.  
Please contact me if you have any questions or concerns.

Sincerely,

Paige Wooden  
Customer Service Representative  
RCB Bank  
Office: 918.724.1414  
Fax: 918.724.1414



State of Oklahoma  
Department of Human Services

# LICENSE

SMITH ELEMENTARY-SPARK

12223 E 91st St. N

OWASSO, OK 74055

OWNER: INDEPENDENT SCHOOL DISTRICT NO. 11

is hereby issued a license to operate a

CHILD CARE PROGRAM - Out of School Time

under provisions of the Oklahoma Child Care Facilities Licensing Act, as amended, Title 10 Oklahoma Statutes Annotated Sections 401, et seq.

Total Capacity 50

License No. K830056545 Issued 01/29/2024

Meets criteria for

Three Stars ★★ ★ Effective Date: 4/25/2024



Director of Child Care Services



OKLAHOMA  
Human Services



GWYD DBP  
**CHEROKEE NATION®**  
Child Care & Development

P.O. Box 948  
Tahlequah, OK 74465  
(918) 453-5300 Main Phone  
(918) 458-7616 Main Fax  
(918) 458-4446 Subsidy Fax

**CHILD CARE AUTHORIZATION APPLICATION**

(Licensed Center or Home)

**Facility Information:**

CN ID (office use only):

Facility or Provider Name: <b>Stone Canyon Elementary - SPARK</b>		
Email: <b>melissa.zumwalt@dwagcops.org</b>		
Business Phone: <b>918-274-1901</b>	Cell Phone:	
Physical Street Address: <b>7305 N 177<sup>th</sup> E. Ave</b>	City, State, Zip: <b>DWASSO, OK 74055</b>	
Mailing Address (if different from above): <b>1501 N Ash St.</b>	City, State, Zip: <b>DWASSO, OK 74055</b>	
OKDHS License Number: <b>K8-30056544</b>	Licensed Capacity: <b>50</b>	
OKDHS Licensing Caseworker Name:	County: <b>Rogers</b>	
Type of Organization: <input type="checkbox"/> Individual/Sole Proprietor <input type="checkbox"/> Partnership <input type="checkbox"/> Corporation/Inc. <input type="checkbox"/> LLC-Limited Liability Company <input checked="" type="checkbox"/> Public School <input type="checkbox"/> Tribal <input type="checkbox"/> Other: _____		
Type of Facility: <input type="checkbox"/> Child Care Center <input type="checkbox"/> Large Family Child Care Home <input type="checkbox"/> Small Family Child Care Home <input checked="" type="checkbox"/> Before & After Care/Public School (operates year-round: <input type="checkbox"/> yes <input checked="" type="checkbox"/> no)		
Star Status (Centers must be a minimum of a Two Star to contract with Cherokee Nation for services): <input type="checkbox"/> One Star <input type="checkbox"/> Two Star <input checked="" type="checkbox"/> Three Star <input type="checkbox"/> Four Star <input type="checkbox"/> Five Star		
Ages of Children Accepted for Care: <b>4-13 years</b>	Days of Operation: <b>Mon-Fri</b>	Hours of Operation: <b>7-8:45AM ; 3:45-6 pm</b>
Director Full Name (if applicable): <b>Melissa Zumwalt</b>	Director Cell Phone: <b>918-798-2322</b>	

**Owner or President Information:**


Owner/President Full Name: <b>Melissa Zumwalt</b>	Owner/President Cell Phone: <b>918-798-2322</b>
Is the owner a member of a federally recognized tribe? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	If yes, Name of Tribe:
Tribal Registration Number (if applicable):	Owner Date of Birth: <b>11-30-1975</b>
If using Federal EIN on W-9 Form, please list here: <b>73-0773051</b>	If using Social Security Number on W-9 Form, please list here: _____

**CHILD CARE AUTHORIZATION APPLICATION**  
(Licensed Center or Home)

Please provide driving directions to the child care facility/home:

- From US Hwy 169 - northbound  
 - exit on Elm St. & head East  
 - go several miles & turn R onto 4060 Rd / 177<sup>th</sup> E Ave  
 - follow that road around & you'll see  
 Stone Canyon Elementary on your left

1. Provider understands that as a contracted child care provider, they are not an employee of Cherokee Nation.
2. Provider is an independent contractor and will be responsible for all applicable state and federal income tax and obligations related to payments received from the Cherokee Nation under the terms of this agreement.
3. Provider understands they are not eligible for any federal, social security, state workman's compensation or unemployment insurance benefits from the Cherokee Nation by virtue of payment received as a child care provider.
4. Provider acknowledges the receipt of a copy of the requirements for contracted licensed/unlicensed child care providers. Provider agrees that if contracted, it is the provider's responsibility to follow these requirements at all times and abide to any and all terms of this agreement.
5. Provider certifies the above information is correct to the best of their knowledge and certify their relationship as indicated. Provider understands that any false statements made on this form and/or in any other written statement, declaration, and/or background check request submitted therewith may result in prosecution for fraud or denial of contract.

Director Signature (if applicable)	Director Name (printed)	Date Signed
	Melissa Zumwalt	4/22/26
Owner/President Signature	Owner/President Name (printed)	Date Signed

**Office Use Only**

LCW:	NVD:	Date App Received:
Date Orientation Complete:	DHS CW:	Contract Start Date:
Reviewed by:	<input type="checkbox"/> Approved <input type="checkbox"/> Denied Reason for Denial:	



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**CHEROKEE NATION®**  
Child Care & Development

P.O. Box 948  
Tahlequah, OK 74465  
(918) 453-5300 Main Phone  
(918) 458-7616 Main Fax  
(918) 458-4446 Subsidy Fax

### DECLARATION FOR CHILD CARE PROVIDERS

The Cherokee Nation Child Care Licensing Program requires all providers to sign a declaration before providing child care services to children and youth.

This declaration shall include all prior criminal convictions/court actions related to:

1. Child sexual abuse and their disposition,
2. Other forms of child care abuse and/or neglect,
3. The commission of felonies,
4. Drugs and alcohol,
5. Removing children from your home,
6. And/or child abuse, sexual offenses or violent felonies for which the record has been expunged, pardoned, or set aside under federal, state, or tribal law.

**This declaration may exclude:**

- Other offenses not related to child abuse and/or child sexual abuse or violent felonies committed before the prospective provider's 18<sup>th</sup> birthday, which was adjudicated in a juvenile court or under a youthful offender law.
- Other convictions not mentioned above for which the record has been expunged under federal, tribal or state law.
- Any convictions set aside under the federal youth corrections act or similar authority.

Please check the applicable statement below regarding the above criminal convictions/court actions.

I **have not** been convicted or involved in a court action that involves one or more of the six types of actions/offenses listed above.

I **have** been convicted or involved in a court action that involves one or more of the six types of actions/offenses listed above. **If you have been convicted or involved in a court action listed above, please attach information detailing the offense(s) or action, the date(s) of the conviction or action, and other relevant information.**

*Melissa Zumwalt*      Melissa Zumwalt      4/22/20  
Provider/Owner Signature      Provider/Owner Name (printed)      Date Signed



# Cherokee Nation Substitute Form W-9

## Request for Taxpayer Identification Number and Certification

NOTE: Your United States TAXPAYER IDENTIFICATION NUMBER MUST be provided regardless of your tax status. Name must be the same as that filed with the Internal Revenue Service (IRS) or the Social Security Administration (SSA), as applicable. Failure to return this form in a timely manner will delay the order and/or payment. The following information needs to be completed and returned to your contact person at Cherokee Nation.

PRINT OR TYPE - ALL FIELDS MUST BE COMPLETED

<b>1. LEGAL NAME</b> (As entered with IRS or SSA) If Sole Proprietorship, enter your LAST, FIRST, MI <span style="font-size: 1.2em; color: blue;">Independent School District No. 11 of Tulsa County</span>		
<b>2. TRADE NAME</b> (If doing business as (D/B/A) or business name of Sole Proprietorship) <span style="font-size: 1.2em; color: blue;">Owasso Public Schools</span>	<b>3. Exemptions</b> (Codes apply only to certain entities; not individuals) Exempt Payee code (if any) <span style="font-size: 1.2em; color: blue;">3</span> Exemption FATCA reporting Code (if any) <span style="font-size: 1.2em; color: blue;">C</span> <small>(Applies to accounts maintained outside the U.S.)</small>	
<b>4. PRIMARY ADDRESS</b> (Physical Address) Number and street <span style="font-size: 1.2em; color: blue;">1501 N. Ash St.</span> City, State, Zip + 4 <span style="font-size: 1.2em; color: blue;">OWASSO, OK 74055</span>	<b>6. Vendor Entity Type</b> (Select only one box) <input type="checkbox"/> Individual <span style="float: right;"><input type="checkbox"/> Corporation</span> <input type="checkbox"/> Sole Proprietor <span style="float: right;"><input type="checkbox"/> Limited Liability Corporation</span> <input type="checkbox"/> Partnership <span style="float: right;"><input type="checkbox"/> Professional Corporation</span> <input type="checkbox"/> Limited Liability Partnership <span style="float: right;"><input type="checkbox"/> Disregarded Entity</span> <input type="checkbox"/> Non-Profit <span style="float: right;"><input checked="" type="checkbox"/> Other</span> <input type="checkbox"/> Government	
<b>5. REMIT ADDRESS</b> (Mailing Address if different from above) PO Box or number and street City, State, Zip + 4	<b>8. Minority Certification</b> (Select all that apply and attach copy of certification) <input type="checkbox"/> Certified Indian Owned (Tribe) <span style="float: right;"><input type="checkbox"/> Female Owned</span> <input type="checkbox"/> Certified Major Cherokee Employer <span style="float: right;"><input type="checkbox"/> Other Minority Owned</span> <input type="checkbox"/> Small Disadvantage <span style="float: right;"><input checked="" type="checkbox"/> None Apply</span> <input type="checkbox"/> TERO Certified	
<b>7. CONTACT INFORMATION</b> Email Address: <span style="font-size: 1.2em; color: blue;">phillip.storm@owassops.org</span> Phone Number: <span style="font-size: 1.2em; color: blue;">918-272-5367</span> Fax Number: Contact Name: <span style="font-size: 1.2em; color: blue;">Phillip Storm</span> Contact Title: <span style="font-size: 1.2em; color: blue;">CFO</span>		
<b>9. TAXPAYER IDENTIFICATION NUMBER (TIN)</b> Federal Employer Identification No. (FEIN) <span style="font-size: 1.2em; color: blue;">73-0773051</span> OR Social Security Number (SSN)	<b>10. Purpose for W-9</b> <input type="checkbox"/> Providing Goods <span style="float: right;"><input checked="" type="checkbox"/> Receiving CN Program Assistance</span> <input type="checkbox"/> Providing Services <span style="float: right;"><input type="checkbox"/> Expense Reimbursement</span> <input type="checkbox"/> Providing Goods and Services	
<b>CERTIFICATION:</b> Under penalties of perjury, I certify that: 1. The number shown on this form is my correct taxpayer identification number and that the information I provided is correct and complete; and 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and 3. I am a U.S. citizen or other U.S. person (defined in instructions); and 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.  <b>Certification instructions.</b> You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.		
Signature Title <span style="font-size: 1.2em; color: blue;">CFO</span> <span style="float: right;">Date <span style="font-size: 1.2em; color: blue;">4/22/2026</span></span> <small>Please Print</small>		
<b>FOR CN PROGRAM USE ONLY</b>	<b>FOR AP USE ONLY</b> DATE _____ VENDOR NUMBER _____ VENDOR <input type="checkbox"/> Addition <input type="checkbox"/> Change 1099 <input type="checkbox"/> Yes <input type="checkbox"/> No	<b>FOR FR USE ONLY</b>



GWYJ DJP  
**CHEROKEE NATION<sup>®</sup>**  
Child Care & Development

P.O. Box 948  
Tahlequah, OK 74465  
918-453-5300 Main Phone  
918-458-7616 Main Fax  
918-458-4446 Subsidy Fax

Direct Deposit ACH Application

Please Check One:  New ACH Application  Change of Financial Institution  
 Change Bank Account Number  Terminate ACH Agreement

**Child Care Provider Information**

Printed Legal Name on Bank Account: Independent School District No. 11  
Trade Name DBA (if not legal name): Owasso Public Schools  
SSN or EIN (Tax ID Number): 73-0773051 Phone Number: 918-272-5367  
Mailing Address: 1501 N. Ash St.  
City, State, Zip: Owasso OK 74055  
Email Address for Payment Notification (Required): \_\_\_\_\_

**Financial Institution Information**

Name of Financial Institution: RCB Bank  
Financial Institution Address (main branch): 11633 E 86<sup>th</sup> St. N.  
Financial Institution City, State, Zip: Owasso OK 74055  
Account Number: 00000004800  
Routing Number: 103112594  
Joseph Goyf 11/13/25  
Authorized Signature on Bank Account Date

Child Care Provider must attach a notarized letter on financial institution letterhead that includes the following items below. The letter must be signed and notarized by two separate individuals. Original Documents must be mailed or dropped off at the Tahlequah Child Care office.

- account name
- account number
- routing/transit number
- account type, checking or saving

Phone app verification is not accepted. The Child Care Provider must show to a Notarized Cherokee Nation Child Care employee the account name, account number, routing number and whether the account is checking or savings and if their phone, tablet or smartphone. The ACH application must be notarized by the Cherokee Nation employee after verifying account information is accurate.

**Cherokee Nation Office Use ONLY**

Account verified by (print name): \_\_\_\_\_  
Account verified by (signature): \_\_\_\_\_ Date verified: \_\_\_\_\_  
Name of Bank Employee that Verified Account: \_\_\_\_\_



*That's my bank!*

11/13/2025

Independent School District No. 11  
1501 N Ash St  
Owasso, OK 74055

To Whom It May Concern:

This letter is in reference to your request for account confirmation from RCB Bank. The current account information is as follows:

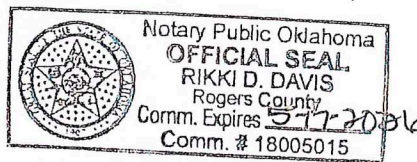
Name: Independent School District No. 11  
Account Number: 00000004800  
Routing Number: 103112594

Account Type: Checking

Thank you for choosing RCB Bank.  
Please contact me if you have any questions or concerns.

Sincerely,

Paige Wooden  
Customer Service Representative  
RCB Bank  
Office: 918.724.1414  
Fax: 918.724.1414



State of Oklahoma  
Department of Human Services

# LICENSE

STONE CANYON ELEMENTARY-SPARK

7305 N 177th E Ave

OWASSO, OK 74055

OWNER: INDEPENDENT SCHOOL DISTRICT NO. 11

is hereby issued a license to operate a

CHILD CARE PROGRAM - Out of School Time

under provisions of the Oklahoma Child Care Facilities Licensing Act, as amended, Title 10 Oklahoma Statutes Annotated Sections 401, et seq.

Total Capacity 60

License No. K830056544 Issued 01/31/2024

Meets criteria for

Three Stars ★★ ★ Effective Date: 4/18/2024

*Jaezra Adams*

Director of Child Care Services



OKLAHOMA  
Human Services



Ignite the power of literacy

# Quote

**Prepared For**

Leslie Wright  
(OK) Owasso Public Schools

<b>Date:</b>	Apr 21, 2026
<b>Valid Until:</b>	Jul 16, 2026
<b>Quote ID:</b>	Q-12448
<b>Sales Rep:</b>	Jenny Christensen

**Shipping Information:**

**Delivery Contact:** Leslie Wright  
**Phone:** +19182725367  
**Email:** leslie.wright@owassops.org  
**Address:**  
(OK) Owasso Public Schools  
1501 North Ash Street,  
Owasso, OK 74055

**Billing Information:**

**Billing Contact:** Leslie Wright  
**Phone:** +19182725367  
**Email:** leslie.wright@owassops.org  
**Address:**  
(OK) Owasso Public Schools  
1501 North Ash Street,  
Owasso, OK 74055

## 1. Professional Development- Year 1

SKU	Item Name	List Unit Price	Quantity	List Price	Net Price
26_PREMIER_PD	Premier - Professional Development Training Package	\$4,500.00	1	\$4,500.00	\$4,500.00
26_COACHING	Literacy Coaching Package	\$4,000.00	1	\$4,000.00	\$4,000.00
				<b>Total List Price</b>	<b>\$8,500.00</b>
				<b>Total Net Price</b>	<b>\$8,500.00</b>

**Grand Total**

Line Item	Totals
Total List Price	\$8,500.00
<b>Total Net Price</b>	<b>\$8,500.00</b>

**NOTE:** Sales Tax will be calculated on the invoice unless a tax exemption certificate is on file.

**Terms of Service:**

- Quote period: Jul 1, 2026 through Jun 30, 2027

If you are paying by purchase order (PO), please reference the **Quote ID number** on your PO and email both the **PO and the quote** to the RGR sales representative who has been assisting you with this order.

If you are paying by **check or money order**, please mail your payment along with a copy of your **final quote** to:  
Really Great Reading Company | PO Box 46 | Cabin John, MD 20818




- Teacher and Student digital school year subscription terms of service begin July 1 and run through June 30th the following year.
- Professional Development services quoted for each school year may be used during the school year quoted for and expire on June 30 of that school year. There is no rollover of Professional Development Services to a subsequent year.
- Physical materials may ship annually. Intended delivery schedule will be provided with submission of purchase order/contract.
- All services provided by Really Great Reading are subject to our general Terms of Service available at <https://www.reallygreatreading.com/terms-of-service>. By accepting this quote and with submission of a purchase order, you agree to be bound by our Terms of Service.

**Items & Pricing**

- The price offered is contingent upon your acceptance of the entire quote and its Terms & Conditions, as evidenced with the submission of a purchase order signed by an authorized agent for all years in the quoting period. This price is valid only for the duration specified in the quote and is subject to change if any modifications or amendments are made to the agreement.
- The issuance of an authorized purchase order with confirmed item(s), quantity and amount is required before delivery of materials, licenses and/or services.
- Plus applicable sales tax, to be added at the time of invoice.

**Billing & Payment Terms**

- Billing schedule: One-time
- Payment Terms: Net 30

Really Great Reading	
Name	Jenny Christensen
Title	Success - Paid Seat
Signature	
Date	Apr 21, 2026 9:45:40 AM UTC-0500

(OK) Owasso Public Schools	
Name	
Title	
Signature	
Date	

---

If you are paying by purchase order (PO), please reference the **Quote ID number** on your PO and email both the **PO and the quote** to the RGR sales representative who has been assisting you with this order.

If you are paying by **check or money order**, please mail your payment along with a copy of your **final quote** to:  
Really Great Reading Company | PO Box 46 | Cabin John, MD 20818





## Solution Tree Purchase Agreement

Effective as of the last date of signature below, Solution Tree Inc. (“Solution Tree”), located at 555 N. Morton St., Bloomington, IN 47404, and Owasso Public Schools (“Customer”), located at 1501 N. Ash St. Owasso, OK 74055, agree as follows:

1. **Purchase Summary:** Customer will purchase and Solution Tree will provide the products and services described below. Customer will provide Solution Tree with a purchase order for the full amount due under this Agreement, including any applicable taxes. All payments will be due net 30 days from actual date of invoice with all past due invoices subject to monthly finance charges as allowed by law.

Description	Payment	Expected Invoice Date
Professional Development Services (Non-refundable 20% Deposit)	\$0.00	Waived
Professional Development Services (Remainder)	\$17,000.00	Incrementally after each date
<b>Total</b>	<b>\$17,000.00</b>	

2. **Professional Development Services:** Solution Tree agrees to provide a presenter, Julie Schmidt, to disseminate information for Customer on the topic of *PLC at Work®* on September 2, 2026 to September 3, 2026. Except for any pre-printed binders or other materials Solution Tree provides, Customer will reproduce any handouts and other print materials related to the services. Customer will provide a venue, audio/video equipment, and technical support capable of receiving and displaying all onsite or virtual sessions.

### 3. General Terms

- 3.1. **Intellectual Property:** Customer acknowledges that all tangible or electronic presentation materials, handouts, and/or program books used in conjunction with services performed under this Agreement are pre-existing and that no materials will be developed specifically for Customer. All previously owned rights will be retained, and Customer may not reproduce any materials not designated reproducible without express written permission. All audio, video, and digital recording of the services by Customer is prohibited.
- 3.2. **Authorization:** Customer warrants that it has gone through all required approval and procurement processes related to a purchase of this size and that Customer’s signatory has the authority to bind Customer to the terms of this Agreement.
- 3.3. **Force Majeure:** If an event beyond the parties’ control makes performance impossible, illegal, or commercially impracticable by preventing services from occurring as scheduled, the parties will use best efforts to reschedule or make substitutions for affected services or products. If performance is prevented entirely, neither party will have any further liability to the other party for the prevented performance. All unaffected obligations will remain in place.



- 3.4. Termination:** Solution Tree may terminate this Agreement if Customer does not provide a purchase order at least 30 days before the first scheduled date. If Customer seeks to cancel any services within 90 days of the scheduled date for any reason but Force Majeure and Solution Tree agrees to such cancellation, Customer will reimburse Solution Tree for any reasonable business expenses incurred in anticipation of performance of this Agreement that exceed the amount of the deposit.
- 3.5. Entire Agreement:** This Agreement, any purchase orders issued pursuant to this Agreement, any RFP in place between the parties, any other written agreement executed by the parties for the same services included in this Agreement, and any exhibits attached hereto constitute the entire agreement of the parties and supersede any prior or contemporaneous written or oral understanding or agreement. No waiver or modification of any of the terms of the Agreement will be effective unless made in writing and signed by both parties, and the unenforceability, invalidity, or illegality of any provision of this Agreement will not render the other provisions unenforceable, invalid, or illegal. Any waiver by either party of any default or breach hereunder will not constitute a waiver of any provision of this Agreement or of any subsequent default or breach of the same or a different kind.

This Agreement is acknowledged and accepted by Customer and Solution Tree:

By: \_\_\_\_\_  
 Name: \_\_\_\_\_ Date \_\_\_\_\_  
 Title: \_\_\_\_\_  
 Entity: Owasso Public Schools

Signed by:  
  
 AC5A6CA77B4C485... 4/22/2026  
 By: \_\_\_\_\_ Date \_\_\_\_\_  
 Sarah Thompson  
 VP of Solution Design and Contract Management  
 Solution Tree, Inc



## Solution Tree Purchase Agreement

Effective as of the last date of signature below, Solution Tree Inc. (“Solution Tree”), located at 555 N. Morton St., Bloomington, IN 47404, and Owasso Public Schools (“Customer”), located at 1501 N. Ash St. Owasso, OK 74055, agree as follows:

1. **Purchase Summary:** Customer will purchase and Solution Tree will provide the products and services described below. Customer will provide Solution Tree with a purchase order for the full amount due under this Agreement, including any applicable taxes. All payments will be due net 30 days from actual date of invoice with all past due invoices subject to monthly finance charges as allowed by law.

Description	Payment	Expected Invoice Date
Professional Development Services (Non-refundable 20% Deposit)	\$0.00	Waived
Professional Development Services (Remainder)	\$17,000.00	Incrementally after each date
<b>Total</b>	<b>\$17,000.00</b>	

2. **Professional Development Services:** Solution Tree agrees to provide a presenter, Julie Schmidt, to disseminate information for Customer on the topic of *All Means All* on August 31, 2026 to September 1, 2026. Except for any pre-printed binders or other materials Solution Tree provides, Customer will reproduce any handouts and other print materials related to the services. Customer will provide a venue, audio/video equipment, and technical support capable of receiving and displaying all onsite or virtual sessions.

### 3. General Terms

- 3.1. **Intellectual Property:** Customer acknowledges that all tangible or electronic presentation materials, handouts, and/or program books used in conjunction with services performed under this Agreement are pre-existing and that no materials will be developed specifically for Customer. All previously owned rights will be retained, and Customer may not reproduce any materials not designated reproducible without express written permission. All audio, video, and digital recording of the services by Customer is prohibited.
- 3.2. **Authorization:** Customer warrants that it has gone through all required approval and procurement processes related to a purchase of this size and that Customer’s signatory has the authority to bind Customer to the terms of this Agreement.
- 3.3. **Force Majeure:** If an event beyond the parties’ control makes performance impossible, illegal, or commercially impracticable by preventing services from occurring as scheduled, the parties will use best efforts to reschedule or make substitutions for affected services or products. If performance is prevented entirely, neither party will have any further liability to the other party for the prevented performance. All unaffected obligations will remain in place.



**3.4. Termination:** Solution Tree may terminate this Agreement if Customer does not provide a purchase order at least 30 days before the first scheduled date. If Customer seeks to cancel any services within 90 days of the scheduled date for any reason but Force Majeure and Solution Tree agrees to such cancellation, Customer will reimburse Solution Tree for any reasonable business expenses incurred in anticipation of performance of this Agreement that exceed the amount of the deposit.

**3.5. Entire Agreement:** This Agreement, any purchase orders issued pursuant to this Agreement, any RFP in place between the parties, any other written agreement executed by the parties for the same services included in this Agreement, and any exhibits attached hereto constitute the entire agreement of the parties and supersede any prior or contemporaneous written or oral understanding or agreement. No waiver or modification of any of the terms of the Agreement will be effective unless made in writing and signed by both parties, and the unenforceability, invalidity, or illegality of any provision of this Agreement will not render the other provisions unenforceable, invalid, or illegal. Any waiver by either party of any default or breach hereunder will not constitute a waiver of any provision of this Agreement or of any subsequent default or breach of the same or a different kind.

This Agreement is acknowledged and accepted by Customer and Solution Tree:

By: \_\_\_\_\_  
Name: \_\_\_\_\_ Date \_\_\_\_\_  
Title: \_\_\_\_\_  
Entity: Owasso Public Schools

Signed by:   
AC5A6CA77B4C485... 4/27/2026  
By: Sarah Thompson Date \_\_\_\_\_  
VP of Solution Design and Contract Management  
Solution Tree, Inc



Literacy Resources, LLC (dba Heggerty)  
Chicago, IL  
Phone: (708) 366-5947

**ORDER for Owasso Public Schools**  
Order: SO-260420-0220874  
Order Date: 7/17/2026  
Valid Through: 9/4/2026  
Prepared by: Masyn Glenn

## Order

### Address Information

**Bill To:**

Owasso Public Schools  
1501 North Ash Street  
Owasso, OK 74055  
United States

**Ship To:**

Owasso Public Schools  
1501 North Ash Street  
Owasso, OK 74055  
United States

**Account Name:** Owasso Public Schools

**Billing Contact:** Ashley Hearn

**Billing Email:** ashley.hearn@owassops.org

**Billing Phone:** 918-272-8182

### Terms and Conditions

**Payment Method:** Invoice

**Payment Terms:** Due Upon Receipt

**Delivery Terms:** FOB Origin

**Billing Method:** Email

### Remittance Information

**Remit To:**

Literacy Resources, LLC (dba  
Heggerty)  
PO Box 7143  
Carol Stream, IL 60197-7143  
USA

**Wire Transfer To:**

**Bank Name:** Wheaton Bank and Trust

**Account Name:** Literacy Resources, LLC

**A/C Number:** 2914592467

**ABA Number:** 071925389

**SWIFT Code:** WBTCUS44

Please reference order number SO-260420-0220874 with your payment.

### Product & Service Lines

Product/Service	Product Code	Description	Date(s)	Quantity	Term	Sales Price	Amount
Phonemic Awareness Introduction: Kindergarten & Primary In-Person Full Day Intro		(Preferred Date: 9/15/2026, 9:00 AM)	9/15/2026 - 9/15/2026	1	1 Day	\$5,000.00	\$5,000.00

### Additional Charges/Credits

Additional Charge/Credit	Date	Quantity	Unit Price	Amount
Tax	4/20/2026	1	\$0.00	\$0.00
Shipping	4/20/2026	1	\$0.00	\$0.00

Services Total: \$5,000.00

Additional Charges/Credits Total: \$0.00

Net Amount: \$5,000.00

**Balance Due Amount: \$5,000.00**

+ The unit price shown above has been rounded to two decimal places for display purposes.

**Comments**

To make payment by credit card go to: <https://shop.heggerty.org/pay/a1IPq00000AFxWfMAL/>  
<https://heggerty.org/terms-of-service/> (If clicking the link doesn't work, please copy and paste it into your browser.)

**Customer: Owasso Public Schools**

**Literacy Resources, LLC**

Signature \_\_\_\_\_

Signature *Kimberly Greene* \_\_\_\_\_

Name \_\_\_\_\_

Name Kimberly Greene \_\_\_\_\_

Title \_\_\_\_\_

Title PD Operations Manager \_\_\_\_\_

Date \_\_\_\_\_

Date 4.23.2026 \_\_\_\_\_

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2026-2027

**LEGAL CONTRACT  
BETWEEN OWASSO PUBLIC SCHOOLS AND  
SUPERIOR VISION CONSULTING, LLC**

This agreement is entered into between OWASSO Public Schools and Superior Vision Consulting, LLC/Cindy Lumpkin, a teacher certified to teach students with visual impairments, for providing consultant services to Owasso Public Schools.

**I. Terms**

- A. Cindy Lumpkin shall maintain Oklahoma State Department of Education certification as a teacher of children with visual impairments.
- B. Superior Vision Consulting/Cindy Lumpkin shall provide direct or consult services for children with visual disabilities as requested by the director of special services. Services may include: Braille instruction, JAWS/technology training, ordering equipment, meeting with the teachers and parents, reviewing student files, observing students in class, attending IEP meetings, writing portions of IEP, and Functional Vision Assessments. Services will be scheduled as feasible for the consultant and the school.

**II. Consideration and Cost of Services**

- A. The Owasso Public Schools shall pay Superior Vision Consulting \$80.00 per hour, port to port, for the hours served for the length of this agreement.
- B. Superior Vision Consulting will submit a bill by the 1st of each month to Owasso Public Schools for services provided.

**III. Duration of the Contract**

The duration of this contract is to become effective August 1, 2026 and terminate June 30, 2027 with the Board of Education approval.

**IV. This contract is subject to termination upon 60 (sixty days) advance written notice by either party. Said written notice must be forwarded by certified mail.**

**V. Amendment**

This contract is subject to amendments at any time, but only upon fully disclosed written consent and approval by both parties.

Owasso Public Schools \_\_\_\_\_ Date \_\_\_\_\_

Board President

Cindy Lumpkin, CTVI Cindy Lumpkin Date 4/28/26  
Superior Vision Consulting, LLC

## MEMORANDUM OF UNDERSTANDING

### Transition Work Adjustment Program 2026-2027 Among Goodwill Industries of Tulsa, Inc. and Owasso Public Schools

This Memorandum of Understanding (MOU) is hereby entered into between Goodwill Industries of Tulsa, Inc. (Goodwill) and Owasso Public Schools (OPS).

Goodwill Industries of Tulsa, Inc.  
Robert Stape, MBA  
President and Chief Executive Officer  
2800 Southwest Blvd.  
Tulsa, OK 74107  
Robert.Stape@goodwilltulsa.org

Owasso Public Schools  
Attn: Charlene Duncan  
Director of Special Services  
1501 N. Ash St.  
Owasso, OK 74055  
Charlene.Duncan@OwassoPS.org

Goodwill and OPS agree that selected OPS students will receive Transition Services through the State of Oklahoma Department of Rehabilitation Services (DRS) Work Adjustment Training (WAT) program. Goodwill offers this MOU for the WAT Program to benefit students with disabilities.

**MOU Period:** The MOU is effective from the execution date through June 30, 2027.

#### **Students Eligible to Participate:**

- With documented disabilities and have been determined eligible for DRS services or are on a trail work plan.
  - Have an approved DRS case.
  - Have an individualized plan for employment (IPE) in place.
  - Have WAT as a line of service on the IPE.
  - Have been provided with written authorization by DRS as to their start date; and
  - Are at least 16 years old.

#### **Goodwill Eligibility Criteria:**

- Students who meet all DRS criteria listed above.
- Those who demonstrate the potential to work in the community after the WAT Program, with the assistance of Supported Employment.
- Those who have been interviewed by Goodwill staff and accepted based on documented eligibility criteria, assessment results, and program capacity.

#### **Goodwill Responsibilities:**

##### Objectives/Outcomes of WAT

- Students will demonstrate knowledge of workplace expectations, job roles, and fundamental employment concepts, including attendance, communication, and task completion/stamina.
- Students will demonstrate job-seeking skills.
- Students will develop workplace-appropriate social interaction skills, including professional communication, teamwork, and adherence to workplace behavioral expectations.
- Students will demonstrate employment readiness skills.
- Students will transition into employment (e.g., School Work Study, Supported Employment, and Employment and Retention) or post-secondary education.
- Staff will evaluate each student's ability to sustain work-related tasks based on observable performance criteria and documented assessment.

### Individualized Assessment

- Students' interpersonal skills will be evaluated as demonstrated through structured assessment tools and documented observation.
- Capacity to understand verbal and written communications.
- Job skills, including the ability to meet both the physical and social aspects of employment.
- Work speed and endurance.
- Career interest and awareness.
- Work behaviors, which include the ability to work independently.
- Physical capacities and psychomotor skills.
- Job shadowing assesses an individual's job interests and allows students to ask questions regarding specific jobs. For students with sensory issues, the opportunity to assess and learn to regulate possible sensory input.

### Individualized Training Plan

Goodwill will provide each student with an Individualized Training Plan (ITP), with input from the student, the student's family members or representative, the DRS counselor, and Goodwill WAT staff. Based on the individual assessment, ITP will address areas of strength and needed services and provide the basis for periodic evaluation of the student's progress.

### Times of Service

The WAT program is offered Monday through Friday from 8:00 am to 11:00 am or 12:00 pm to 3:00 pm. Scheduled breaks will be provided during program hours. Our primary location for these classes will be at 2800 Southwest Boulevard. Classes at this location will be filled first. Additional students will be accommodated at Goodwill's Tulsa facility if there is an overflow due to high participation. Any day Goodwill is scheduled to be closed will be communicated in advance when possible.

### **Owasso Public Schools Responsibilities:**

#### Referrals of Eligible Students

- OPS and DRS will collaborate to provide eligible student referrals to Goodwill's WAT Program.

#### Transportation

- OPS will provide transportation to and from Goodwill to attend programming.
- Any alternative arrangements need to be pre-approved in writing by Goodwill's designated program administrator.

#### Meetings

- Provide written notification within five (5) business days of any IEP changes impacting participation.
- Include Goodwill WAT staff in the exit IEP.

### **Modification**

This MOU may be modified only by the written agreement of both parties.

### **Insurance**

Goodwill agrees to maintain general liability insurance on itself and cover each employee that provides services with minimum limits of \$1,000,000 per occurrence and \$3,000,000 annual aggregate. Goodwill will also maintain workers' compensation insurance covering any employee providing services hereunder in the amounts required by Oklahoma law.

### **Relationship of the Parties**

As this MOU outlines, the parties' relationship is between the contractor and the independent contractor. Nothing in this MOU is intended nor shall it be construed as creating any partnership, joint venture, or agency relationship between the parties. Neither Goodwill nor its employees or agents shall in any way be deemed to be employees or agents of OPS. Likewise, neither OPS nor its employees or agents shall be considered employees or agents of Goodwill. Each party shall be solely responsible for the method and way it and its respective employees carry out the duties imposed on it by this MOU. Neither party shall exercise any control or direction over the methods by which the other party and its respective employees perform their functions hereunder, except as may otherwise be provided in the MOU.



**State of Oklahoma  
Department Of Rehabilitation Services  
Transition School-to-work: Work Study**

This agreement, consisting of sixteen (16) pages (the "Contract"), is hereby made between the Oklahoma Department of Rehabilitation Services ("DRS") and

**Owasso Public Schools  
1501 N. Ash  
Owasso OK 74055-4920**

("Contractor" or "School") and constitutes the entire agreement between the DRS and the Contractor, and no other representations are given or should be implied from written or oral agreements or negotiations that preceded the Contract.

**RECITALS**

**WHEREAS**, the Oklahoma Department of Rehabilitation Services is authorized to make and enter into all contracts necessary or incidental to the performance of its duties, and may purchase or lease equipment, furniture, materials and supplies, and incur such other expenses as may be necessary to maintain and operate the Department, 74 O.S. § 166.1.C; and

**WHEREAS**, the Individuals with Disabilities Education Act (IDEA) and the Rehabilitation Act both provide for transition services for children with disabilities to facilitate the child's movement from school to post-school activities including employment, 20 U.S.C. § 1401(34) and 29 U.S.C. § 721(a)(11)(D); and

**WHEREAS**, the Oklahoma Department of Rehabilitation Services is authorized by rules promulgated by the Oklahoma Commission for Rehabilitation Services at Subchapter 7 of Chapter 10 of Title 612 of the Oklahoma Administrative Code to implement the Transition from School-to- Work Program; and

**WHEREAS**, in the School-to-Work program, there are many services needed. Some of these services are provided by the school under the individualized education plan (IEP) and some are provided by the Oklahoma Department of Rehabilitation Services under the individualized plan for employment (IPE). Other services may be provided by the parents, Career Tech, and others. A major component of the Transition School-to-Work program is work-readiness training and work experience. The work experience can be provided through Work Adjustment Training or the three types of Work Study Programs.

**NOW THEREFORE**, the parties agree as follows:

**I. Contract Period**

The Contract is effective from the latest date of signature of both parties or October 1, 2026, whichever is the latter, through September 30, 2027.

## I. Contract Services

**Students eligible to participate in Work Study (School Work Study, Worksite Learning, Employer Work Study) include those:**

- with documented disabilities (includes IEP, 504 Plan, or other documents), who have been determined eligible for DRS services or are on a trial work plan as determined by the DRS counselor;
- with an approved DRS case;
- with an individualized plan for employment (IPE) in place;
- with School Work Study (SWS) as a line of service on the IPE;
- who are at least sixteen (16) years of age; and
- who are attending high school.

All students participating in Work Study shall be DRS clients.

Students participating in Work Study may do so for **no more than 24 cumulative months**, as authorized in the form of Authorization(s) for Purchase(s) provided by the DRS counselors prior to the students starting work. In order for the School to be reimbursed for wages paid to a student participating in School Work Study and/or Worksite Learning, the School must have received authorization in the form of an Authorization for Purchase from the DRS counselor prior to the student starting work.

The months do not need to be consecutive. Based on individual needs and barriers due to disability, there may be exceptions where the student requires more time to make additional progress. In that instance, the DRS counselor may authorize additional time. Summer months spent in Work Study count in the 24 cumulative months. Transportation, scheduling, administrative or family convenience, or family/individual income needs are not acceptable reasons to extend Work Study beyond 24 cumulative months.

Participating students may work **no more than 15 cumulative hours per week during the school year** (i.e., during the day, evenings, weekends, or holidays). In each of the cases described above, the students **must** be given school credit for their participation during the school day, and the School staff and the DRS counselor will provide important guidance and instructional help around the work experience. If the student works after school hours, in the evening or on weekends, the School may also choose to give the student school credit and is encouraged to do so to support earning elective credits. The School will provide staff to work with the DRS counselor in the area of transition. The School will have at least one (1) person designated to serve as the “teacher/transition coordinator”. Paraprofessionals could serve as transition coordinator or could also be assigned to help with the process and documentation. The School agrees to provide designated staff time for performing the needed duties related to transition. The School agrees to fully inform the staff responsible for carrying out the duties set forth in the Contract. This includes providing all necessary staff with a copy of the Contract.

Students wishing to continue working through the summer as part of Transition School-To-Work: Work Study may do so if the School has a current contract in place.

During the school year - The maximum number of hours worked per student that is reimbursable by the DRS **cannot** exceed 15 cumulative hours per week during the school year. The DRS will reimburse 100% of the wages paid by the School for a maximum 15 cumulative hours per week

During the summer months - The maximum number of hours worked may exceed 15 cumulative hours and no more than 20 per week for summer work only when pre-approved by the DRS counselor. The DRS will reimburse 100% of the wages paid by the School for a maximum 20 cumulative hours per week. Students may work a maximum 20 cumulative hours per week beginning with the first day of summer break. However, upon the first day back to school, the students must go back to working no more than a maximum 15 cumulative hours per week. All Child Labor Laws apply and must be adhered to.

<https://www.dol.gov/general/topic/youthlabor>

**The School is required to continue supervising, monitoring, and reporting on students working in the School or in the community during the summer.**

Paid work positions must reflect **real work/jobs** and include tasks that would normally be a function of that position. The students must be learning skills that will transfer to competitive, integrated employment in the community. Classroom instructional time does not count as work. The School must ensure that students have access to a wide variety of work/job types and must also ensure the School has enough work to cover the number of students intended to participate in the program. Examples of work/jobs within the School include, but are not limited to, the following:

- office assistant/mail clerk - deliver mail/messages, stamping, sealing, organizing, cleaning, stocking, inventory, ordering, shredding, answering phones, making ID badges, laminating, taking messages, greeting visitors;
- transportation assistant - cleaning buses inside and out, light vehicle maintenance, checking fluids, tire pressure, assisting with trip tickets, cleaning bus barn;
- teacher's aide - reading to groups/individuals, cleaning, organizing, light grading, bulletin boards, listening to students read, engage students in activities, shredding, making copies;
- custodial -operating electric floor cleaning machines, simple maintenance, taking out trash, cleaning classrooms, sanitizing, dusting lockers and trophy cases, cleaning windows, restocking bathrooms, vacuuming rugs;
- manager of sports team - scorekeeping, ordering, inventory, hauling/moving equipment, washing towels, preparing water jugs and equipment for practices and games;
- information technology assistant - using compressed air to clean computers and keyboards; replacing batteries, mice and keyboards; cleaning monitors; deliveries to students and/or teachers; organizing order tickets;
- clerk in school store or coffee/snack cart - greeting, stocking, inventory, organizing, ordering, taking orders, filling orders, taking money and making change, cleaning, making displays;

- cafeteria assistant - wiping down tables, taking out trash, loading dishes, preparing food and utensils, stocking, serving, organizing;
- library aide - greeting, accepting books, checking books out, shelving books, research, cleaning, organizing, doing displays, answering phones; and
- landscaping/maintenance - mowing, weed eating, edging, pulling weeds, cleaning up flower beds, planting flower beds, selecting flowers/plants, planting in flower beds, trimming trees/shrubs, raking and bagging leaves, picking up trash from parking lot or around school grounds, light repairs on school properties, such as replacing light bulbs, painting, exterminating pests, etc.

The same guidelines should be adhered to when selecting community placements for paid work experiences.

In the final nine (9) months of the student's Work Study (School Work Study, Worksite Learning, Employer Work Study), the student must work for an employer outside of the school or school district, unless otherwise approved by the DRS counselor.

Students may not work in their family-owned business unless approved by the DRS counselor. This includes farms and other businesses.

Participation in School Work Study and/or Worksite Learning is limited to students who are **actively enrolled in high school and eligible for transition services**. Upon graduation with **either a standard diploma or an alternate diploma (OAAP)** and official exit from the school district, students receiving services under this Contract must cease work on the last day of the school year. Participation in these programs may not continue beyond the student's high school exit.

## A. Work Study Program

There are two types of Work Study through DRS:

1. School Work Study (SWS) allows students with disabilities to **work on the School campus**. The students are supervised or closely monitored by School personnel, and the School pays the students a wage, with the **DRS making reimbursement to the School** for that payment. The **School maintains liability** for the students while working on campus.
2. Worksite Learning allows students with disabilities to **work in the community**. The students are supervised or closely monitored by School personnel, and the School pays the students a wage, with the **DRS making reimbursement to the School** for that payment. The **School maintains liability** for the students while working off campus.

## B. Other Work Opportunities

This is not a Work Study through DRS:

1. Employer Work Study allows students with disabilities employment experience in **part-time jobs in the community**, with the employers paying the wages/salary(ies). In this

instance, the students are employees of the community employers, **employers maintain liability, and the DRS does not reimburse the employers for the wages/salary(ies).**

## **A. Contractor's/School's Obligations**

The Contractor's/School's designated teacher/transition coordinator shall:

1. be knowledgeable about the contents and requirements of the Contract;
2. have received written authorizations from the DRS counselors prior to initiating work study services for eligible students or paying for work study services rendered by eligible students (i.e., not starting a student to work before the DRS has approved in writing);
3. serve as a member of the IEP team and make decisions for job placement as a team;
4. provide information regarding the program to School personnel, students, and parents;
5. provide job readiness instruction and assistance to the students in the program prior to starting their jobs (e.g., helping them prepare for interviewing for the potential position) through transition services or five core pre-employment transition services:
  - a. job exploration counseling;
  - b. work-based learning experiences;
  - c. counseling on opportunities for enrollment in postsecondary education (college, CareerTech, trade education, professional certification, etc.);
  - d. workplace readiness, including social and independent living skills; and
  - e. self-advocacy, including peer mentoring.
6. support students' job placement efforts, including tracking and regular follow up with students on their progress;
7. collaborate with the DRS counselor to keep track of all students who are taking part in the program, their place of employment, job title, and the skills they are learning or practicing, at least once per semester or whenever new students join or job duties change;
8. assist with the coordination of the individualized education program (IEP) and the individualized plan for employment (IPE) to reflect the SWS services provided by DRS, including, but not limited to, present levels of performance, services, and annual education/training or employment goals on the IEP;
9. document such transition services or pre-employment transition services provided and completed by participating students;
10. provide such documentation to the DRS counselor at the end of each semester;
11. submit (at the same time and by the 15<sup>th</sup> of the following month or whenever payroll is run by the School for their payment cycle) monthly invoices/pay stubs, time sheets, progress reports, and proof of payment to students for reimbursement of the wages paid to students participating in School Work Study and/or Worksite Learning; and
12. ensure the electronic copy of the contract is routed to the appropriate person for signature and returned electronically to the DRS.

If claiming mileage reimbursement for the School's teacher/transition coordinator's travel to and from the job sites of participating Work Study students, the School shall submit monthly itineraries and travel claims that have been signed and verified by the School's designated signer.

## **B. DRS's Obligations**

The DRS counselor shall:

1. provide authorization in the form of an Authorization for Purchase to the School's teacher/transition coordinator prior to the School initiating services for each eligible student participating in School Work Study and/or Worksite Learning;
2. provide a written/emailed approval to the School's teacher/transition coordinator prior to the initiation of a student's participation in Employer Work Study;
3. accept referrals, process applications, and help to organize the IEP and the IPE;
4. provide input on the IEP's employment goals, serve as a member of the IEP team, and make decisions for job placement as a team;
5. arrange work schedules to allow for meetings with School staff, the student in the program, parents, employers, and other people involved in the process;
6. organize and provide necessary services, such as, but not limited to vocational assessment & counseling and guidance;
7. provide the School's teacher/transition coordinator with updated information as it becomes available, upon request;
8. support students' job placement efforts, including tracking and regular follow up with students on their progress;
9. collaborate with the School's teacher/transition coordinator to keep track of all students who are taking part in the program, their place of employment, job title, and the skills they are learning or practicing, at least once per semester or whenever new students join, or job duties change;
10. monitor students' progress at job sites;
11. ensure that the School is submitting monthly timesheets, progress reports, proof of payments to students, and documentation of transition services or pre-employment transition services (as completed) on a regular basis;
12. provide reimbursement to the School for wages paid to students participating in School Work Study and/or Work Site Learning;
13. provide mileage reimbursement at the state rate for the School's teacher/transition coordinator's travel to and from job sites of students participating in School Work Study and/or Worksite Learning; and
14. provide support in assisting students graduating into Employer Work Study.

### C. Student Wage

1. The DRS and the School agree that students who are employed by the School as part of a training program are not independent contractors, but employees of the School. **The School agrees to deduct state and federal income tax from wages paid to the student.** The School is responsible for costs incurred for workers' compensation or other expenses not included in the minimum wage reimbursed by the DRS, as part of its contribution toward providing coordinated transition services outlined in the Individuals with Disabilities Education Act (IDEA) and the Workforce Innovation and Opportunity Act (WIOA).
2. The DRS and the School further agree that **IRS regulations provide that services performed by a student who is employed by the school in which the student is enrolled are not considered "employment" for purposes of FICA (Federal Insurance Contribution Act—Social Security and Medicare) and FUTA (Federal Unemployment Tax Act—employment tax)** payroll deductions. 26 C.F.R. § 31.3121(b)(10)-2(a)(1) and § 31.3306(c)(10)-2(a). The rules provide that the services

performed by the student must be incident to and for the purposes of pursuing a course of study at the School. 26 C.F.R. § 31.3121(b)(10)-2. **The DRS and the School agree that students who are employed by the School as part of a training program are not subject to FICA or FUTA, except as otherwise provided below.** The employee/student must be enrolled and regularly attending classes at the school where they are employed to have the status of a student within the meaning of the regulations. This exemption does not apply if the student is working for a private employer through Employer Work Study, rather than for the School as part of an internship program. *The student must be employed by the School in order for the exception to apply.* The Oklahoma Employment Security Act provides that employment as part of a work-training program is exempt from the definition of “employment” and, therefore, not subject to the Act and, therefore, should not be documented as wages paid in quarterly submissions to the Oklahoma Employment Security Commission (OESC). 40 O.S. §1-210 (15)(I). **At the end of the calendar year, students are to be provided a W-2 (Wage and Tax Statement), and not a 1099-Misc form for independent contractors.**

1. In order for the School to be reimbursed for wages paid to a student participating in School Work Study and/or Worksite Learning, the School must have received authorization in the form of an Authorization for Purchase from the DRS counselor prior to the student starting work.

## **I. Compensation**

### **A. Contract Amount**

The DRS shall reimburse the Contractor as follows:

- school months –the current federal minimum wage. EXEMPT from FICA and FUTA, thus should not be taken out of the student’s check.
- summer months –the current federal minimum wage, plus FICA and FUTA, as summer months are NOT exempt due to the student not being enrolled at least half-time in school.

Payment shall be made upon receipt of properly completed and approved invoices/pay stubs, time sheets and progress reports documenting the provision of services and/or receipt of proper claims for reimbursement of travel expenses pursuant to the contract for services. By law the **DRS cannot pay** in advance. Neither the Contractor nor any other parties may rely upon any amount set by the DRS in the Contract, or otherwise, as a guaranty, warranty, or any other promise of receipt or payment of that amount, except for those goods and/or services provided to and accepted by the DRS pursuant to the Contract.

The **DRS will cancel the Contract if procedures are not followed** (e.g., putting students to work before authorized, inappropriate job placements, delayed billing, not submitting proper documentation as outlined in the Contract). If a settlement/ratification agreement. must be reached between the Contractor and the DRS, the Contractor will receive only 50% of the funds for which it is seeking reimbursement.

The Oklahoma State Constitution, Article 10, Section 23 states, “Balanced Budget - Procedures. The state shall never create or authorize the creation of any debt or obligation, or fund or pay

any deficit, against the state, or any department, institution, or agency thereof, regardless of its form or the source of money from which it is to be paid, except as may be provided in this section and in Sections 24 and 25 of Article X of the Constitution of the State of Oklahoma.”

An express or written contract is a document evidencing, among other things, the mutual consent of the contracting parties. The written document becomes effective when the parties have signified their mutual consent by the act of signing it. The act of signing occurs when it occurs and applies only to events in the future.

To ensure you stay within the law and that you receive full compensation for services provided, please wait for official written documentation from your DRS counselors as to when a service may actually begin for an approved DRS client. The DRS CANNOT backdate in order to pay for services for any youth with disabilities.

According to 70 O.S. § 5-142, school districts must conduct national criminal record background searches and fingerprinting on prospective employees. Therefore, the DRS will reimburse the School up to fifty dollars (\$58.25) per DRS client who:

- \* is going to participate in School Work Study and/or Worksite Learning;
- \* is at least eighteen (18) years of age; and
- \* has not previously had a criminal background check completed by the school district or any other school district in Oklahoma.

This reimbursement will occur upon request and submission of properly completed documentation to the DRS counselor. If the Contractor chooses to request the expedited background check from the Oklahoma State Department of Education, the Contractor will be responsible for any additional fees beyond the fifty dollars (\$58.25).

## A. Payment

The State of Oklahoma has forty-five (45) days from receipt of properly completed and approved invoices/pay stubs, timesheets and progress reports documenting the provision of services and/or receipt of proper claims for reimbursement of travel expenses pursuant to the contract for services to make payment to the Contractor. Invoices/pay stubs, timesheets, progress reports, and claims shall be sent to the DRS counselor who authorized services for each DRS client. **DRS cannot reimburse wages for School Work Study and/or Worksite Learning hours that were not authorized in the form of an Authorization for Purchase provided by the DRS counselor prior to the student starting work.** The DRS counselor’s name, address, and telephone number are shown on each DRS client’s Authorization for Purchase. If the State of Oklahoma fails to make payment within the forty-five (45) days, the Contractor is eligible to receive interest on the unpaid balance due per State of Oklahoma Statutes. The Contractor is responsible for claiming the interest. Pursuant to 2 C.F.R. § 200.407(n), 2 C.F.R. § 200.441, the DRS shall not use federal funds or non-federal funds used for vocational rehabilitation (VR) match to pay interest assessed for late payments to the Contractor.

## B. Lapse Of Invoices/Claims

Properly completed and approved invoices/pay stubs, timesheets, and progress reports documenting the provision of services and/or proper claims for reimbursement of travel expenses pursuant to the contract for services shall be submitted within ninety (90) calendar days of the provision of those services and/or incurrence of those travel expenses. Supporting encumbrances may be cancelled upon a lapse of six (6) months from the actual provision of services and/or incurrence of travel expenses pursuant to the contract for services, unless specified otherwise in the Contract.

## **I. Standard Terms**

### **A. Non-Discrimination**

The Contractor shall at all times comply with all applicable federal laws relating to nondiscrimination, including but not limited to the Civil Rights Act of 1964 (42 U.S.C. §2000 *et seq.*), Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. §794), the Americans With Disabilities Act of 1990 (42 U.S.C. §12101 *et seq.*), Title IX of the Education Amendments of 1972 (20 U.S.C. §1681 *et seq.*), the Age Discrimination in Employment Act (42 U.S.C. §6101 *et seq.*), and all amendments to these acts, and all requirements imposed by the regulations issued pursuant to these acts. Contractor acknowledges and agrees that it will take no action, make no decision, and grant no preference or disadvantage, directly or indirectly, based on a person's race, color, national origin, ethnicity, religion, sex, or marital status.

### **B. Lobbying Activities**

The Contractor certifies the following:

1. No federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer of Congress in connection with the making of any federal grant, the entering into of any cooperative agreement, and the extension, renewal, amendment or modification of any federal grant, or cooperative agreement;
2. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of Congress, an officer or employee of Congress, or an employee of a member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

### **C. Debarment And Suspension**

In accordance with Presidential Executive Orders 12549 and 12689, the Contractor certifies that neither it nor its principals are presently debarred, suspended or otherwise disqualified for participation in federal assistance programs. Such certification is a material representation of fact upon which reliance is being placed when entering into the Contract. A determination that the Contractor knowingly rendered an erroneous certification, in addition to other available remedies, may result in whole or partial termination of the Contractor's default.

Additionally, the Contractor shall promptly provide written notice to the Oklahoma state purchasing director if the certification becomes erroneous due to changed circumstances.

#### **A. Drug-Free Workplace**

The Contractor certifies compliance in providing or continuing to provide a drug-free workplace in accordance with the Drug-Free Workplace Act of 1988.

#### **B. Modification**

The Contract may only be modified by mutual consent of the parties in writing.

#### **C. Cancellation**

1. **With Cause:** In the event the Contractor fails to meet the terms and conditions of the Contract or fails to provide services in accordance with the provisions of the Contract, the DRS may upon written notice of default transmitted via Certified Mail to Contractor, cancel the Contract effective upon receipt of notice or at 5:00 PM on the fifth calendar day from the date DRS mailed the notice, whichever occurs first. Such cancellation shall not be an exclusive remedy but shall be in addition to any other rights and remedies provided for by law. In the event a Notice of Cancellation is issued, the Contractor shall have the right to request a review of such decision as provided by the rules and regulations promulgated by the State of Oklahoma, Office of Management and Enterprise Services.
2. **Without Cause:** It is further agreed that the Contract may be canceled by either party by providing thirty (30) days prior written notice.

#### **D. Access To And Retention Of Records**

The Contractor shall maintain adequate and separate accounting and fiscal records and account for all funds provided by any source to pay the cost of the Contract. Authorized personnel of the U.S. Department of Education or other pertinent federal agencies, and authorized personnel of the Oklahoma Department of Rehabilitation Services, State Auditor and Inspector, and other appropriate state entities shall have the right of access to any books, documents, papers, or other records of contract which are pertinent to the performance or payment of the Contract in order to audit, examine, make excerpts and/or transcripts.

The Contractor is required to retain records relative to the Contract for the duration of the Contract and for a period of seven (7) years following completion or termination of the Contract, unless otherwise indicated in the Contract terms. If a claim, audit, litigation or other action involving such records is started before the end of the seven-year period, the records are required to be maintained for two (2) years from the date that all issues arising out of the action are resolved or until the end of the seven-year retention period, whichever is later.

#### **E. Subcontracting**

The services to be performed under the Contract shall not be subcontracted, in whole or in part, to any other person or entity without written approval by the DRS. The terms of the Contract, and such additional terms as the DRS may require, shall be included in any subcontract. Approval of the subcontract shall not relieve the Contractor of any responsibility for performing the Contract.

#### **A. Compliance With State And Federal Laws**

The Contractor shall comply with all applicable state and federal laws, rules and regulations relevant to the performance of the Contract. Compliance shall be the responsibility of the Contractor, without reliance on or direction by the DRS.

#### **B. Travel**

The travel expenses to be incurred by the Contractor pursuant to the Contract shall be included in the total amount of the contract award. The DRS will only pay travel expenses (including per diem) specified in and charged against the total amount of the contract award. In addition, the DRS will not reimburse travel expenses in excess of the rate established by the Oklahoma State Travel Reimbursement Act, 74 O.S. § 500.1-37. The Contractor shall be responsible for all travel arrangements and provide supporting documentation for reimbursement.

#### **C. Client Confidentiality**

The Contractor assures compliance with DRS requirements pertaining to the protection, use, and release of personal information. The Contractor will hold confidential all personal information regarding individuals, including lists of names, addresses, photographs, records of evaluation, and all other records of the DRS client. This information may not be disclosed, directly or indirectly, unless consent is obtained in writing or as otherwise required by law.

#### **D. Unallowable Costs**

In the event any audit, audit resolution, review, monitoring, or other oversight results in the determination that the Contractor has expended DRS funds on unallowable costs on this or any previous contract, the Contractor shall reimburse the DRS in full for all such costs on demand. The DRS may, at its sole discretion, deduct and withhold such amounts from subsequent payments to be made to the Contractor under this or other contracts.

#### **E. Audit**

##### **1. Federal Funds**

Organizations that expend \$1,000,000 or more in a year in federal funds from all sources shall have a certified independent audit conducted in accordance with 2 C.F.R. Part 200.

##### **2. State Funds**

Corporations both for-profit and non-profit, and governmental entities that receive \$50,000 or more in a year in State funds from DRS shall have a certified independent audit of its operations conducted in accordance with Government Auditing Standards. The financial statements shall be prepared in accordance with Generally Accepted Accounting Principles, and the report shall include a supplementary schedule of awards listing all state and federal funds by funding source.

**1. Auditor Approval and Audit Distribution**

The audit shall be performed by a certified public accountant or public accountant who has a valid and current permit to practice public accountancy in the State of Oklahoma, and who is approved by the Oklahoma Accountancy Board to perform audits according to Government Auditing Standards. The Contractor's fiscal managers and appropriate oversight bodies shall review the auditor's latest external quality control review report prior to the audit being conducted. DRS retains the right to examine the work papers of said auditor.

The Contractor shall submit two copies of the annual audit report, management letter (if applicable), corrective action plan to all audit findings, and the auditor's latest external quality control review report to the DRS Contracts Unit at 3535 N.W. 58<sup>th</sup> Street, Suite 300, Oklahoma City, OK 73112 or [Contracts@okdrs.gov](mailto:Contracts@okdrs.gov) within 120 days of the Contractor's fiscal year end. In the event the Contractor is unable to provide the audit report within the time specified, the Contractor shall submit a written request for an extension to the physical address or email address listed above, citing the reason for delay. The DRS reserves the right to suspend payment to the Contractor for costs owed pursuant to this Contract if the DRS has not received the prior year audit.

**F. Clean Air Act**

The Contractor agrees to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act, as amended, 42 U.S.C. § 7401 *et seq.* The Contractor agrees to report each violation to DRS and understands and agrees that DRS will, in turn, report each violation as required to assure notification to the appropriate Environmental Protection Agency Regional Office.

**G. Employment Relationship**

The Contract does not create an employment relationship. Individuals performing services required by the Contract are not considered employees of the State of Oklahoma or the DRS for any purpose, and as such shall not be eligible for benefits accruing to state employees. The Contractor shall comply with all applicable laws regarding workers' compensation insurance.

**H. Insurance**

If the Contractor is not a self-insured governmental entity, the Contractor is hereby required to carry liability insurance adequate to compensate persons for injury to their person or property occasioned by an act of negligence by the Contractor, its agents or employees. Said

policy must provide that the carrier may not cancel or transfer the policy without giving the DRS thirty (30) days written notice prior to the cancellation or transfer. The Contractor shall timely renew the policies to be carried pursuant to this section throughout the term of the Contract and provide the DRS with evidence of such insurance and renewals upon request.

#### **A. Punitive Actions**

The Contractor understands that payment for services to DRS clients pursuant to the Contract shall be made by the DRS. Accordingly, the Contractor shall not restrict or refuse services under the Contract to DRS clients based on nonpayment by the DRS. No actions shall be taken against the DRS client, including collection actions for any service covered under the Contract, or for any late payment for which the DRS has responsibility. In addition, the Contractor agrees that no punitive actions will be taken against any client of the DRS for late payment of any tuition, fees, books, supplies, etc. for which the DRS has responsibility. This includes, but is not limited to, withholding grades, Pell or other financial aids, or delaying enrollment.

#### **B. Prior DRS/State Employment**

The Contractor hereby certifies that at the start of the contract period neither he/she nor, if applicable, any member of its board or officers are former DRS employees who were employed by the DRS during the prior twelve (12) months. Pursuant to 74 O.S. § 85.42(B), the Contractor also certifies that no person who has been involved in any manner in the development of this contract while employed by the State of Oklahoma shall be employed by the Contractor to fulfill any of the services provided for under said contract. This term shall not apply when the Contractor is a State of Oklahoma governmental entity.

#### **C. Legal Employment Status Verification System**

The Contractor certifies that it and all proposed subcontractors, whether known or unknown at the time the Contract is executed or awarded, are in compliance with the Oklahoma Taxpayer and Citizen Protection Act of 2007 (25 O.S. §§ 1312 and 1313) and all applicable federal immigration laws and are registered and participate in the Status Verification System. The Status Verification System is defined at 25 O.S. §1312 and includes but is not limited to the free Employment Verification Program (E-Verify) through the Department of Homeland Security and is available at [www.dhs.gov/E-Verify](http://www.dhs.gov/E-Verify).

#### **D. Contract Jurisdiction**

The Contract will be governed in all respects by the laws of the State of Oklahoma. The State of Oklahoma, District Court of Oklahoma County will be the venue in the event any legal action is filed by the DRS or the Contractor to enforce or to interpret provisions of the Contract.

#### **E. Severability**

If any provision under the Contract, or its application to any person or circumstance, is held invalid by any court of competent jurisdiction, such invalidity does not affect any other

provision of the Contract or its application that can be given effect without the invalid provision or application.

#### **A. TikTok Ban**

Pursuant to State of Oklahoma Governor's Executive Order 2022-33, no person or entity who contracts with the State of Oklahoma, including but not limited to any State agency, board, commission, or authority and agents thereof, shall download or use the TikTok application or visit the TikTok website on government networks or other State-owned or State-leased equipment.

#### **B. Certification For Non-Boycott Of Israel Goods Or Services**

Pursuant to 74 O.S. § 582, in contracts of more than \$100,000, the Contractor certifies that it is not currently engaged in a boycott of goods or services from Israel that constitutes an integral part of business conducted or sought to be conducted with the State of Oklahoma, and that it will not boycott Israel during the term of the Contract.

#### **C. Certification For Non-Boycott Of Fossil Fuel Energy Companies**

In contracts of \$100,000 or more and where the Contractor has 10 or more employees, the Contractor certifies that it does not currently boycott energy companies in violation of the Energy Discrimination Elimination Act of 2022 (74 O.S. § 12001 et seq.). The Contractor further certifies that it will not boycott energy companies in violation of the Act during the term of the Contract.

#### **D. Force Majeure**

A party is not liable for failure to perform the party's obligations if such failure is a result of Acts of God (including fire, flood, earthquake, storm, or other natural disaster), war, invasion, act of foreign enemies, hostilities (regardless of whether war is declared), strikes or labor disputes, embargoes, government orders, epidemics, pandemics or other similar events beyond the reasonable control of the party. If a party asserts Force Majeure as an excuse for failure to perform the party's obligation, then the nonperforming party must prove that the party took reasonable steps to minimize delay or damages caused by foreseeable events, that the party substantially fulfilled all non-excused obligations, and that the other party was timely notified of the likelihood or actual occurrence of an event described in this clause.

If an event of Force Majeure occurs, the party injured by the other's inability to perform may elect one of the following remedies:

- to terminate the Contract in whole or in part; or
- to suspend the Contract, in whole or part, for the duration of the Force Majeure circumstances.

The party experiencing the Force Majeure circumstances shall cooperate with and assist

the injured party in all reasonable ways to minimize the impact of Force Majeure on the injured party.

**A. Termination For Funding Insufficiency**

Notwithstanding anything to the contrary in any Contract document, the DRS may terminate the Contract in whole or in part if funds sufficient to pay obligations under the Contract are not appropriated by the legislature or are not received from an intended third-party funding source. In the event of such insufficiency, the Contractor shall be provided at least fifteen (15) calendar days' written notice of termination. Any partial termination of the Contract under this section shall not be construed as a waiver of, and shall not affect, the rights and obligations of any party regarding portions of the Contract that are not terminated. The determination by the DRS of insufficient funding shall be accepted by and shall be final and binding on the Contractor.

**B. Prohibition On Certain Telecommunications And Video Surveillance**

The Contractor shall not obligate or expend funds received as payment under this contract to procure or obtain equipment, services, or systems that use telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system produced by one of the prohibited companies as provided for at 2 C.F.R. § 200.216.

**C. Offender List Registration Declaration and Compliance with 57 O.S. § 589 and 70 O.S. § 6-101.48.**

This section applies to contractors who provide services to persons under eighteen (18) years of age or who provide services on the premises of the Oklahoma School for the Blind (OSB) or the Oklahoma School for the Deaf (OSD).

**Offender List Registration Declaration**

The Contractor's signing authority for the Contract hereby states under penalty of perjury under the laws of Oklahoma that the foregoing is true and correct:

1. I am the Contractor OR I am the duly authorized representative of the Contractor;  
and
  
2. Neither the Contractor nor any employee of the Contractor, nor any subcontractor or employee of a subcontractor, who provides services to persons under the age of eighteen (18) years pursuant to the terms of this contract, or who works on the premises of OSB or OSD is currently required to register under the provisions of the Oklahoma Sex Offenders Registration Act (57 O.S. §§ 581 *et seq.*) or the Mary Rippy Violent Crime Offenders Registration Act (57 O.S. §§ 591 *et seq.*)

Compliance with 57 O.S. § 589 and 70 O.S. § 6-101.48

As applicable, Contractor shall comply with all requirements provided for at 57 O.S. § 589 and 70 O.S. § 6-101.48.

**I. Signatures**

For the faithful performance of the terms of the Contract, the parties hereto, in their official capacities stated, affix their signatures.

Oklahoma Department of  
Rehabilitation Services

Susan Smith 04/14/2026

Signature Date

**Susan Smith**

Print Name

**APO IV**

Title

Contractor

\_\_\_\_\_  
Signature Date

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Contact Person Telephone

\_\_\_\_\_  
Contractor's Email Address

CONTRACT FOR LANGUAGE INTERPRETING AND TRANSLATING

AGREEMENT ENTERED INTO ON May 11, 2026, BETWEEN SEBASTIAN LANTOS LLC (HEREIN SL LLC) AND COMPANY/ORGANIZATION

NAME: OWASSO PUBLIC SCHOOLS BILLING CONTACT: CAPRICE HURST

PHONE: 918-272-8021 EMAIL: caprice.hurst@owassops.org

ADDRESS: 1501 N ASH CITY: OWASSO STATE: OK ZIP: 74055

PLEASE SIGN AND EMAIL to [dispatch@lantosconsulting.com](mailto:dispatch@lantosconsulting.com).

SL LLC. agrees to provide as available language interpreting/translating services on an "as requested" basis with the above-named organization. This service agreement will be in effect until rates or policies change. Upon such time, you will be notified, and a new service agreement will be sent to you.

RATES

REMOTE Interpreting Regular Rate: Spanish <> English: \$ 80 hr – 1 hr min

IN-PERSON Interpreting: Spanish <> English: \$80 hr - 1 hr min + mileage

Interpreting Rate: Other Languages <> English : Quoted at time of request .

Translation Rates: 0.18 Spanish<> English per word, \$180 min. Other language pairs TBD.

INTERPRETING SERVICES POLICIES AND PROCEDURES

QUALITY OF SERVICE: For each request, we will contact and assign the highest certified/skilled interpreters available. Only those interpreters which normally are considered "qualified" and with experience will be used. SL LLC may assign a non certified/skilled/experienced interpreter for an unusual language where a bilingual interpreter has limited/no experience. Interpreters are required by Sebastian Lantos LLC to only accept assignments for which they feel they are qualified. The Interpreters Code of Ethics, HIPAA and other confidentiality agreements apply to all our subcontractors. PLEASE CONTACT US WITH ANY ISSUES REGARDING THE LANGUAGE INTERPRETERS. WE WELCOME YOUR FEEDBACK AND STRIVE TO IMPROVE. BOOKING:

- 1) BY CALLING 918-250-1133 or 918-250-5000
- 2) EMAILING YOUR REQUEST TO [DISPATCH@LANTOSCONSULTING.COM](mailto:DISPATCH@LANTOSCONSULTING.COM)
- 3) GO ONLINE WITH OUR SCHEDULING SYSTEM. PLEASE CONTACT SHARLA PINN FOR MORE INFORMATION

The HOURLY RATE will cover the first 1-60 minutes of all assignments.

QUANTITY: Most simultaneous interpreting assignments going over 40 minutes will require 2 interpreters working together as a team. Charges are incurred for the block of time booked, for example: if services are booked from 8am- 5pm, billing will be for nine hours for each interpreter needed. Prep. time will be charged for theatrical or other assignments needing extensive time for preparation. MILEAGE: Interpreters actual mileage will be paid on all assignments according to the Oklahoma State Travel Reimbursement Act (current IRS rate at time of service) along with any other actual expenses (parking, tolls, etc.) Mileage will vary depending on interpreters location or from our office.

BLOCK OF TIME: Interpreting services are booked by the amount of time you reserve. Please be careful when booking an assignment. You will be charged the amount of time you've booked services regardless, if the assignment finishes early, if the end-consumer doesn't show up, or the event is canceled.

CANCELLATION POLICY: To avoid a one-hour charge, ALL assignments must be canceled no less than 24 business hours (during Sebastian Lantos LLC office hours) from the start time of the assignment. The cancellation policy goes into effect the moment an order is taken, and canceling services must be done through our office only, NOT through the interpreter(s) assigned. PAYMENT: 30 days from invoice.

I, \_\_\_\_\_ being a person of authority representing the School District have read and understand the above defined "Rates, Policies & Procedures" and will abide by these procedures as outlined. If your School District cannot enter this type of contract, or needs to use PO's or a Letter of Agreement as a contract, please let us know. Contact our Office Manager, Sharla Pinn, for more details.

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<i>Sebastian Lantos</i>	Owner	4/16/2026
Signature	Title	Date

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Signature	Title	Date
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P.O.BOX 33020 TULSA, OK 74153

DISPATCH@LANTOSCONSULTING.COM— 918-250-1133

# **Memorandum of Understanding (MOU)**

Between

**GRAND Mental Health (GRAND) and**

**Owasso Public Schools**

THIS MEMORANDUM OF UNDERSTANDING (Agreement) is entered into on this 16th day of April 2026 (Effective Date), by and between GRAND Mental Health (GRAND) and Owasso Public Schools.

NOW, THEREFORE, in consideration of the mutual terms, obligations, and agreements contained herein, GRAND and Owasso Public Schools agree as follows:

## **Relations of the Parties**

In the performance of their respective duties and obligations hereunder, the parties and their respective employees and agents shall at all times act as independent contractors and neither party, nor their respective employees and agents, shall be considered a partner, agent, servant, employee of, or joint venturer with the other party. Unless otherwise agreed to herein, the parties acknowledge and agree that neither will be liable for the activities of the other, nor the agents and employees of the other, including but not limited to, any liabilities, losses, damages, suits, actions, fines, penalties, claims, or demands of any kind or nature by or on behalf of any person. This provision shall survive termination or expiration of this Agreement.

## **PURPOSE**

The purpose of this MOU is to establish a working relationship, outlining a plan for GRAND to provide mental health and/or substance use services at Owasso Public Schools for students needing these services. The goals of this MOU include, but are not limited to, providing early intervention for students in need of mental health and/or substance use services to: (1) Prevent and/or decrease the number of students with suicidal behaviors or attempts; (2) Assist school personnel in identifying students at risk for emotional or behavioral challenges; (3) Provide targeted interventions for students and their families to achieve positive outcomes; (4) Promote a positive school environment; and (5) Decrease student dropouts and increase graduation rates.

## **Outpatient Services**

### **Obligations of GRAND:**

1. If a school official or a GRAND team member believes a student is in need of a referral for GRAND services, the individuals from both parties will meet (either during a Multidisciplinary Team Meeting (MDT) or at a separate meeting) and shall staff the case.
2. If it is decided that a referral is needed, school officials shall discuss the referral with the student's guardian.

3. If the student's guardian agrees with a referral to GRAND Mental Health for services, either school official or a GRAND team member will make the referral to GRAND Mental Health using the online referral system through the GRAND website.
4. Once a referral for outpatient mental health or substance use services is made to GRAND Mental Health, an attempt will be made to contact the legal guardian within 24 hours to schedule an outpatient screening appointment within 48 hours.
  - a. NOTE: The family will always be told they can walk into any GRAND office Monday – Friday 8:00 a.m. – 5:00 p.m. and receive a screening if they choose, rather than scheduling a screening.
5. After the screening is scheduled, the referral source will be notified that the screening has been scheduled.
  - a. If the screening cannot be scheduled within 10 business days, the referral source will be notified.
6. Once the screening is completed, the student / family will be assigned to a GRAND Clinical team that will begin working with the student / family, and they will receive the full array of Certified Community Behavioral Health Center (CCBHC) services provided by GRAND.
7. Individuals on the GRAND team may include a Therapist (a Licensed or Under Supervision for Licensure Mental Health Professional), a Skills Development Professional (Bachelor's Level Clinician), a Behavioral Health Coach (Individual with minimum of 60 college credit hours), and/or a Family Support Provider (a paraprofessional with training and lived experience raising a child that experienced emotional difficulties).
8. Individuals from the GRAND team will provide services for students within the school (only those students that are clients of GRAND). NOTE: GRAND team members will attempt to provide services for students during non-core, elective classes.
9. At the request of school personnel, GRAND team members may participate in parent conferences or other meetings as mutually agreed upon by both parties.
10. GRAND team members shall participate in Multidisciplinary Team Meetings (MDT) with school personnel.
11. At the request of school officials, GRAND team members shall provide training and consultations as agreed upon by GRAND administration.
12. GRAND team members will provide support for district-wide crisis situations.
13. GRAND should provide in-service training for District staff as mutually agreed upon by both parties.

14. GRAND will ensure insurance coverage of \$1,000,000.00 per occurrence and \$3,000,000.00 aggregate for abuse / molestation; \$1,000,000.00 per occurrence and \$3,000,000.00 aggregate for professional liability; and an umbrella over professional liability of \$10,000,000.00.
15. GRAND agrees to protect the privacy of student information and educational records in accordance with the Family Educational Rights and Privacy Act of 1974, as amended (FERPA) and Oklahoma Law.

### **Obligations of School:**

1. Provide referrals to GRAND Mental Health for students needing mental health and/or substance use counseling services.
2. Allow school personnel to attend Multidisciplinary Team Meetings (MDT).
3. Provide confidential locations for GRAND team members to meet with students to provide services.
4. Allow GRAND team members to access the school internet only for the purposes of doing collaborative documentation.
5. Provide GRAND team members working in each school with necessary safety drill information and expectations regarding their role in each of these drills.

### **Crisis Services**

Any student experiencing crisis behaviors while at school will have access to crisis screening and assessment services provided by GRAND Mental Health.

### **Obligations of GRAND:**

1. GRAND shall provide crisis screening through in-person assessment or via medical device (*aka iPad*) provided by GRAND, utilizing HIPAA-compliant software known as ApexCare.
2. Crisis screenings shall be provided by a Licensed or Under Supervision for Licensure Mental Health Professional.
3. The goal of the crisis screening shall be to de-escalate the crisis to prevent the student from entering a higher level of care or from being removed from the school and/or home environment.
4. If the student does require a higher level of care, the clinician will work with school administration and the student's legal guardian to coordinate this higher level of care.
5. If the student is able to de-escalate and does not require a higher level of care, the GRAND clinician will develop a thorough, 24-hour safety plan, with action steps for school personnel, legal guardians, student, and any other supports involved in the student's life and ensure this

plan is fully communicated to all parties to maintain the safety of the student and others involved.

6. If the GRAND team member or school personnel believe the student may benefit from additional outpatient mental health or substance use services, a referral for outpatient services will be made after consent is obtained from the student's legal guardian.

### **Obligations of School:**

1. School personnel shall contact GRAND Mental Health any time a student is experiencing a mental health or substance-related crisis.
2. School personnel shall ensure a confidential location where students can receive crisis screening either via face-to-face with a GRAND clinician or via medical device (*aka iPad*).
3. If crisis screening is to be provided via medical device (*that has been previously provided by GRAND and a GRAND staff member is not on-site to assist with setting up the medical device*), school personnel will assist with setting up the medical device and assisting the student with connecting to a GRAND clinician for crisis screening assessment.
4. When a student does receive a crisis screening service provided by GRAND, school personnel will be responsible for notifying the student's legal guardian that the crisis screening was provided and the rationale for why the screening was necessary.
  - a. If the GRAND clinician determines that a student does need a higher level of care due to being a danger to self or others, school personnel will be responsible for contacting the student's legal guardian and informing the legal guardian of this information and requesting their presence at the school.
    - i. The GRAND clinician, school personnel, and legal guardian will all work together to find an appropriate higher level treatment provider.
  - b. If the GRAND clinician determines that a higher level of care is not needed and the student is able to remain safely at school and at home, the GRAND clinician will develop a thorough, 24-hour safety plan, with action steps for school personnel, legal guardians, student, and any other supports involved in the student's life and ensure this plan is fully communicated to all parties to maintain the safety of the student and others involved.
5. If it is determined that a referral for outpatient services is appropriate, the GRAND clinician will discuss with school personnel and the legal guardian (as well as the student), and if the legal guardian is in agreement, a referral for outpatient services will be made (NOTE: See above related to "Outpatient Services").

**Additional and On-Going Obligations of Parties:**

1. GRAND will provide de-identified student information from the University of Oklahoma’s Evaluation Team - Youth Information System (YIS) to school administration annually related to crisis services provided for students at the school during the previous year.
  - a. This information will be evaluated to determine the effectiveness of services provided and for continuous quality improvement.
2. Every two years, GRAND and school administration will review this MOU and the school crisis protocol to consider any updates necessary to better meet the needs of the students. In addition, the Oklahoma Prevention Needs Assessment will be included in the meeting review to assist in determining if any additional changes are needed.
3. School administration shall submit the latest protocol and MOU to the Oklahoma Department of Education.

**Term and Termination:**

The initial term of this Agreement shall commence on the effective date and shall continue through June of 2027. Thereafter, all changes to the protocol and MOU will need to be signed by the school board and GRAND officials and submitted to the Oklahoma Department of Education by school administration.

**IN WITNESS WHEREOF, the parties have executed this Agreement as of the date first set forth above. Each individual signing below represents and warrants that he/she is a duly authorized individual with authority to bind his/her respective party.**

**School Administration**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name Printed

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

**GRAND Mental Health**

*Lindsey Johnson*  
\_\_\_\_\_  
Signature

Lindsey Johnson  
\_\_\_\_\_  
Name Printed

Executive Director  
\_\_\_\_\_  
Title

4/16/2026  
\_\_\_\_\_  
Date

# MOBILITY SERVICES AGREEMENT

School Year 2026-2027

This Orientation and Mobility Services Agreement (the “Agreement”) dated as of the 1<sup>st</sup> day of July, 2026, is between Mobilized Vision, LLC, an independent contractor (in which Christina Evans, COMS/CTVI is sole member and owner), hereinafter referred to as Mobilized Vision, and Owasso Public Schools.

In consideration of the mutual terms, covenants and conditions specified in this Agreement, Owasso Schools and Mobilized Vision agree as follows:

1. **Orientation and Mobility Services.** Mobilized Vision agrees to provide orientation and mobility services to designated students of Owasso Schools as requested during the term of this Agreement.
2. **Orientation and Mobility Specialist Services.** Mobilized Vision shall provide such orientation and mobility services as indicated by the Owasso Schools’ student’s Individualized Education Program or 504 Accommodation Plan as established by Mobilized Vision (the “O&M Services”). The O&M Services shall include, without limitation, orientation and mobility evaluations and treatment as deemed appropriate by the Orientation and Mobility Specialist and the Owasso Schools Special Education Director, recording students’ progress and preparing materials and assembling equipment used during treatment if necessary, participation in student-focused meetings and program-focused meetings, and completing paperwork. All equipment and materials to be used in treatment together with documentation forms will be provided by Owasso Schools. The specific starting date for Mobilized Vision’s delivery of Services will be mutually determined by the Owasso Schools and her. Mobilized Vision will deliver Orientation and Mobility Services to Owasso students for approximately five (5) hours per school week during the term of the Agreement.
3. **Certification.** Mobilized Vision represents and warrants that she is certified by the Academy for Certification of Vision Rehabilitation and Education Professionals (ACVREP) to provide Orientation and Mobility Services to Owasso Schools’ students. Mobilized Vision shall notify Owasso Schools immediately if, for any reason, her required certification is not renewed upon expiration.
4. **Confidentiality.** Mobilized Vision agrees to adhere to all state and federal laws regarding the confidentiality and privacy of the education records and patient healthcare records of students and students with disabilities.
5. **Insurance.** Mobilized Vision represents and warrants that she is insured under a professional liability policy in a minimum amount of \$1,000,000.00 per incident/occurrence and \$3,000,000.00 aggregate, and that such insurance covers her when she is providing Orientation and Mobility Services as a certified orientation and

mobility specialist on the premises of Owasso Schools with proof of insurance upon request.

- 6. Indemnification.** In addition to the requirement of paragraph 5 and not in lieu thereof, Mobilized Vision agrees to indemnify and hold Owasso Schools and its agents, employees and officers harmless (including defense costs) against any claim, demand or action against Owasso Schools arising from services provided by Mobilized Vision.
- 7. Worker's Compensation.** Mobilized Vision certifies that, by law, she is not required to obtain Worker's Compensation Insurance and shall in no event be entitled to such coverage from Owasso Schools.
- 8. Background Checks.** Mobilized Vision further represents and warrants that she has not been convicted of a felony, a sex offense subject to the Sex Offenders Registration Act in Oklahoma or the sex offender registration provisions of another state or federal law. Mobilized Vision agrees to provide Owasso Schools with written consent for Owasso Schools to conduct such background checks and criminal history investigations as Owasso Schools may request from time to time during the term of this Agreement.
- 9. Compensation.** Owasso Schools agrees to pay Mobilized Vision the sum of \$86.00 per hour port to port for Orientation and Mobility Services. Mobilized Vision agrees to invoice Owasso Schools monthly for all Services provided. Mobilized Vision agrees and acknowledges that all required documentation must be submitted to Owasso Schools **no later than the 5<sup>th</sup> day of the month following the month in which the Services were provided**, and that Owasso Schools has no obligation to forward payment to Mobilized Vision until Owasso Schools has been provided the required documentation.
- 10. Term and Termination.** This Agreement is effective as of July 1, 2026 and shall continue in effect through June 30, 2027, unless terminated earlier as provided herein. Either party may terminate this Agreement upon 60 (60) days' written notice.
- 11. Independent Contractor Status.** Each party is acting as an independent contractor and no employee or subcontractor of either party shall be deemed to be an employee of the other. Neither party undertakes by this Agreement or otherwise, to perform any obligation of the other party, whether regulatory or contractual, or to assume any responsibility for the other party's actions, business or operations. Neither party shall have the authority to bind, commit or incur any liability on behalf of the other party or to otherwise act in any way as an agent or representative of the other party.
- 12. Force Majeure.** Neither party shall be responsible for any failure or delay in the performance of any obligations due to any cause beyond its reasonable control, including, but not limited to, any such delay or failure arising from third party labor disputes, third party strikes, other third party labor or industrial disturbances, acts of God, floods, lightning, earthquakes, shortages of materials, rationing, utility or

communication failures, fire, casualty, war, acts of public enemy, riots, insurrections, embargoes, blockages, actions, restrictions, and new or changed regulations or orders of any governmental authority; provided that the party claiming force majeure event has given the other party reasonably prompt notice of the event.

**13. Notices.** All notices given hereunder shall be in writing and shall be given or sent by (i) certified, first class, U.S. mail to the parties at the addresses herein or at such other addresses of which either party may give notice; (ii) confirmed facsimile; or (iii) nationally recognized courier service to the parties at the addresses herein or at such other addresses of which either party may give notice.

**14. Miscellaneous.** This agreement embodies the entire agreement and understanding between Owasso Schools and Mobilized Vision relating to the subject matter of this Agreement, and supersedes all previous communications, representations, understandings, and agreements, whether oral or written. This Agreement is to be governed by and construed in accordance with the laws, excluding the conflicts laws, of the State of Oklahoma. This Agreement may be amended only in a writing signed by both parties. If any provision of this Agreement is held by a court of competent jurisdiction to be invalid or unenforceable, then that provision will be severed from this Agreement and any remaining provisions will continue in full force and effect. This Agreement shall be binding upon and inure to the benefit of and be enforceable by the parties to this Agreement and their respective successors and permitted assigns. This Agreement may not be assigned by either party without the prior written consent of the other party. No waiver by either party hereto of any breach of any provision herein shall constitute waiver of any other provision nor shall such waiver constitute consent that the breach may continue or that any other breach will be waived. In the event of any suits or actions or other proceedings to enforce the terms of this Agreement, the prevailing party shall be entitled to recover its reasonable attorney fees and other costs and expenses incurred therein. The confidentiality provisions of this Agreement shall survive the termination of this Agreement.

OWASSO PUBLIC SCHOOLS  
OWASSO, OKLAHOMA

By: \_\_\_\_\_  
President, Board of Education



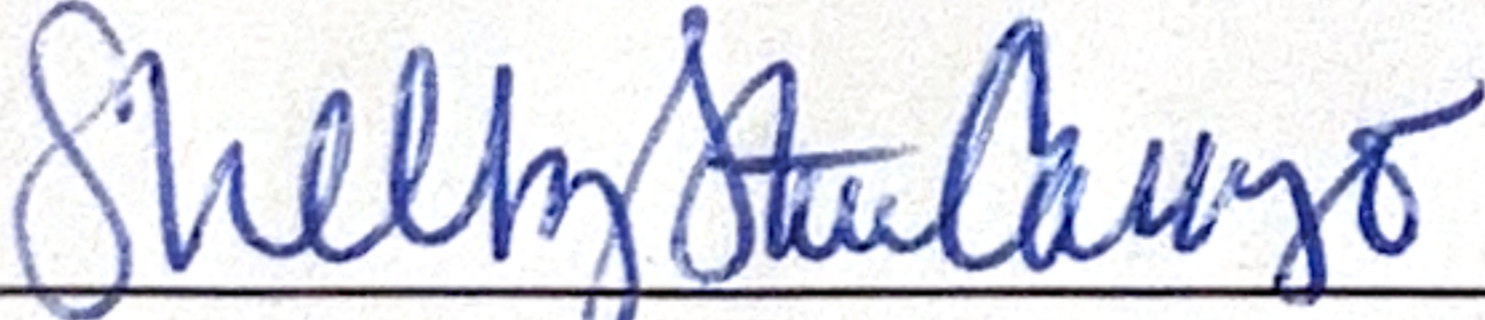
\_\_\_\_\_  
MOBILIZED VISION, CHRISTINA EVANS, COMS

## CONTRACTUAL AGREEMENT FOR SPEECH LANGUAGE PATHOLOGY SERVICES

This agreement is between Owasso Public School ( hereinafter referred to as a school) and Shelby Stavely Caruso (hereinafter referred to as therapists) wherein good and valuable consideration it is hereby agreed that the therapist is certified by the Oklahoma Department of Education as Speech Language Pathologist and being certified by the American Speech and Language Association (ASHA) and being licensed by the Oklahoma Board of Examiners for Speech Language Pathology and Audiology (OBESPA) agrees to provide Speech and Language therapy services according to the following stipulated provisions.

1. Therapist agrees during the term of this agreement to be covered by adequate professional liability and malpractice insurance.
2. Therapist is stipulated to be an independent contractor and is not an agent of the school. Further, the school shall not be responsible for any losses or liabilities sustained as a result of therapist malfeasance or negligence.
3. The school shall take all necessary steps to assure provision of and complete access by the therapist to all records, supplies and equipment within the school necessary for the performance of services described herein.
4. Therapist agrees not to bill Medicaid individually for Speech Language Therapy services.
5. Therapist agrees to retain as confidential all information relating to the policies, procedures, and resources of the school provided. However, the therapist reserves the express right to act as consultant to any other school or related institution during the term of this agreement or subsequent thereto.
6. In the event the Therapist delivers a child and takes maternity leave, this contract shall not be voided and will resume upon Therapist's return. Therapist is responsible for proactively supplying minutes required on the IEP and scheduling IEP meetings prior to absence.
7. Therapist shall devote a sufficient number of hours based upon the needs of the school to carry out the above responsibilities.
8. In consideration of the services to be performed, the school agrees to pay the therapist the fees listed below. Billing will be made monthly to the school. Payment is to be made within thirty (30) days of receipt of invoice for services rendered.
9. \$60.00 per hour to include diagnostics, formal evaluations, screening, direct treatment, consultation, IEP meetings (when applicable), and/or monitoring. For every 3 hours of services rendered, 1 hour of documentation time (this time includes IEP paperwork, progress notes, therapy planning, scoring of formal evaluations, language samples, etc.) will be billed via the time log required by the school. Both will be completed and submitted within the first three days of the month.

This contract will be in effect for the full Extended School Year term of June 1, 2026- July 31, 2026. This agreement shall not be assignable by either party, however, this agreement may be modified or terminated by either party provided that the other party gives thirty (30) days written notice.

  
\_\_\_\_\_  
Shelby Stavely Caruso M.S.CCC-SLP

05/04/2026  
\_\_\_\_\_  
Date

\_\_\_\_\_  
Rhonda Mills, Owasso School Board President

\_\_\_\_\_  
Date



# Acellus Quote

**ACELLUS EDUCATIONAL SERVICES** | 11025 N. Ambassador Drive, Kansas City MO 64153

**Date:** 05/06/2026

**Proposal Valid Through:** 06/05/2026

**Proposal Number:** 1054105

Contact Information	
<b>Owasso Public Schools</b> <a href="#">Edit</a> Owasso Public Schools - Virtual Program 1501 N Ash Street Owasso, OK 74055	<b>Contact:</b> Ms. Charlene Duncan, Director of <a href="#">Edit</a> Special Education <b>Phone:</b> 918-272-8021 <b>Email:</b> charlene.duncan@owassops.org

QTY	DESCRIPTION	PRICE	EXTENDED PRICE
380	Acellus Gold Monthly Student License <ul style="list-style-type: none"> <li>Valid for the 2026/27 School Year</li> <li>Additional students added to Acellus will be billed at the rate of \$79/student/month through the volume discount</li> </ul>	\$ 79.00	\$ 30,020.00
<b>Balance to be Paid:</b>			<b>\$ 30,020.00</b>

Click here to indicate that you have read and agree to the [Standard Purchase and License Terms](#).

ACCEPTED BY:

NAME:	TITLE:	EMAIL:
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PO NUMBER: (Optional)

[PRINT](#)

[Accept this Proposal](#)

## **MEMORANDUM OF UNDERSTANDING**

The (Police Department) City of Owasso, Oklahoma, a municipal corporation (OPD); the Owasso School District, an independent school district of the State of Oklahoma (OPS); upon the allocation of budgeted funds by both parties, pledge to collaborate to deploy/assign three (3) state certified police officers employed by the City of Owasso Police Department in the position of school resource officer (SRO) within the Owasso Public School primary and secondary systems for fiscal year (FY) 2027.

### **I. OBJECTIVES**

1. To provide police officers trained as school resource officers whose primary duties and responsibilities will be assignment to the Owasso Public School District.
2. To develop innovative, systematic, long-term approaches to reduce the incidents of crime on Owasso Public School property and provide protection for Owasso Public School staff, employees, students, and users of the OPS facilities.
3. To provide educational and preventive interdiction services to the OPS staff, employees, and students.
4. To place police officers within and in proximity of the school campuses of the OPS to provide security, crime prevention services, and law enforcement.
5. To continue staffing of three SROs for school years beyond FY 2027, budget permitting; to seek grants and/or additional funding to increase the number of SROs in future school years.

### **II. OWASSO POLICE RESPONSIBILITIES**

1. OPD agrees to provide three certified police officers to work in the Owasso Public Schools during the regular school year of FY 2027, excluding “summer months”, when classes are cancelled due to inclement weather, scheduled holidays, or any other time classes are not in session.
2. OPD agrees to establish the practice of providing extra patrols with regular duty officers to the various schools within the OPS district, call volume and staffing permitting.

3. OPD agrees to provide training, uniforms, uniform cleaning, equipment, equipment repair, vehicle, and vehicle maintenance for three SROs during FY 2027.
4. Prior to a new SRO being assigned to the school district, OPD agrees to conduct a meeting with OPS superintendent and other district leaders, chosen at the discretion of the superintendent, before the SRO is introduced to the school campuses. The meeting will include the chief of police or designee and the new SRO.
5. OPD agrees that involuntary removal of an SRO will include consultation with the OPS superintendent. Further, OPD agrees that if an SRO is removed, steps will be taken to fill the vacancy within 30 days of final disposition of the removal. Final disposition includes any appeals by the officer or arbitrations associated with the removal.
6. OPD agrees that if an SRO voluntarily resigns from the SRO program, the vacancy will be filled within 30 days.
7. OPD agrees that any requests to increase future cost sharing by OPS will be made by February 1, 2027.
8. OPD agrees that if there is a need to discontinue the SRO program or reduce services/staffing/funding of the SRO program for FY 2027, they will notify the school superintendent of this need no later than February 1, 2027. This same notification requirement will be in effect for requests to increase SRO staffing for the upcoming fiscal year.
9. OPD agrees to invoice OPS monthly in the amount of \$16,000 (sixteen thousand dollars) beginning in August 2026 through May 2027 (ten months).

### **III. OWASSO PUBLIC SCHOOL RESPONSIBILITIES**

1. OPS agrees that all employment responsibilities regarding supervision, police related training, salary disbursement, employment files, scheduling, assignments, disciplinary action, and other basic employment duties for the SROs will be the responsibility of the OPD.
2. OPS agrees to provide office space with telephones for SROs. OPS will make every attempt to provide office space at Owasso High School for SROs, space permitting.

3. OPS agrees to allow the SROs to attend professional conferences conducted or sponsored by the OPS for school staff or employees.
4. OPS agrees that assignment of the SROs to duties outside the scope of the position of SRO will be at the discretion of the OPD.
5. OPS agrees that assignment of the SRO is at the discretion of the OPD during “summer months”, when classes are cancelled due to inclement weather, scheduled holidays, or any other time classes are not in session. Further, OPS agrees that assignment of SROs to “summer school” is at the discretion of the OPD.
6. OPS agrees that SROs will not be used for normal disciplinary actions against students unless there is reason to believe that the student’s actions are criminal or there is a risk of violence on the part of the student or student’s parent/guardian.
7. OPS agrees to pay \$160,000 for three SROs for FY 2027 (July 1, 2026 through June 30, 2027); payment will be made in ten monthly installments beginning in August 2026 through May 2027 in the amount of \$16,000 (sixteen thousand dollars).
8. OPS agrees that if OPS has a need to discontinue the SRO program or reduce services/staffing/funding of the SRO program for FY 2027, they will notify the chief of police of this need no later than December 15, 2026. This same notification requirement will be in effect for requests to increase SRO staffing for the upcoming fiscal year.
9. OPS agrees that any previous MOUs with the OPD related to the SRO program will no longer be in effect as of July 1, 2026.
10. OPS agrees that final decisions related to selection and removal of SROs will be made by the chief of police.

IN WITNESS WHEREOF, the parties hereto have caused the Agreement to be executed on the dates herein set forth.

CITY OF OWASSO

DATE OF EXECUTION

By: \_\_\_\_\_  
Chris Garrett  
City Manager

\_\_\_\_\_

STATE OF OKLAHOMA )  
COUNTY OF TULSA )

Before me a notary public on this \_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_, personally appeared \_\_\_\_\_, known to me to be the identical person who executed the within and foregoing instrument, and acknowledged to me that he executed the same as his free and voluntary act and deed for the users and purposes therein set forth.

My Commission Expires:

\_\_\_\_\_

\_\_\_\_\_  
Notary Public

OWASSO SCHOOL DISTRICT

DATE OF EXECUTION

By: \_\_\_\_\_  
President  
Board of Education

\_\_\_\_\_

STATE OF OKLAHOMA )  
COUNTY OF TULSA )

Before me a notary public on this \_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_, personally appeared \_\_\_\_\_ and \_\_\_\_\_, known to me to be the identical persons who executed the within and foregoing instrument, and acknowledged to me that they executed the same as their free and voluntary act and deed for the users and purposes therein set forth.

My Commission Expires:

---

---

Notary Public

Approved as to Form and Legality:

---

Julie Trout Lombardi, City Attorney  
City of Owasso

## Agreement

This Agreement made and entered into this \_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_, by and between the Owasso Public Schools, hereinafter referred to as CLIENT, and the Owasso Police Department, hereinafter referred to as OPD.

Whereas, OPD is in the business of developing and implementing narcotics control programs that may include consultation seminars, lectures, canine searches, and other valuable educational services; and whereas, CLIENT desires that OPD assist CLIENT in developing and implementing such a program at and on its premises.

Now, therefore, in consideration of the mutual covenants and agreements set forth herein, OPD and CLIENT agree as follows:

**Term:** This Agreement shall continue in force and effect for a period of one school year. Either party to this Agreement may cancel the Agreement by notifying the other party in writing within thirty (30) days prior to the date of termination. This Agreement does not include an automatic renewal.

**OPD's Status as Independent Contractors:** It is understood that the duties and services to be carried out by OPD shall be those prescribed by the CLIENT. However, the means of carrying out those duties shall be within the sole discretion of OPD unless otherwise specified, including, but not limited to: the number of officers employed by OPD, the hours and nature of the officers' duties; the manner and techniques employed by the officers in accomplishing the services prescribed by the CLIENT, the tools and materials utilized by the officers in the performance of their duties, and the manner of hiring, training, equipping, and supervising all officers. Further, the payment of federal, state, county, and/or municipal taxes, social security benefits, unemployment compensation taxes, and overtime wages (other than overtime authorized by CLIENT) shall be the sole function and responsibility of OPD. OPD shall assume the status of independent contractor under the terms of the Agreement, to the exclusion of any other employment status including, but not limited to: employee, officer, servant, principal, partner, and/or joint venture.

**Insurance:** OPD will maintain insurance through the City of Owasso.

**Change in the Law:** If there is enacted by law, regulation, promulgation ruling, or other such mandate, by any authority having jurisdiction of the hours of service, rate of pay, working conditions, cost of performing the services herein provided for, or any other such action which affects the subject matter of the Agreement, CLIENT agrees that this Agreement will be subject to revisions and modifications.

**Entire Agreement:** This Agreement contains the full and entire agreement of the parties herein, and any prior agreements, whether written or oral, are of no further force or effect. This Agreement may not be changed orally, but only by an agreement in writing and signed by the party against whom enforcement of any waiver, change, modification, extension, or discharge is sought.

**Illegal substances:** Any drugs, narcotics, drug paraphernalia and/or any other illegal substances discovered as a result of searches conducted by OPD as set out herein shall be confiscated by the officer in charge of the search. Said illegal substances shall be tagged, secured appropriately, and handled and disposed of in accordance with OPD protocol.

**Services:** OPD shall provide and CLIENT shall receive the following:

CLIENT shall receive two visits per week, 1.5 hours per visit, call volume and on-duty K-9 Unit staffing permitting, throughout the FY 2027 regular school year.

OPD K-9 Unit may sign in at each school location as designated by each building principal.

**Extracurricular Activities:** Extracurricular activities shall be included only at the specific request of the building principal.

**Payment Schedule:** CLIENT shall remit payments to OPD in the amount of \$1,000.00. Payment will be made monthly, September 2026 through June 2027. Unless agreed to in writing by the parties herein, CLIENT will not incur expenses under this Agreement in excess of \$10,000.00. All payments required herein shall be forwarded to City of Owasso, Attention: Finance Department, 111 N. Main Street, Owasso, OK 74055.

**IN WITNESS WHEREOF,** the parties hereto have caused the Agreement to be executed on the dates herein set forth.

**CITY OF OWASSO**

By: \_\_\_\_\_  
**Chris Garrett**  
**City Manager**

**STATE OF OKLAHOMA )**  
**COUNTY OF TULSA )**

Before me a notary public on this \_\_\_\_ day of \_\_\_\_\_,  
\_\_\_\_\_, personally appeared \_\_\_\_\_, known  
to me to be the identical person who executed the within and foregoing  
instrument, and acknowledged to me that he executed the same as his  
free and voluntary act and deed for the users and purposes therein set  
forth.

My Commission Expires:

\_\_\_\_\_

\_\_\_\_\_  
**Notary Public**

**OWASSO SCHOOL DISTRICT**

By: \_\_\_\_\_  
**President**  
**Board of Education**

**STATE OF OKLAHOMA )**  
**COUNTY OF TULSA )**

Before me a notary public on this \_\_\_\_ day of \_\_\_\_\_,  
\_\_\_\_, personally appeared \_\_\_\_\_ and  
\_\_\_\_\_, known to me to be the identical  
persons who executed the within and foregoing instrument, and  
acknowledged to me that they executed the same as their free and  
voluntary act and deed for the users and purposes therein set forth.

**My Commission Expires:**

\_\_\_\_\_

\_\_\_\_\_  
**Notary Public**

**Approved as to Form and Legality:**

\_\_\_\_\_  
**Julie Trout Lombardi, City Attorney**  
**City of Owasso**



## Scheduled Maintenance Agreement

This agreement is between Commercial Power Solutions, LLC (CPS) and **Owasso High School** (the Customer) for the scheduled maintenance of the emergency power system located at **12901 E. 86<sup>th</sup> St. North, Owasso, OK 74055**

The following equipment is covered by this agreement:

Generac generator, model # RG04854GNAX, serial # 3001499292

This agreement shall be in effect for a term of one (1) year from the date of the Customer's signature below and will be subject to the following:

1. The Customer shall remit the full amount of **\$495.00, plus any applicable taxes**, payable upon receipt of invoice from CPS (this agreement is not an invoice). Invoices are payable via check, credit card, and cash. There will be a 3% surcharge of the total invoice amount for credit card payments.
2. CPS will perform scheduled maintenance inspections of the above equipment **2 times per year** at approximately **6 month** intervals.
3. All items on the attached inspection form that are applicable to the above equipment will be inspected during each maintenance visit. A copy of the completed form will be provided to the Customer. Any problems or issues with the equipment will be noted on the form and a CPS service consultant will contact the customer to discuss possible courses of action.
4. The following items shall be performed one time per year: Replacing the engine oil, oil filter, and fuel filter as applicable. Independent laboratory analysis of a sample of the used oil.
5. The Customer authorizes CPS, at the time of the maintenance visit, to make repairs needed for proper operation of the equipment as long as the cost of the repairs does not exceed \_\_\_\_\_. Any repair made will be noted on the inspection form.
6. This agreement does not include any parts and services not specifically mentioned in this agreement. Return visits to make repairs are not included in this agreement. All parts and services not covered by this agreement will be billed at CPS's prevailing rates.
7. CPS warrants its work for a period of sixty (60) days from the date of service. This warranty is limited to failure as a result of workmanship and does not include failures resulting from repairs made by someone other than CPS, misuse, negligence, accident, over-loading, over-speeding, fire, flood, vandalism, theft or any other acts beyond the control of CPS.
8. Failure of any new parts installed by CPS during the course of maintenance service shall be covered by the warranty provided by the manufacturer of those parts.
9. CPS's liability under this agreement, if any, shall be limited to the contract amount of this agreement. In no event shall CPS be liable for any consequential, incidental, or exemplary damages, including, but not limited to, loss of profits or down time.
10. This agreement may be cancelled by either party with a thirty (30) day written notice.

Commercial Power Solutions, LLC and the Customer have agreed to the above on this day.

By: Kimberly Mumper  
Commercial Power Solutions, LLC

By: \_\_\_\_\_  
Customer

Date: April 21, 2026

Date: \_\_\_\_\_



**BETWEEN:** Owasso Public Schools  
1501 N. Ash  
Owasso, OK 74055

**AND:**

American Waste Control  
1420 W. 35<sup>th</sup> St.  
Tulsa, OK 74107

### **SERVICE AGREEMENT**

American Waste Control agrees to provide weekly trash removal to all Owasso Public School sites as specified on the attached Waste Control Bid Sheet starting July 1, 2026 through June 30, 2027. These services will be paid monthly in the amount of **\$5,201.45** for the months of August 2026 through May 2027. For the months of July 2026 and June 2026, the monthly amount to be paid will be **\$3965.50**. Any extra scheduled trash pick-ups will be billed to Owasso Public Schools as quoted on the attached bid sheet.

Signed this 20<sup>th</sup> day of April, 2026 by:

*Mike Self*

Sales Mgr. *Mike Self*

American Waste Control

\_\_\_\_\_  
Owasso Public Schools

Site Name	Address Line 1	City	Quantity
OWASSO SCHOOLS - BARNES ELEMEN	7809 E 76TH ST N	OWASSO	2
OWASSO SCHOOLS - STADIUM	12901 E 86th St N	Owasso	1
OWASSO SCHOOLS-6TH GRADE	8101 N 129th East Ave	Owasso	2
OWASSO SCHOOLS-7TH GRADE	1302 N ATLANTA ST	OWASSO	2
OWASSO SCHOOLS-8TH GRADE	13901 E 86th St N	Owasso	2
OWASSO SCHOOLS-ALTERNATIVE ED	202 E Broadway St	Owasso	1
OWASSO SCHOOLS-ATOR ELEM.	1500 N Ash St	Owasso	1
OWASSO SCHOOLS-ATOR ELEM.	1500 N Ash St	Owasso	1
OWASSO SCHOOLS-BAILEY ELEM.	10221 E 96TH ST N	OWASSO	1
OWASSO SCHOOLS-BAILEY ELEM.	10221 E 96TH ST N	OWASSO	1
OWASSO SCHOOLS-BUS GARAGE	301 E 1st St	Owasso	1
OWASSO SCHOOLS-BUS GARAGE	301 E 1st St	Owasso	1
OWASSO SCHOOLS-CENTRAL WHSE	501 E 2nd Ave	Owasso	1
OWASSO SCHOOLS-HIGH SCHOOL	12901 E 86th St N	Owasso	5
OWASSO SCHOOLS-HODSON ELEM.	14500 E 86th St N	Owasso	1
OWASSO SCHOOLS-MID HIGH	8800 N 129th East Ave	Owasso	2
OWASSO SCHOOLS-MILLS ELEM.	8200 N 124th East Ave	Owasso	2
OWASSO SCHOOLS-NORTHEAST ELEM.	13650 E 103RD ST N	OWASSO	2
OWASSO SCHOOLS-SMITH ELEM.	12223 E 91st St N	Owasso	2
OWASSO SCHOOLS-STONE CANYON	7305 N 177th East Ave	Owasso	2
OWASSO PUBLIC SCHOOLS-Morrow	12301 N. 132nd E. Ave	collinsville	2
OWASSO PUBLIC SCHOOL-CENTRAL	501 E 2nd Ave	Owasso	1
OWASSO PUBLIC SCHOOL-CENTRAL	501 E 2nd Ave	Owasso	1
OWASSO PUBLIC SCHOOL-FFA FARM	12901 E 86th St N	Owasso	1
OWASSO PUBLIC SCHOOL-FFA FARM	12901 E 86th St N	Owasso	1



# LOPEZ LAWN CARE



Lawn Service & Landscaping LLC

918-902-2866

## Lawn Care Contract

Lopez Lawn Care will mow 36 times a year March thru November.

(Per RFP scope of work: mow/trimming)

- Baseball Practice Field will be mowed twice a week during active growing period.
- Interior of Baseball Grounds will be hand mowed and bagged once a week.
- All trash will be removed before mowing once a week.
- Will treat Owasso Public Schools mowable turf two times a year with One pre-emergent (Fall)  
\*Will do an extra spray if needed @ no cost.  
And One post-emergent (Spring).  
\*Will do an extra spray if needed @ no cost.
- All Parking lots, sidewalks, and walking surfaces around all properties will be treated during growing season for vegetation growth. If growth continues removal of grass/ weeds will be responsibility of lawn care to remove.
- All Parking lots and sidewalks will be cleaned of debris during the specified contract.
- All Playgrounds will be treated with a non-toxic sterilant to prevent a spreading of unwanted grass/weeds or hand removal grass/weeds to ensure no further spreading of unwanted grass/weeds.
- Will keep trees trimmed at proper height while hauling off all limbs at the time of trimming.
- All flower beds will be cleaned and mulched at all sites.
- Morrow Elementary will also have mulch added around trees.
- Minor Repairs to the irrigation system at ESC and Morrow Elementary. (Replacement Parts provided by Owner)
- The irrigation system will be turned ON & OFF for each season by Lopez Lawn Care.

Total Yearly Price will be \$165,600.00

Owasso Public Schools will be invoiced MONTHLY by the 1<sup>st</sup> Monday of each month.

X

Mario Lopez - Owner 918-902-2866

Date: 04 - 21 - 20

X \_\_\_\_\_

Date: \_\_\_\_\_

Owasso Public Schools Representative



**IMPERIAL**  
MARKETS ★ VENDING ★ FOODSERVICE ★ COFFEE

### **Vending Service Agreement**

This Agreement is made this day April 23rd, 2026, by and between Imperial, LLC., 2020 N. Mingo Rd., Tulsa, OK 74116 and Owasso Public Schools, 1501 N. Ash St., Owasso, OK 74055

1. The Client agrees to allow Imperial to provide vending machines upon Client's business premises subject to the terms and conditions of this agreement.
2. Imperial shall be responsible for installing and maintaining vending equipment which reasonably meets the location's needs.
3. Client grants Imperial the rights to provide snack products as limited to vending services. Imperial will provide merchandise through its vending machines that is reasonably priced and offered in reasonably sized portions. Any change in the wholesale price may result in a change in the selling price. Vending Prices and Products will be determined by Imperial as agreed upon by Client.
4. Imperial will maintain workers compensation insurance, general liability insurance and vehicle insurance at all times. Certificates available on request.
5. Imperial agrees to obtain and display all applicable Federal, State and local licenses.
6. Imperial's personnel will at all times be dressed in clean, neat uniforms and will observe all regulations in effect of premises.
7. Either party may terminate this agreement with cause upon (30) days written notice to the other party.
8. This contract is bound by the laws of the State of Oklahoma. The initial term will begin on July 1<sup>st</sup>, 2026, and will end on June 30<sup>th</sup>, 2027.
9. Client agrees to notify Imperial of any alteration that will affect any of the areas where services are performed. Alterations may include increased workflow, labor hours, holiday employment or special functions.
10. Should the Client feel that Imperial failed to provide proposed service levels, Client will notify Imperial in writing of failure to supply service. Service failures will be limited to equipment or service levels. If within thirty (30) days of the notice of service failure the problem has not been corrected, the Client may cancel the agreement.



**IMPERIAL**  
MARKETS ★ VENDING ★ FOODSERVICE ★ COFFEE

IMPERIALCO.COM



11. Imperial will operate and maintain all vending machines and other equipment in a clean, sanitary condition in accordance with recognized standards for such machines and in accordance with all applicable laws and regulations.
12. This agreement will be made and construed in accordance with the Laws of the State of Oklahoma.
13. The Parties agree to negotiate the removal or relocation of underperforming machine(s). For the purpose of this Agreement, an underperforming machine shall be defined as a machine which has gross sales of less than \$250.00 per month.
14. Imperial agrees to pay a monthly commission of 11% on any machine performing at least \$250.00 per month.
15. The Parties agree to add additional vending machines without requiring an amendment to the Agreement.

Imperial, LLC.  
2020 N. Mingo, Tulsa, OK 74116  
Angela D. Robson

Owasso Public Schools  
1501 N. Ash St., Owasso, OK 74055  
Rhonda Mills – School Board President

*Angela D. Robson*

**05/07/2026**

Date

Date





# OWASSO PUBLIC SCHOOLS



## HVAC BID

### AS PER SPECIFICATIONS

TOTAL BID AMOUNT

\$594,999.96

AMOUNT IN WORDS

Five hundred ninety-four thousand, nine hundred ninety-nine and ninety-six cents

SIGNATURE

Amanole Gully

DATE

4/21/26

ATTACH SEAL IF INCORPORATED





# ***SPECIFICATIONS FOR CONTRACT***

## **DUTIES OF THE CONTRACTOR**

For purposes of this contract, Owasso Public Schools shall be referred to as the "District".

Contractor is to supply all labor for all service calls 24/7/365 throughout the District. Contractor shall be on site within one hour from the time the service call is placed.

A "service call" includes, but is not limited to, broken or malfunctioning equipment, temperature adjustments, water leaks that may be related to HVAC equipment, electrical issues, natural gas issues, or any other issue that the District suspects may involve any heating or A/C unit or system.

Contractor will be an integral part of our energy management team. Therefore, all personnel assigned to the District or who respond to services calls shall be Honeywell certified as well as *Trane* certified on energy management systems. Contractor will attend all energy management meetings when requested by the District at no additional cost, and will assist the district in developing energy management policies and procedures. Contractor will be responsible for monitoring and maintaining temperature controls for the district on a year-round basis. Contractor will also be on call to assist the District in adjusting thermostats throughout the district during extreme weather conditions at no additional cost to the District. Contractor shall obtain, at their own expense, appropriate equipment to monitor and adjust thermostat settings remotely in order to fulfill the provisions of this contract.

Contractor is to perform all preventative maintenance on all equipment District Wide. The schedule for preventative maintenance shall be as follows:

- Contractor to perform preventative maintenance at all district wide sites a total of (4) times a year. (every 3 months) at this time reports of any findings and irregularities will be submitted and reported to the Director of Facilities.

Contractor is to supply all air filters (merv 8 minimum) as well as all dynamic filtration filters district wide.

Contractor is to supply all the refrigerants needed for the school year 2026-2027

Contractor to supply all chemicals and labor costs needed for cleaning condenser coils, this will be performed on as needed basis with at least one (1) complete



**cleaning district wide per year. This is to be documented and a copy provided to the Director of Facilities.**

**Contractor will supply all contactors (40 amp and below), transformers, fuses (100 amp/600 v and below) all wiring items (connectors) all heating ignition controls for all rooftop units, all drive belts, and all equipment needed for brazing copper refrigerant lines.**

**Contractor will provide eddy current tube analysis on the three (3) chillers located at the high school.**

**Contractor will provide all labor needed for unit replacement. This will include setting all curbs, setting the units, re-connection of all ductwork and line voltage and low voltage wiring for the complete operation of all new equipment.**

**Contractor will provide spot coolers/heaters for temporary cooling/heating if repairs are extended over 24 hours.**

**Contractor will oversee and file for all available utility rebates and/or manufacturer rebates. All rebate payments will be made to Owasso Public Schools, ISD 11.**

## **DUTIES OF THE DISTRICT**

**The District will supply all compressors, motors, fan blades as well as evaporator blower assemblies, fuses above 100amp/600v, as well as all breakers and disconnects.**

**The District will supply all lifting services for new units, large compressor/motor replacements.**

**The District will supply all circuit boards, variable frequency drive controls, boiler controls, and all parts associated with energy management controls.**

**The District will supply all heat exchanger assemblies and associated parts (induced draft motors and gaskets).**

**The District will supply all parts needed for the three (3) Trane chillers located at the high school as well as any pumps, motors, glycol, and automated water valves district wide.**

**The District will supply all variable air volume controls and equipment replacements.**



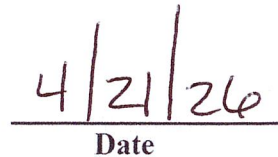
The District will supply all parts needed for any chill water piping repairs as well as all hoses and fittings associated with any chilled water system.

The District will supply an area for the contractor to preform daily meetings and store filters. The district will provide the utilities for this area and the Contractor will provide furnishings, phone, and security services.

## INSURANCE REQUIREMENTS

Contractor is required to be fully insured for workers compensation, general liability, and auto insurance and provide the District with appropriate insurance certificates. General liability policy limits shall be at least \$1,000,000 per occurrence, \$100,000 for damage to premises per occurrence, \$5,000 medical per person, \$1,000,000 personal injury, \$2,000,000 general aggregate, and \$2,000,000 products and completed operations aggregate. Auto insurance shall be \$1,000,000 for combined single limit per accident on scheduled autos. Workers Compensation and Employer's Liability coverage must have policy limits of \$500,000 for each accident, \$500,000 disease per employee, and \$500,000 disease policy limit. The certificate holder (the District) shall be listed as an additional insured on both the general liability and auto coverage.

  
Contractor Signature

  
Date

\_\_\_\_\_  
Owasso Public Schools

\_\_\_\_\_  
Date



## FINALSITE ORDER

This **Finalsite Order (the 'Order')** is entered into by and between Active Internet Technologies, dba Finalsite ('Finalsite') and Owasso Public Schools ("Customer") and sets forth the terms of Customer's use of the products and services set forth below ("**Pricing Summary**"). This Order, together with the Master Terms and Conditions for Services (the "**Master Terms**") located at <http://www.finalsite.com/masterterms/useducationagencies> and incorporated herein by this reference, form the entire agreement between the parties in respect of the products and services set forth below. Each of the individuals executing this Order represent and warrant that he or she is authorized to execute this Order on behalf of Customer or Finalsite, as applicable. Unless otherwise specified herein, any capitalized terms used in this Order shall have the meaning defined in the Master Terms. The "**Effective Date**" of this Order is the date on which both parties have signed this Order as reflected in the signature lines below.

In consideration of the promises set forth herein, and other good and valuable consideration, the receipt of which are hereby acknowledged, the parties hereby agree as follows:

### A. Pricing Summary

\* Indicates products added

[x] Indicates products removed

#### CMS Platform

Platform	
* Communications Core Platform - Districts View a detailed description of what is included in your software package here <a href="http://www.finalsite.com/dcc">http://www.finalsite.com/dcc</a>	

Setup and Creative and Professional Services	
* Theme Flex - District View a detailed description of what is included in your software package here <a href="http://finalsite.com/sowptf">finalsite.com/sowptf</a>	* Content Migration
* Google Translate	

Add-Ons	
* Support Plan - Standard	* Azure/Active Directory Integration

Products Included in Communications Core Platform - Districts	
Basic Site Search	HTTPS Implementation
Basic Support with integrated ticketing	LDAP/Google Authentication (Network SSO)
Blog, News and Subscriptions with Finalsite Posts (Unlimited)	Live Webinar Training
Data Imports through Finalsite Support (4/year)	Mobile-Friendly, Responsive Design
Digital Asset Management & Document Library with Resources	Website cloud storage (160 GB)
District Site and 15 Additional Sites	Page-Based Notifications (Page Pops)
FERPA-compliant Hosting, Security and Integrated CDN	Searchable Knowledge Base and Video Access
Finalsite Composer Content Management System	Social Media Feeds (16)
Faculty/Staff Directory & Role	Tiered Permissions and User Management



Customer: Owasso Public Schools  
Created By: Samuel Alaniz Jr  
New Contract  
11/7/2023  
Proposal Valid for 30 days

Finalsite Payments by BlueSnap	Unlimited Calendars (Incl. Integration)
Forms (Unlimited)	Unlimited Published Pages

**Special Provisions:**

- 1). \$10,000 for the Theme Flex - District Design will be invoiced 12/29/2023 along with Period 1 reflected in the schedule below.
- 2.) Agreement includes 500 pages of content migration.

**Services: Initial Term and Fees:**

The initial term of this Order is for the (5) year period beginning from the Effective Date, unless otherwise outlined in the schedule below (the "Initial Term").

Fees for the Initial Term for the Services specified in the table above are set forth below:

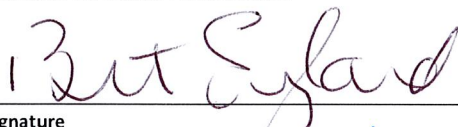
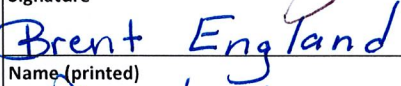
<b>Total Setup Cost (USD)</b>
\$10,000

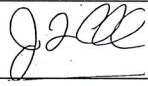
Schedule	Amount
Period 1 - Dec 01 2023	\$ 9,250
Period 2 - Jul 01 2024	\$ 18,500
Period 3 - Jul 01 2025	\$ 18,500
Period 4 - Jul 01 2026	\$ 18,500
Period 5 - Jul 01 2027	\$ 18,500

**B. Payment Terms**

1. All fees for the initial year of this Order shall be due as follows: (i) Set Up fees shall be invoiced on the Effective Date of this Order and shall be due and payable upon receipt of invoice; (ii) fees for Year 1 (described in the fee table above) shall be invoiced on the Effective Date of this Order or the first day of Year 1, whichever is later, and shall be due and payable upon receipt of invoice; (iii) fees for each subsequent Year of the Initial Term, and for each Renewal Term, shall be invoiced on the commencement of such Year or Renewal Term (as applicable) and shall be due and payable upon receipt of invoice. Fees for any other Services, and for reimbursable expenses, shall be invoiced in accordance with the Master Terms or this Order and shall be due and payable upon receipt of invoice.
2. Unless otherwise specified in the Special Provisions above, this Order Form shall be renewed automatically for successive periods of (4) years (each a "Renewal Term") after the expiration of the Initial Term and any subsequent Renewal Term, unless Client provides Finalsite, or Finalsite provides Client, with a written notice to the contrary ninety (90) days prior to the end of the Initial Term or Renewal Term, as applicable.
3. Unless otherwise specified, all dollars (\$) are United States currency.
4. Sales/VAT Tax: If applicable, a copy of Customer's Sales/VAT Tax Direct Pay Certificate or its Sales/VAT Tax Exemption Certificate must be returned with this Order Form. Otherwise, Finalsite will invoice Customer for applicable sales, use and other transactional taxes due in connection with the Services or the fees due therefor.
5. Except as otherwise specified in this Order, fees are subject to increase in accordance with the applicable provisions of the Master Terms.

Any SOWs to which links are provided above in Section A, "Pricing Summary," are incorporated into this Order by reference, and any professional services described therein are included as part of your software package. By signing below, Finalsite and Customer each agree to the terms and conditions of this Order, the Master Terms, and any SOWs incorporated by reference. By signing below, Finalsite and Customer each agree to the terms and conditions of this Order and the Master Terms.

On Behalf Of: Owasso Public Schools

Signature

Name (printed)
President
Title (printed)
Date
11-13-2023

Active Internet Technologies ('Finalsite')

Signature
Name (printed)
Jim Calabrese
Title (printed)
CFO
Date
11/8/2023

### C. Client Contact Information

Please fill out the following information, which will be used by our deployment & accounting teams.

<b>Billing Contact</b> Renee Atkinson
<b>Title</b> Encumbrance Clerk
<b>Address</b> 1501 North Ash Street
<b>City, State Zip</b> Owasso, OK 74055
<b>Phone</b> 918-272-5367
<b>Email</b> renee.atkinson@owassops.org

<b>Project Contact</b> Jordan Korhage
<b>Title</b> Director of Communications
<b>Phone</b> 918-928-4385
<b>Email</b> jordan.korhage@owassops.org

<b>*Executive Sponsor (Superintendent, Head of School, CFO, etc.)</b> Dr. Margaret Coates
<b>Title</b> Superintendent
<b>Email</b> margaret.coates@owassops.org

\*The Executive Sponsor should be separate from the Project Contact and is typically the Superintendent, Head of School, Business Manager, CFO, etc.

This **Finalsite Order (the 'Order')** is entered into by and between Active Internet Technologies, dba Finalsite ('Finalsite') and Owasso Public Schools ("Customer") and sets forth the terms of Customer's use of the products and services set forth below ("**Pricing Summary**"). This Order, together with the Master Terms and Conditions for Services (the "**Master Terms**") located at <https://www.finalsite.com/masterterms/useducationagencies> and incorporated herein by this reference, form the entire agreement between the parties in respect of the products and services set forth below. Each of the individuals executing this Order represent and warrant that he or she is authorized to execute this Order on behalf of Customer or Finalsite, as applicable. Unless otherwise specified herein, any capitalized terms used in this Order shall have the meaning defined in the Master Terms.

In consideration of the promises set forth herein, and other good and valuable consideration, the receipt of which are hereby acknowledged, the parties hereby agree as follows:

**A. Products and Services Pricing Summary**

*\* Indicates products added*

**[X]** *Indicates products removed*

**CMS Platform**

<b>Setup and Creative and Professional Services</b>	
* <b>Data Remediation Services</b> View a detailed description of what is included in your software package here <a href="http://www.finalsite.com/data-remediation">www.finalsite.com/data-remediation</a>	
<b>Add-Ons</b>	
* <b>Support Plus</b>	

**Communications**

<b>Platform</b>	
* <b>Messages XR Enterprise</b>	
<b>Setup</b>	
* <b>Messages XR Enterprise Setup</b> View a detailed description of what is included in your software package here <a href="http://www.finalsite.com/sowmxre">www.finalsite.com/sowmxre</a>	* <b>Messages XR Enterprise SMS Plus Setup</b>
<b>Add-Ons</b>	
* <b>Messages XR Enterprise SMS Plus</b>	

The above products, to include but not limited to (modules, integration, design and consulting) will be billed upon contract signature.



**Application Services Subscriptions Costs:**

Total Cost/Year during the Initial Term of this Order, subject to adjustment for any renewal term as provided below.

<b>Total Setup Cost (USD)</b>
\$ 0

<b>Schedule</b>	<b>Addendum Amount</b>
Period 1 - Jul 01 2025	\$ 18,500
Period 2 - Jul 01 2026	\$ 18,500
Period 3 - Jul 01 2027	\$ 18,500

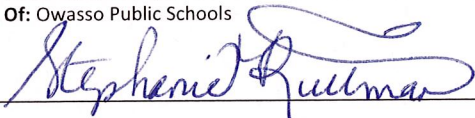
**B. Additional Terms**

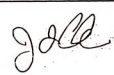
1. Initial Term: This addendum will take effect on the date this document is signed by both parties and remain in effect for the term stated in the agreement.
2. Unless otherwise specified in the Special Provisions above, this Order Form shall be renewed automatically for successive periods of (4) years (each a "Renewal Term") after the expiration of the Initial Term and any subsequent Renewal Term, unless Customer provides Finalsite, or Finalsite provides Customer, with a written notice to the contrary ninety (90) days prior to the end of the Initial Term or Renewal Term, as applicable.
3. Effective Date: Upon execution of this Order.
4. Finalsite standard maintenance and support is included in the subscription fees for Application Services set forth in this Order.
5. All Upgrades and Updates to the Application Services are included in the subscription fees for Application Services set forth in this Order.
6. In addition to Customer's obligations to pay the fees described in the fee table above, Customer agrees to reimburse Finalsite for all travel and other out-of-pocket expenses reasonably incurred by Finalsite in rendering any services described in this Order.

**C. Payment Terms**

1. All fees for the initial year of this Order shall be due upon execution of this Order. Unless otherwise specified, all dollars (\$) are United States currency. All fees for subsequent years shall be due upon the annual anniversary of the effective date of this Order.
2. Customer shall be invoiced for amounts due in respect of the first year of the Initial Term upon execution of this Order Form.
3. Sales Tax: If applicable, a copy of your Sales Tax Direct Pay Certificate or your Sales Tax Exemption Certificate must be returned with this Order Form.

Any SOWs to which links are provided above in Section A, "Pricing Summary," are incorporated into this Order by reference, and any professional services described therein are included as part of your software package. By signing below, Finalsite and Customer each agree to the terms and conditions of this Order, the Master Terms, and any SOWs incorporated by reference. By signing below, Finalsite and Customer each agree to the terms and conditions of this Order and the Master Terms.

On Behalf Of: Owasso Public Schools

Signature
Stephanie Ruttmann
Name (printed)
President
Title (printed)
5-12-2025
Date

Active Internet Technologies ('Finalsite')
Signature

Name (printed)
Jim Calabrese
Title (printed)
Chief Executive Officer
Date
5/6/2025

Phone: 405-523-2162

Email: [kking@unitedsystemsok.com](mailto:kking@unitedsystemsok.com)

Web: <http://www.unitedsystemsok.com>

## 2026 Dell PowerEdge R440 and R240 Renewal

**Prepared for:**

**Owasso Ind School Dist 11**  
 1501 N. Ash  
 Owasso, OK 74055  
 Michelle Baker  
 (918) 706-3427  
[michelle.baker@owassops.org](mailto:michelle.baker@owassops.org)

**Prepared by:**

**United Systems, LLC**  
 Kevin King  
 405-523-2162  
 Fax 405-523-2185  
[kking@unitedsystemsok.com](mailto:kking@unitedsystemsok.com)

**Quote Information:**

**Quote #: 019677**  
 Version: 2  
 Delivery Date: 05/04/2026  
 Expiration Date: 05/10/2026

Dell PowerEdge R440 Renewal		Price	Qty	Ext. Price
<b>Model: DELL PowerEdge R440</b> <b>Service Tag: 3D657X2</b> <b>Coverage Start Date: May 22, 2026</b> <b>Coverage End Date: June 30, 2027</b> <b>Coverage quoted through EOL date.</b> <b>Support: Post Standard Support and 4hr On-Site Service After Problem Diagnosis Reinstate</b>				
DELL-POST-STANDARD-SUPPORT	Post Standard Support	\$1,547.00	1	\$1,547.00
<b>Subtotal</b>				<b>\$1,547.00</b>

Dell PowerEdge R240 Renewal		Price	Qty	Ext. Price
<b>Model: DELL PowerEdge R240</b> <b>Service Tag: 3VRF2N3</b> <b>Coverage Start Date: April 7, 2026</b> <b>Coverage End Date: June 30, 2027</b> <b>Support: ProSupport 4-Hour 7x24 Onsite Service</b> <b>Support: ProSupport: 7x24 HW/SW Technical Support and Assistance</b>				
DELL-PROSUPPORT-7X24-HW	Dell ProSupport 7X24 HW / Service	\$365.76	1	\$365.76
<b>Subtotal</b>				<b>\$365.76</b>



Phone: 405-523-2162

Email: [kking@unitedsystemsok.com](mailto:kking@unitedsystemsok.com)

Web: <http://www.unitedsystemsok.com>

## 2026 Dell IDPA DP4400 Renewals

**Prepared for:**

**Owasso Ind School Dist 11**  
 1501 N. Ash  
 Owasso, OK 74055  
 Russell Thornton  
 (918) 376-1293  
[russell.thornton@owassops.org](mailto:russell.thornton@owassops.org)

**Prepared by:**

**United Systems, LLC**  
 Kevin King  
 405-523-2162  
 Fax 405-523-2185  
[kking@unitedsystemsok.com](mailto:kking@unitedsystemsok.com)

**Quote Information:**

**Quote #: 019729**  
 Version: 1  
 Delivery Date: 04/16/2026  
 Expiration Date: 04/23/2026

Dell IDPA DP4400 Renewal		Price	Qty	Ext. Price
<b>Model: DELL IDPA DP4400 24TB 8X10G SFP</b> <b>Serial Numbers: APM00192313859, APM00192313860</b> <b>Coverage Start Date: July 1, 2026</b> <b>Coverage End Date: June 30, 2027</b> <b>Support: ProSupport 4HR Hardware Support</b>				
APM0019231 3859	IDPA DP4400 24TB 8X10G SFP - Dell ProSupport 4HR Hardware Support	\$9,691.45	1	\$9,691.45
APM0019231 3860	IDPA DP4400 24TB 8X10G SFP - Dell ProSupport 4HR Hardware Support	\$9,691.45	1	\$9,691.45
<b>Subtotal</b>				<b>\$19,382.90</b>

Phone: 405-523-2162

Email: [kking@unitedsystemsok.com](mailto:kking@unitedsystemsok.com)Web: <http://www.unitedsystemsok.com>

Quote Summary		Amount
Dell IDPA DP4400 Renewal		\$19,382.9
	<b>Total:</b>	<b>\$19,382.9</b>

Pricing is valid for 30 days. Signature below constitutes acceptance of this quotation and authorizes United Systems, Inc. to proceed to supply all goods and services as stated. I hereby declare acceptance of payment terms, which is due upon receipt of invoice. Product will be invoiced when delivered and services will be invoiced as they are completed. Items that are returned or cancelled after written approval will be charged a restocking fee.

**United Systems, LLC****Owasso Ind School Dist 11**

Signature: *Kevin King*  
Name: Kevin King  
Title: Sales & Client Success Coordinator  
Date: 04/16/2026

Signature: \_\_\_\_\_  
Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Date: \_\_\_\_\_

Phone: 405-523-2162

Email: kking@unitedsystemsok.com

Web: http://www.unitedsystemsok.com

## 2026 Dell Renewals - PowerProtect 6900 & DS60, Dell Cyber Data Protect, Dell S4112T Switch

**Prepared for:**

**Owasso Ind School Dist 11**  
 1501 N. Ash  
 Owasso, OK 74055  
 Michelle Baker  
 (918) 706-3427  
 michelle.baker@owassops.org

**Prepared by:**

**United Systems, LLC**  
 Kevin King  
 405-523-2162  
 Fax 405-523-2185  
 kking@unitedsystemsok.com

**Quote Information:**

**Quote #: 019789**  
 Version: 1  
 Delivery Date: 05/04/2026  
 Expiration Date: 05/11/2026

Dell Renewal		Price	Qty	Ext. Price
6852876	<b>EMC - Renewal</b>  START DATE: July 1, 2026 END DATE: June 30, 2027	\$36,128.84	1	\$36,128.84
<b>BELOW PRICING FOR INFORMATION PURPOSES ONLY - EACH SECTION TOTAL IS INCLUDED IN RENEWAL TOTAL PRICE</b>				
			<b>Subtotal</b>	<b>\$36,128.84</b>

Dell PowerProtect DD 6900 Renewal		Price	Qty	Ext. Price
<b>Model: Dell PowerProtect Controller DD6900</b>				
<b>Model Number: 852-9727, 827-4097, 866-5603, 852-9713, 827-6582, 827-7107, 827-6558, 827-7103, 827-4090</b>				
<b>Coverage Start Date: July 1, 2026</b>				
<b>Coverage End Date: June 30, 2027</b>				
<b>Agreement: 34177607</b>				
852-9727	<b>Dell 1 Year ProSupport Plus Mission Critical DD Raw DS6X 4TB Active 1TB Sftwr Spt-Maint</b>	\$206.32	60	\$12,379.20
827-4097	<b>Dell ProSupport Plus: Mission Critical 7x24 HW/SW Tech Support and Assistance</b>	\$5,282.42	1	\$5,282.42
866-5603	<b>Dell ProSupport Plus Mission Critical Operating Environment Sftwr Spt-Maint</b>	\$2,548.38	1	\$2,548.38
852-9713	<b>Dell ProSupport Plus Mission Critical DD Raw DS6X 4TB Active 1TB Sftwr Spt-Contract</b>	\$0.00	1	\$0.00
827-6582	<b>Dell ProSupport Plus Mission Critical, DD Replication, 1TB, Software Support/Maintenance 1 Year</b>	\$16.69	60	\$1,001.40

Phone: 405-523-2162

Email: kking@unitedsystemsok.com

Web: http://www.unitedsystemsok.com

Dell PowerProtect DD 6900 Renewal		Price	Qty	Ext. Price
827-7107	Dell ProSupport Plus Mission Critical, DD Replication, 1TB, Software Support, Contract	\$0.00	1	\$0.00
827-6558	Dell ProSupport Plus Mission Critical, DD Boost, 1TB, Software Support/Maintenance 1 Year	\$12.62	60	\$757.20
827-7103	Dell ProSupport Plus Mission Critical, DD Boost, 1TB, Software Support, Contract	\$0.00	1	\$0.00
827-4090	Dell ProSupport Plus: Mission Critical 4-Hour 7x24 On-Site Service with Emergency Dispatch	\$3,521.74	1	\$3,521.74
<b>Subtotal</b>				<b>\$25,490.34</b>

Dell PowerProtect DD DS60 Renewal		Price	Qty	Ext. Price
<b>Model: Dell PowerProtect DD DS60</b> <b>Service Tag: 4VMPJM3</b> <b>Model Number: 827-4761, 885-0379, 827-4754</b> <b>Coverage Start Date: July 1, 2026</b> <b>Coverage End Date: June 30, 2027</b> <b>Agreement: 34177607</b>				
827-4761	Dell ProSupport Plus: Mission Critical 7x24 HW/SW Tech Support and Assistance	\$308.59	1	\$308.59
885-0379	Dell ProSupport Plus Mission Critical 4 Hour HDD 15X4TB Capacity Pack Add-On 1 Year	\$5,664.07	1	\$5,664.07
827-4754	Dell ProSupport Plus: Mission Critical 4-Hour 7x24 On-Site Service with Emergency Dispatch	\$205.73	1	\$205.73
<b>Subtotal</b>				<b>\$6,178.39</b>

Dell Cyber Recovery Data Protect Renewal		Recurring	Price	Qty	Ext. Recurring	Ext. Price
<b>Model: Dell Cyber Recovery Data Protect</b> <b>Service Tag: GLKC1K3</b> <b>Model Number: 838-3972</b> <b>Coverage Start Date: July 1, 2026</b> <b>Coverage End Date: June 30, 2027</b> <b>Agreement: 34177607</b>						
838-3972	Dell ProSupport Plus Mission Critical Cyber Recovery Vault Software Support-Maintenance	\$0.00	\$0.00	1	\$0.00	\$0.00

Phone: 405-523-2162

 Email: [kking@unitedsystemsok.com](mailto:kking@unitedsystemsok.com)

 Web: <http://www.unitedsystemsok.com>

Dell Cyber Recovery Data Protect Renewal	Recurring	Price	Qty	Ext. Recurring	Ext. Price
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Dell S4112T Switch Renewal		Price	Qty	Ext. Price
<b>Model: Dell S4112T-ON Switch</b> <b>Service Tag: HQPYV43</b> <b>Coverage Start Date: July 1, 2026</b> <b>Coverage End Date: June 30, 2027</b> <b>Agreement: 34177607</b>				
848-8592	Dell ProSupport Plus OS10 Enterprise Software Support-Maintenance	\$231.27	1	\$231.27
817-7349	Dell ProSupport Plus:Mission Critical 4-Hour 7x24 On-Site Service with Emergency Dispatch	\$1,686.27	1	\$1,686.27
817-7371	Dell ProSupport Plus Mission Critical:7x24 HW/SW Technical Support and Assistance	\$2,542.25	1	\$2,542.25
<b>Subtotal</b>				<b>\$4,459.79</b>



CERTIFICATE OF APPROVAL

May 11, 2026

Purchase Orders to be approved by the Board of Education:

**2025-2026 General Fund**

		<u>P.O. Nos.</u>	
<i>VENDORS</i>		1696-1724	24,009.74
<i>VENDORS</i>	Change Orders		500.00
			<u>\$ 24,509.74</u>

**2025-2026 Building Fund**

		<u>P.O. Nos.</u>	
<i>VENDORS</i>		96	894.67
<i>VENDORS</i>	Change Orders		0.00
			<u>\$ 894.67</u>

**2025-2026 Child Nutrition Fund**

		<u>P.O. Nos.</u>	
<i>VENDORS</i>		50	295.00
<i>VENDORS</i>	Change Orders		0.00
			<u>\$ 295.00</u>

**2025-2026 Bond Fund 31**

		<u>P.O. Nos</u>	
<i>VENDORS</i>		417-420	36,246.45
<i>VENDORS</i>	Change Orders		0.00
			<u>\$ 36,246.45</u>

**2025-2026 Bond Fund 32**

<i>VENDORS</i>		<u>P.O. Nos</u>	
<i>VENDORS</i>	Change Orders	5	61,000.00
			<u>0.00</u>
			<u>\$ 61,000.00</u>

**2025-2026 Bond Fund 35**

<i>VENDORS</i>		<u>P.O. Nos.</u>	
<i>VENDORS</i>	Change Orders		0.00
			<u>0.00</u>
			<u>\$ -</u>

**2025-2026 Bond Fund 39**

<i>VENDORS</i>		<u>P.O. Nos.</u>	
<i>VENDORS</i>	Change Orders		0.00
			<u>0.00</u>
			<u>\$ -</u>

**2025-2026 Bond Fund 05-BOK**

<i>VENDORS</i>		<u>P.O Nos.</u>	
<i>VENDORS</i>	Change Orders	27-32	2,000,344.00
			<u>0.00</u>
			<u>\$ 2,000,344.00</u>

## Purchase Order Register

Options: Year: 2025-2026, Fund(s): 11 - GENERAL, Date Range: 4/23/2026 - 5/6/2026

PO No	Date	Vendor No	Vendor	Description	Amount
1696	04/28/2026	276	WALMART #168	JOM Summer Program Supplies	150.00
1697	04/28/2026	86798	KASEY L SUTTLE	PER DIEM - OKASBO - 4/27-29	137.50
1698	04/28/2026	88654	KELSIE BILLETER	PER DIEM - OKASBO - 4/27-29	137.50
1699	04/28/2026	86393	PHILLIP S STORM	PER DIEM - OKASBO - 4/27-29	137.50
1700	04/28/2026	87173	KELSEY RENAE SNYDER	PER DIEM - OKASBO - 4/27-29	137.50
1701	04/28/2026	85147	SHEA L SWOFFORD	PER DIEM - OKASBO - 4/27-29	137.50
1702	04/30/2026	18996	LITERACY RESOURCES, LLC	Pre-K Phonemic Awareness Book-Hodson-D. Testa	101.00
1703	04/30/2026	11351	AMAZON	Instructional Supplies-Bailey	252.79
1704	04/30/2026	18581	Bjorem Speech Publications, LLC	Supplies for Speech Path at Hodson Elem	468.96
1705	04/30/2026	11351	AMAZON	Supplies and Materials	114.55
1706	04/30/2026	11351	AMAZON	Green - Label/Spike Tape	125.00
1707	05/01/2026	18987	ELIZABETH SEVENOAKS	Basket Weaving Instruction	150.00
1708	05/01/2026	20385	TONYA VAUGHN	Basket Reed Instruction	200.00
1709	05/01/2026	16011	CRYSTAL HANNA	Clay Craft Instruction	200.00
1710	05/01/2026	18987	ELIZABETH SEVENOAKS	Basket Weaving Instruction	200.00
1711	05/01/2026	15170	ALICE WILDER	Cultural Craft Instruction	200.00
1712	05/01/2026	11351	AMAZON	HEART/MINI DRONE COMBOS, DRONE CHARGERS	3,471.76
1713	05/01/2026	11351	AMAZON	MAYFIELD/DESK CHAIR	151.00
1714	05/01/2026	11351	AMAZON	Baptist Children's Home Supplies	400.00
1715	05/01/2026	5612	GREAT EXPECTATIONS-NSU	Rejoice-Registration GE Summer Institute	1,500.00
1716	05/01/2026	4987	KAGAN PUBLISHING INC	Rejoice-Registration Day 1 Kagan PD May 28	498.00
1717	05/01/2026	4987	KAGAN PUBLISHING INC	Rejoice - Kagan PD Day 2 May 29	1,743.00
1718	05/01/2026	10440	SOLUTION TREE	Rejoice - Solution Tree PD May 27-29, 2026	6,152.00
1719	05/04/2026	954	THE MATH LEARNING CENTER	Instructional Supplies-Bailey-Tiffanie Palmer	2,486.00
1720	05/05/2026	11950	TES PRODUCTIONS, INC	Principal's microphone needs fixed	500.00
1721	05/05/2026	18417	MARRIOTT INTERNATIONAL INC	WIDA Conference Hotel - Sept 15-18, 2026	1,968.18
1722	05/05/2026	9673	WISCONSIN CTR FOR ED PROD AND SVCS	WIDA Conference Hotel - Sept 15-18, 2026	1,390.00
1723	05/05/2026	20457	CHARLES PRECIADO	Native American Veteran Presentation	100.00
1724	05/05/2026	5732	SAM'S CLUB	Classroom Storage Cabinets	800.00
<b>Non-Payroll Total:</b>					<b>\$24,009.74</b>
<b>Payroll Total:</b>					<b>\$0.00</b>
<b>Report Total:</b>					<b>\$24,009.74</b>

Change Order Listing

**Options:** Fund(s): 11 - GENERAL, Year: 2025-2026, ReferenceDate: PO Date, Date Range: 4/23/2026 - 5/6/2026, PO Range: 1 - 1695, Minimum Percentage Change: 20.00%, Include Negative Changes: False

PO No	Date	Vendor No	Vendor	Description	Amount
1374	02/19/2026	20365	ALEXANDRIA HOLLER	King - Musical Choreographer	500.00
<b>Non-Payroll Total:</b>					<b>\$500.00</b>
<b>Payroll Total:</b>					<b>\$0.00</b>
<b>Report Total:</b>					<b>\$500.00</b>

# Owasso Public Schools

## Purchase Order Register

**Options:** Year: 2025-2026, Fund(s): 21 - BUILDING, Date Range: 4/23/2026 - 5/6/2026

<b>PO No</b>	<b>Date</b>	<b>Vendor No</b>	<b>Vendor</b>	<b>Description</b>	<b>Amount</b>
96	04/28/2026	19585	FOUR STATE MAINTENANCE SUPPLY INC	Sanitary Napkin Receptacles & Gloves District Wide	894.67
<b>Non-Payroll Total:</b>					<b>\$894.67</b>
<b>Payroll Total:</b>					<b>\$0.00</b>
<b>Report Total:</b>					<b>\$894.67</b>

Purchase Order Register

Options: Year: 2025-2026, Fund(s): 22 - CHILD NUTRITION, Date Range: 4/23/2026 - 5/6/2026

PO No	Date	Vendor No	Vendor	Description	Amount
50	04/28/2026	20140	VEND-UCATION LLC	Technician Training Registration	295.00

**Non-Payroll Total:** \$295.00

**Payroll Total:** \$0.00

**Report Total:** \$295.00

Purchase Order Register

Options: Year: 2025-2026, Fund(s): 31 BOND - 2022, Date Range: 4/23/2026 - 5/6/2026

PO No	Date	Vendor No	Vendor	Description	Amount
417	04/30/2026	19230	BEN HURT	Wrapping of Vehicle	1,117.70
418	05/04/2026	17983	MACMILLAN HOLDINGS LLC	new AP Government course-OHS East-Megan Thames	6,066.87
419	05/06/2026	2010	UNITED SYSTEMS LLC	Aruba Renewal	14,795.10
420	05/06/2026	2010	UNITED SYSTEMS LLC	DELL S Series Switch Support Renewal	14,266.78
<b>Non-Payroll Total:</b>					<b>\$36,246.45</b>
<b>Payroll Total:</b>					<b>\$0.00</b>
<b>Report Total:</b>					<b>\$36,246.45</b>

# Owasso Public Schools

## Purchase Order Register

**Options:** Year: 2025-2026, Fund(s): 32 BOND - 2025, Date Range: 4/23/2026 - 5/6/2026

PO No	Date	Vendor No	Vendor	Description	Amount
5	05/06/2026	9446	THE STACY GROUP	8th Grade Design Fee	61,000.00

**Non-Payroll Total:** \$61,000.00

**Payroll Total:** \$0.00

**Report Total:** \$61,000.00

Purchase Order Register

Options: Year: 2025-2026, Fund(s): 05 BOK 2025, Date Range: 4/23/2026 - 5/6/2026

PO No	Date	Vendor No	Vendor	Description	Amount
27	04/28/2026	20003	DUVALL ELECTRIC LLC	Tennis Court Lighting Upgrade	161,532.00
28	04/30/2026	19835	SECONDARY RHODES	Smith Roof Replacement and associated work	1,484,334.00
29	04/30/2026	20178	WILLIAM A HARRISON INC	Replace 3 RTUs and extend curbs at Smith	57,340.00
30	04/30/2026	20455	PICKLETILE LLC	Tennis Courts Resurfacing	163,138.00
31	05/01/2026	20454	HAPPY PLAYGROUNDS LLC	Playground Shade for Bailey	10,000.00
32	05/06/2026	9446	THE STACY GROUP	8th Grade Design Fee	124,000.00
<b>Non-Payroll Total:</b>					<b>\$2,000,344.00</b>
<b>Payroll Total:</b>					<b>\$0.00</b>
<b>Report Total:</b>					<b>\$2,000,344.00</b>

# Owasso Public Schools

## Cash Balances

Options: Fiscal Years: 2026, Funds: 60, As Of Date: 4/30/2026, Account Types: AC

### Cash By Account and Fund

AC 0110	ROGERS COUNTY BANK				
2026	60	60 - ACTIVITY FUND			\$3,565,332.84
			Total AC	0110	<u>\$3,565,332.84</u>
AC 0111	RCB - SPECIAL ACCT				
2026	60	60 - ACTIVITY FUND			\$0.00
			Total AC	0111	<u>\$0.00</u>
					<u><u>\$3,565,332.84</u></u>

### Cash By Fund

2026	60	60 - ACTIVITY FUND			\$3,565,332.84
					<u><u>\$3,565,332.84</u></u>



# Owasso Public Schools

## Revenue/Expenditure Summary

Options: Fund: 60, Date Range: 7/1/2025 - 4/30/2026

	Begin Balance	Receipts	Adjusting Entries	Payments	Cash End Balance	Unpaid POs	End Balance
801 ESC ACTIVITY FUND	\$0.00	\$59,903.77	\$212,412.54	\$31,593.65	\$240,722.66	\$10,041.40	\$230,681.26
804 CN REFUND SUB ACCT	\$0.00	\$10,122.85	\$0.00	\$3,492.50	\$6,630.35	\$82.55	\$6,547.80
805 OHS ACTIVITY	\$0.00	\$30,125.00	\$143,810.05	\$67,004.67	\$106,930.38	\$20,044.10	\$86,886.28
806 HS AP	\$0.00	\$4,231.00	\$36,807.13	\$855.51	\$40,182.62	\$0.00	\$40,182.62
807 HS NATIONAL HONOR SOCIETY	\$0.00	\$3,005.00	\$19,775.00	\$5,536.82	\$17,243.18	\$1,848.56	\$15,394.62
808 HS STUDENT COUNCIL	\$0.00	\$43,184.62	\$78,420.45	\$39,218.14	\$82,386.93	\$10,868.12	\$71,518.81
809 HS SPEECH/DEBATE	\$0.00	\$1,642.00	\$4,345.40	\$1,248.00	\$4,739.40	\$0.00	\$4,739.40
810 OHS - TEACHER/STAFF APPRECIATION- FOOD ONLY	\$0.00	\$0.00	\$3,000.00	\$1,292.25	\$1,707.75	\$1,707.75	\$0.00
811 HS YOUTH ALIVE	\$0.00	\$0.00	\$805.69	\$0.00	\$805.69	\$0.00	\$805.69
812 HS YEARBOOK	\$0.00	\$6,187.80	\$12,024.96	\$2,086.31	\$16,126.45	\$2,215.00	\$13,911.45
814 HS ACADEMIC BOWL	\$0.00	\$0.00	\$409.86	\$218.91	\$190.95	\$0.00	\$190.95
815 HS EQUALITY CLUB	\$0.00	\$0.00	\$178.43	\$0.00	\$178.43	\$0.00	\$178.43
816 HS BAND	\$0.00	\$349,347.23	\$214,405.99	\$223,971.70	\$339,781.52	\$24,650.87	\$315,130.65
817 5TH GRADE HONOR CHOIR- DISTRICTWIDE	\$0.00	\$0.00	\$4,071.82	\$0.00	\$4,071.82	\$100.00	\$3,971.82
818 HS FFA	\$0.00	\$85,101.92	\$35,358.35	\$70,344.66	\$50,115.61	\$21,614.00	\$28,501.61
819 HS EAST - THE RAM RESERVE - SCHOOL STORE	\$0.00	\$2,729.00	\$297.51	\$2,332.81	\$693.70	\$0.00	\$693.70
820 HS STEM CLUB	\$0.00	\$0.00	\$79.25	\$0.00	\$79.25	\$0.00	\$79.25
821 HS COUNSELORS	\$0.00	\$0.00	\$2,892.15	\$34.25	\$2,857.90	\$0.00	\$2,857.90
822 HS ART	\$0.00	\$10,533.00	\$1,905.54	\$6,704.79	\$5,733.75	\$750.00	\$4,983.75
823 ASIAN AMERICAN HERITAGE CLUB	\$0.00	\$0.00	\$250.00	\$0.00	\$250.00	\$0.00	\$250.00
824 HS STAGECRAFT	\$0.00	\$0.00	\$405.18	\$0.00	\$405.18	\$0.00	\$405.18
825 HS LIBRARY	\$0.00	\$26,870.84	\$14,013.73	\$22,984.10	\$17,900.47	\$3,401.70	\$14,498.77
826 HS SENIOR CLASS	\$0.00	\$42,272.15	\$38,449.06	\$8,712.24	\$72,008.97	\$38,735.00	\$33,273.97
827 HS UNIFIED CLUB	\$0.00	\$1,132.00	\$866.54	\$1,539.68	\$458.86	\$0.00	\$458.86
828 HS JUNIOR CLASS	\$0.00	\$38,755.00	\$52,900.73	\$38,605.99	\$53,049.74	\$2,700.00	\$50,349.74
830 SPARK	\$0.00	\$922,737.82	\$186,776.27	\$610,720.39	\$498,793.70	\$31,412.37	\$467,381.33
831 E-SPORTS	\$0.00	\$4,620.65	\$1,232.74	\$3,250.69	\$2,602.70	\$1,428.94	\$1,173.76
834 HS FCA - FELLOWSHIP OF CHRISTIAN ATHLETES	\$0.00	\$115.00	\$115.00	\$0.00	\$230.00	\$0.00	\$230.00
835 HS HISTORY CLUB	\$0.00	\$1,586.00	\$430.62	\$626.83	\$1,389.79	\$350.00	\$1,039.79
836 HS WORLD TRAVEL CLUB	\$0.00	\$0.00	\$605.57	\$0.00	\$605.57	\$0.00	\$605.57
837 HS ROBOTICS	\$0.00	\$0.00	\$1,018.72	\$0.00	\$1,018.72	\$0.00	\$1,018.72
838 OHS LARP CLUB	\$0.00	\$0.00	\$139.99	\$71.64	\$68.35	\$0.00	\$68.35
839 HS DRAMA/PRODUCTIONS	\$0.00	\$26,553.70	\$14,821.99	\$9,209.47	\$32,166.22	\$5,500.00	\$26,666.22
840 8GC TEACHER/STAFF APPRECIATION- FOOD ONLY	\$0.00	\$0.00	\$1,500.00	\$314.15	\$1,185.85	\$0.00	\$1,185.85
841 EIGHTH GRADE ACTIVITY	\$0.00	\$378.10	\$19,303.72	\$0.00	\$19,681.82	\$4,112.00	\$15,569.82
842 EIGHTH GRADE STUDENT COUNCIL	\$0.00	\$4,999.00	\$6,631.07	\$2,965.95	\$8,664.12	\$3,000.00	\$5,664.12
844 EIGHTH GRADE FACS	\$0.00	\$1,095.00	\$3,386.66	\$511.51	\$3,970.15	\$0.00	\$3,970.15
845 EIGHTH GRADE YEARBOOK	\$0.00	\$1,132.50	\$3,503.73	\$119.83	\$4,516.40	\$3,876.00	\$640.40
848 EIGHTH GRADE ART	\$0.00	\$2,520.00	\$1,624.01	\$432.02	\$3,711.99	\$100.00	\$3,611.99
849 EIGHTH GRADE FOREIGN LANGUAGE	\$0.00	\$1,410.00	\$1,687.77	\$331.84	\$2,765.93	\$0.00	\$2,765.93
850 8GC ARCHERY CLUB	\$0.00	\$1,060.00	\$0.00	\$1,060.00	\$0.00	\$0.00	\$0.00
851 EIGHTH GRADE ROBOTICS	\$0.00	\$0.00	\$24.62	\$0.00	\$24.62	\$0.00	\$24.62
853 EIGHTH GRADE COMPUTER	\$0.00	\$210.00	\$441.42	\$0.00	\$651.42	\$611.00	\$40.42
855 EIGHTH GRADE ENGLISH	\$0.00	\$0.00	\$114.52	\$0.00	\$114.52	\$0.00	\$114.52
856 EIGHTH GRADE TEACHERS WELFARE	\$0.00	\$340.00	\$913.12	\$0.00	\$1,253.12	\$750.00	\$503.12
857 7TH GRADE STEM	\$0.00	\$1,310.00	\$92.81	\$1,199.18	\$203.63	\$173.51	\$30.12
858 EIGHTH GRADE FCCLA	\$0.00	\$8,874.50	\$8,075.87	\$2,179.71	\$14,770.66	\$1,097.14	\$13,673.52
859 EIGHTH GRADE STRENGTH & CONDITIONING / PE	\$0.00	\$310.00	\$924.98	\$891.57	\$343.41	\$42.99	\$300.42
860 EIGHTH GRADE STEM	\$0.00	\$240.00	\$591.09	\$0.00	\$831.09	\$0.00	\$831.09
861 SEVENTH GRADE ACTIVITY	\$0.00	(\$1.00)	\$24,418.94	\$2,426.70	\$21,991.24	\$0.00	\$21,991.24
862 SEVENTH GRADE YEARBOOK	\$0.00	\$484.21	\$5,212.49	\$3,149.16	\$2,547.54	\$0.00	\$2,547.54
863 SEVENTH FOREIGN LANGUAGE	\$0.00	\$1,100.00	\$522.08	\$1,087.83	\$534.25	\$0.00	\$534.25

# Owasso Public Schools

## Revenue/Expenditure Summary

Options: Fund: 60, Date Range: 7/1/2025 - 4/30/2026

	Begin Balance	Receipts	Adjusting Entries	Payments	Cash End Balance	Unpaid POs	End Balance
864 SEVENTH GRADE STUDENT COUNCIL	\$0.00	\$5,058.00	\$2,447.06	\$5,322.12	\$2,182.94	\$250.00	\$1,932.94
866 SEVENTH GRADE SCIENCE	\$0.00	\$0.00	\$137.11	\$0.00	\$137.11	\$0.00	\$137.11
868 SEVENTH GRADE PHYS ED	\$0.00	\$345.00	\$3,378.28	\$0.00	\$3,723.28	\$0.00	\$3,723.28
869 7GC FACS	\$0.00	\$5,447.00	\$207.71	\$3,978.04	\$1,676.67	\$400.00	\$1,276.67
870 7GC TEACHER/STAFF APPRECIATION- FOOD ONLY	\$0.00	\$0.00	\$1,500.00	\$671.35	\$828.65	\$650.00	\$178.65
872 SEVENTH GRADE NATL JR HON SOC	\$0.00	\$1,523.00	\$1,991.74	\$1,475.41	\$2,039.33	\$520.00	\$1,519.33
874 SEVENTH GRADE LIBRARY	\$0.00	\$6,700.20	\$2,958.82	\$5,564.08	\$4,094.94	\$410.00	\$3,684.94
875 BARNES ACTIVITY	\$0.00	\$6,754.83	\$32,993.92	\$14,026.75	\$25,722.00	\$4,122.26	\$21,599.74
876 BARNES ALL IN	\$0.00	\$300.00	\$750.90	\$750.90	\$300.00	\$0.00	\$300.00
877 BARNES LIBRARY	\$0.00	\$10,767.68	\$22,802.73	\$12,594.89	\$20,975.52	\$228.42	\$20,747.10
879 SEVENTH GRADE ART	\$0.00	\$3,515.00	\$1,516.61	\$3,025.91	\$2,005.70	\$0.00	\$2,005.70
880 BARNES TEACHER/STAFF APPRECIATION- FOOD ONLY	\$0.00	\$0.00	\$1,000.00	\$535.13	\$464.87	\$464.87	\$0.00
881 BARNES MUSIC	\$0.00	\$495.00	\$34.30	\$495.00	\$34.30	\$0.00	\$34.30
882 ATOR LIBRARY	\$0.00	\$21,642.47	\$4,001.01	\$11,459.21	\$14,184.27	\$1,422.44	\$12,761.83
883 ATOR ACTIVITY	\$0.00	\$1,090.96	\$13,045.16	\$2,089.90	\$12,046.22	\$65.71	\$11,980.51
884 ATOR PHYSICAL EDUCATION	\$0.00	\$0.00	\$1,594.70	\$0.00	\$1,594.70	\$0.00	\$1,594.70
887 MILLS ACTIVITY	\$0.00	\$7,440.81	\$14,500.37	\$8,351.35	\$13,589.83	\$1,762.58	\$11,827.25
888 STUDENT LEADERSHIP	\$0.00	\$0.00	\$1,457.64	\$0.00	\$1,457.64	\$60.00	\$1,397.64
889 MILLS TEACHER WELFARE	\$0.00	\$789.00	\$3,899.71	\$740.87	\$3,947.84	\$500.00	\$3,447.84
890 MILLS TEACHER/STAFF APPRECIATION- FOOD ONLY	\$0.00	\$0.00	\$1,000.00	\$998.22	\$1.78	\$0.00	\$1.78
891 MILLS LIBRARY	\$0.00	\$11,302.48	\$7,949.13	\$11,869.01	\$7,382.60	\$2,321.79	\$5,060.81
892 SMITH TEACHER/STAFF APPRECIATION- FOOD ONLY	\$0.00	\$0.00	\$1,000.00	\$669.94	\$330.06	\$197.00	\$133.06
893 SMITH ACTIVITY	\$0.00	\$4,994.50	\$27,143.58	\$5,561.02	\$26,577.06	\$821.61	\$25,755.45
894 SMITH LIBRARY	\$0.00	\$9,638.54	\$10,298.10	\$11,634.17	\$8,302.47	\$55.00	\$8,247.47
895 SMITH RUN CLUB	\$0.00	\$0.00	\$23.00	\$0.00	\$23.00	\$0.00	\$23.00
897 SMITH TEACHERS WELFARE	\$0.00	\$1,635.00	\$1,883.37	\$1,688.47	\$1,829.90	\$0.00	\$1,829.90
898 HODSON ACTIVITY	\$0.00	\$14,061.20	\$37,409.06	\$14,663.57	\$36,806.69	\$2,133.96	\$34,672.73
899 HODSON TEACHER WELFARE	\$0.00	\$900.00	\$294.02	\$1,106.29	\$87.73	\$85.52	\$2.21
900 HODSON TEACHER/STAFF APPRECIATION-FOOD ONLY	\$0.00	\$0.00	\$1,000.00	\$984.04	\$15.96	\$15.13	\$0.83
901 HODSON LIBRARY	\$0.00	\$23,111.71	\$11,437.61	\$16,707.97	\$17,841.35	\$6,286.73	\$11,554.62
902 HODSON PHYS ED	\$0.00	\$0.00	\$813.26	\$101.39	\$711.87	\$0.00	\$711.87
903 HODSON MUSIC	\$0.00	\$2,868.00	\$817.08	\$2,959.23	\$725.85	\$0.00	\$725.85
904 NORTHEAST TEACHER/STAFF APPRECIATION-FOOD ONLY	\$0.00	\$0.00	\$1,000.00	\$231.16	\$768.84	\$568.84	\$200.00
905 NORTHEAST ACTIVITY	\$0.00	\$5,435.70	\$35,668.85	\$4,486.49	\$36,618.06	\$5,135.00	\$31,483.06
906 NORTHEAST TEACHERS WELFARE	\$0.00	\$0.00	\$220.54	\$124.28	\$96.26	\$0.00	\$96.26
907 NORTHEAST LIBRARY	\$0.00	\$14,990.92	\$33,208.79	\$18,501.90	\$29,697.81	\$6,421.87	\$23,275.94
911 BAILEY ACTIVITY	\$0.00	\$5,219.79	\$18,903.96	\$4,088.09	\$20,035.66	\$1,053.44	\$18,982.22
912 BAILEY TEACHERS WELFARE	\$0.00	\$8,486.69	\$190.56	\$2,612.62	\$6,064.63	\$2,200.00	\$3,864.63
914 BAILEY LIBRARY	\$0.00	\$6,985.41	\$7,489.55	\$7,859.04	\$6,615.92	\$150.00	\$6,465.92
915 BAILEY TEACHER/STAFF APPRECIATION- FOOD ONLY	\$0.00	\$0.00	\$1,000.00	\$721.84	\$278.16	\$0.00	\$278.16
924 EIGHTH GRADE LIBRARY	\$0.00	\$3,497.06	\$3,088.76	\$2,855.29	\$3,730.53	\$0.00	\$3,730.53
926 EIGHTH GRADE NATL JR HONOR SOC	\$0.00	\$3,585.05	\$2,659.25	\$1,873.64	\$4,370.66	\$3,310.00	\$1,060.66
927 EIGHTH GRADE SCIENCE	\$0.00	\$0.00	\$24.07	\$0.00	\$24.07	\$0.00	\$24.07
929 SPECIAL ED PROGRAMS	\$0.00	\$387.52	\$213,953.11	\$5,672.56	\$208,668.07	\$881.12	\$207,786.95
930 ATOR TEACHER/STAFF APPRECIATION- FOOD ONLY	\$0.00	\$0.00	\$1,000.00	\$829.64	\$170.36	\$170.36	\$0.00
932 SPEC OLYMPICS - DIST WIDE	\$0.00	\$22,297.00	\$80,295.51	\$3,158.59	\$99,433.92	\$21,600.00	\$77,833.92
933 RAM ACADEMY	\$0.00	\$6,305.26	\$6,673.95	\$6,267.40	\$6,711.81	\$3,526.65	\$3,185.16
934 INDIAN EDUCATION ACTIVITY	\$0.00	\$9,387.50	\$9,615.83	\$9,250.95	\$9,752.38	\$1,045.00	\$8,707.38
936 GRANTS - (OEF ONLY)	\$0.00	\$78,733.00	\$0.00	\$74,268.90	\$4,464.10	\$1,729.41	\$2,734.69
937 GRANTS (EXCEPT OEF-SEE 936)	\$0.00	\$20,267.00	\$5,451.56	\$18,793.46	\$6,925.10	\$5,506.51	\$1,418.59

# Owasso Public Schools

## Revenue/Expenditure Summary

Options: Fund: 60, Date Range: 7/1/2025 - 4/30/2026

	Begin Balance	Receipts	Adjusting Entries	Payments	Cash End Balance	Unpaid POs	End Balance
938 STAFF APPRECIATION-DISTRICT SERVICES-FOOD ONLY	\$0.00	\$1,095.40	\$5,726.55	\$2,549.08	\$4,272.87	\$755.76	\$3,517.11
941 ATHLETICS	\$0.00	\$511,110.21	\$492,714.48	\$612,568.71	\$391,255.98	\$54,051.66	\$337,204.32
942 RAM PARTNERS	\$0.00	\$189,273.00	\$140,827.16	\$171,725.28	\$158,374.88	\$55,369.86	\$103,005.02
944 VIRTUAL/SUMMER SCHOOL	\$0.00	(\$25.00)	\$31,025.00	\$0.00	\$31,000.00	\$0.00	\$31,000.00
946 DISTRICT FINE ARTS	\$0.00	\$84,628.00	\$117,100.13	\$44,279.14	\$157,448.99	\$9,694.65	\$147,754.34
947 OPERATIONS WELFARE FUND	\$0.00	\$0.00	\$179.58	\$0.00	\$179.58	\$0.00	\$179.58
949 HEALTH SERVICES	\$0.00	\$0.00	\$106.29	\$0.00	\$106.29	\$0.00	\$106.29
951 RAM TEACHER WELFARE	\$0.00	\$0.00	\$4,327.98	\$284.84	\$4,043.14	\$425.00	\$3,618.14
953 HS FACS	\$0.00	\$8,987.30	\$6,806.67	\$8,974.40	\$6,819.57	\$3,290.30	\$3,529.27
957 HS VOCAL	\$0.00	\$138,046.70	\$49,060.12	\$106,869.49	\$80,237.33	\$41,558.00	\$38,679.33
960 STEM - 6GC	\$0.00	\$1,735.00	\$1,642.53	\$1,759.79	\$1,617.74	\$0.00	\$1,617.74
962 STUDENT HOLDING ACCOUNT	\$0.00	\$19,506.35	\$107,318.26	\$0.00	\$126,824.61	\$0.00	\$126,824.61
963 HS LIBERTY COMMITTEE	\$0.00	\$6,334.50	\$6,028.21	\$4,580.51	\$7,782.20	\$0.00	\$7,782.20
965 HS TEACHERS WELFARE	\$0.00	\$6,290.86	\$15,016.22	\$4,851.47	\$16,455.61	\$3,033.83	\$13,421.78
968 MORROW ACTIVITY	\$0.00	\$23,820.10	\$33,289.80	\$17,524.31	\$39,585.59	\$6,545.15	\$33,040.44
969 MORROW TEACHER/STAFF APPRECIATION-FOOD ONLY	\$0.00	\$0.00	\$1,000.00	\$468.18	\$531.82	\$281.82	\$250.00
970 RAM ACADEMY TEACHER/STAFF APPRECIATION-FOOD ONLY	\$0.00	\$0.00	\$300.00	\$229.84	\$70.16	\$0.00	\$70.16
971 HS FCCLA	\$0.00	\$6,452.00	\$4,912.89	\$6,727.23	\$4,637.66	\$285.94	\$4,351.72
972 MORROW TEACHER WELFARE	\$0.00	\$1,378.00	\$5,650.22	\$1,580.16	\$5,448.06	\$0.00	\$5,448.06
973 HS FOREIGN LANGUAGE CLUB	\$0.00	\$4,876.76	\$10,476.94	\$5,806.94	\$9,546.76	\$875.00	\$8,671.76
974 MORROW LIBRARY	\$0.00	\$15,226.75	\$12,485.68	\$19,829.24	\$7,883.19	\$300.00	\$7,583.19
975 SIXTH GRADE ACTIVITY	\$0.00	\$99.28	\$21,273.25	\$3,446.02	\$17,926.51	\$860.67	\$17,065.84
976 SIXTH GRADE PHYS ED	\$0.00	\$30.00	\$936.98	\$0.00	\$966.98	\$0.00	\$966.98
977 SIXTH GRADE STUDENT COUNCIL	\$0.00	\$0.00	\$5,343.45	\$457.42	\$4,886.03	\$900.00	\$3,986.03
978 SIXTH GRADE YEARBOOK	\$0.00	\$615.10	\$20,065.94	\$183.97	\$20,497.07	\$500.00	\$19,997.07
979 SIXTH GRADE COMPUTER	\$0.00	\$5.00	\$22.42	\$0.00	\$27.42	\$0.00	\$27.42
980 6GC TEACHER/STAFF APPRECIATION-FOOD ONLY	\$0.00	\$0.00	\$1,500.00	\$802.00	\$698.00	\$550.00	\$148.00
982 SIXTH GRADE SCIENCE	\$0.00	\$0.00	\$117.39	\$0.00	\$117.39	\$0.00	\$117.39
983 SIXTH GRADE ART	\$0.00	\$3,830.00	\$4,501.31	\$1,046.21	\$7,285.10	\$0.00	\$7,285.10
984 SIXTH GRADE TEACHERS WELFARE	\$0.00	\$0.00	\$1,875.54	\$678.30	\$1,197.24	\$800.00	\$397.24
988 SIXTH GRADE SOCIAL STUDIES	\$0.00	\$0.00	\$2,123.01	\$104.46	\$2,018.55	\$0.00	\$2,018.55
989 SIXTH GRADE LIBRARY	\$0.00	\$5,851.80	\$14,992.74	\$6,391.58	\$14,452.96	\$125.00	\$14,327.96
990 STONE CANYON TEACHER/STAFF APPRECIATION-FOOD ONLY	\$0.00	\$250.00	\$1,000.00	\$853.32	\$396.68	\$394.65	\$2.03
993 SIXTH GRADE E.S.C.	\$0.00	\$0.00	\$1,572.00	\$0.00	\$1,572.00	\$0.00	\$1,572.00
994 STONE CANYON ACTIVITY	\$0.00	\$18,359.70	\$20,333.71	\$17,334.81	\$21,358.60	\$3,658.80	\$17,699.80
995 STONE CANYON TEACHERS WELFARE	\$0.00	\$700.00	\$971.97	\$657.00	\$1,014.97	\$0.00	\$1,014.97
997 STONE CANYON LIBRARY	\$0.00	\$34,209.89	\$19,749.84	\$28,714.19	\$25,245.54	\$4,957.87	\$20,287.67
998 CHROMEBOOK INS/ACCESORIES	\$0.00	\$35,467.50	\$31,910.08	\$21,784.65	\$45,592.93	\$30,215.35	\$15,377.58
<b>Total</b>	<b>\$0.00</b>	<b>\$3,140,331.14</b>	<b>\$2,988,009.77</b>	<b>\$2,563,008.07</b>	<b>\$3,565,332.84</b>	<b>\$486,713.53</b>	<b>\$3,078,619.31</b>



## **2026-2027 Owasso Band Boosters Concession Contract With Owasso School District**

This contract is made by and between INDEPENDENT SCHOOL DISTRICT NUMBER ELEVEN TULSA COUNTY, OKLAHOMA, hereinafter called the "District", and Owasso Band Booster Club hereafter called the "Club."

### RECITALS:

1. District is the owner of the Athletic complex, specifically the Football Stadium and East Campus gym for purposes of this contract, (hereinafter called the "Complex") located on the property of Owasso Schools, Owasso, Oklahoma.
2. Club desires to obtain from the District the exclusive rights to operate food and beverage concession (hereinafter called the "Concessions") during all sporting events controlled by the Athletic Department (excluding Owasso home Soccer games) at the complex during the period August 1, 2026 through June 30, 2027.

Therefore the parties agree as follows:

1. Operations of Concessions, District hereby grants to Club the right to operate the Concessions at the Complex through the period specified above. Club agrees to operate the concessions at the complex during the period specified above in accordance with the terms of this agreement. Club further agrees to schedule a meeting with the district's Operations Department prior to the start of the new season in order that both parties can check the operation readiness of the concession facilities at the complex.
2. Compliance with Laws. In the operation of the concessions, Club shall comply with all applicable laws, rules, regulations, and ordinances, including but not limited to health, licensing, permits and safety rules and regulations of local and state laws and the sales tax requirements of the Oklahoma Tax Commission. Club shall provide the District copies of all current licenses and permits. After each event, Club shall be responsible for cleaning the concession food preparation areas and concession equipment.
3. Equipment. Club shall have the right to use any equipment owned by the District and presently installed in the concession areas. This agreement shall not obligate the District to furnish any additional concession equipment. District agrees to provide and maintain utilities for the operation on the concessions.

District shall not be required to provide any utility service in addition to that which presently exists. Club shall be responsible for any damage to District's equipment that occurs during periods of time when Club is operating the concessions.

Club shall have the right to install such additional concession equipment as it deems appropriate (upon prior consultation with the District Operations Department) and such equipment may be removed by Club at termination of this agreement, subject to the obligations of Club to repair any damage done to the complex by such removal. District shall have no responsibility for any loss, damage, vandalism or destruction of Club's equipment.

4. Term. The term of this agreement shall be August 1, 2026 through June 30, 2027
5. . District reserves the right to cancel this agreement at any time by providing thirty (30) days written notice to the Club in the event the Club fails to perform any obligation listed hereunder:
5. Miscellaneous:
  - a. Club desires the right to operate the concessions at scheduled Complex events (specifically related to football, basketball and wrestling) during the period of August 1, 2026, through June 30, 2027. While the Club concessions are in operation, no other food or beverages may be sold in the complex or its parking

lots. Food and drink may be served, but not sold, unless permissible by the Club.

b. The Owasso High School Athletic Department may provide catered food and beverages to its coaches and guests in the Complex.

c. The Owasso Athletic Department shall be paid ten (10) percent of the Club's concession profits (before labor costs and after the costs of goods) **not to exceed \$4,000 for football and \$1,000 for basketball to offset** Complex utility, maintenance, cleaning costs for the season.

**d. The Owasso Athletic Department shall be paid \$500 from the Club's concession profits per hosted football playoff game to offset Complex maintenance and cleaning costs for the event.**

e. This agreement shall be binding upon the parties hereto and their successors and assigns, except that Club shall not have the right to assign this agreement or to sublet the operation of the concession without prior written agreement of District.

f. Club shall be responsible for determining menu items and pricing of products to realize a fair and reasonable profit. Provided, however, no beer or alcoholic beverage shall be sold or dispensed by the Club. District contracts for food and/or beverage that include the complex will be honored by the Club.

g. Club agrees to allow the Chief Financial Officer of the District access to audit concession records.

INDEPENDENT SCHOOL DISTRICT NUMBER ELEVEN OF TULSA COUNTY,  
OKLAHOMA

By \_\_\_\_\_ Date \_\_\_\_\_  
President- "Owasso School District Board"

By *Janice D. Williams* Date *4.2.26*  
President, "Club"

## **2026-2027 Owasso Baseball Boosters Concession Contract With Owasso School District**

This contract is made by and between INDEPENDENT SCHOOL DISTRICT NUMBER ELEVEN TULSA COUNTY, OKLAHOMA, hereinafter called the "District" and Owasso Baseball Booster Club hereafter called the "Club."

### RECITALS:

1. District is the owner of the Baseball complex (hereinafter called the "complex") located on the property of Owasso Schools, Owasso, Oklahoma.
2. Club desires to obtain from the District the exclusive rights to operate food and beverage concession (hereinafter called the "concessions") at the complex during the period August 1, 2026 through June 30, 2027.

Therefore the parties agree as follows:

1. Operations of Concessions, District hereby grants to Club the exclusive right to operate the Concessions at the complex through the period specified above. Club agrees to operate the concessions at the complex during the period specified above in accordance with the terms of this agreement. Club further agrees to schedule a meeting with the district's Operations Department prior to the start of the new season in order that both parties can check the operation readiness of the concession facilities at the complex.
2. Compliance with Laws. In the operation of the concessions, Club shall comply with all applicable laws, rules, regulations, and ordinances, including but not limited to health, licensing, permits and safety rules and regulations of local and state laws and the sales tax requirements of the Oklahoma Tax Commission. Club shall provide the District copies of all current licenses and permits. After each event, Club shall be responsible for cleaning the concession food preparation areas and concession equipment.
3. Equipment. Club shall have the right to use any equipment owned by the District and presently installed in the concession areas. This agreement shall not obligate the District to furnish any additional concession equipment. District agrees to provide and maintain utilities for the operation on the concessions.

District shall not be required to provide any utility service in addition to that which presently exists. Club shall be responsible for any damage to District's equipment that occurs during periods of time when Club is operating the concessions.

Club shall have the right to install such additional concession equipment as it deems appropriate (upon prior consultation with the District Operations Department) and such equipment may be removed by Club at termination of this agreement, subject to the obligations of Club to repair any damage done to the complex by such removal. District shall have no responsibility for any loss, damage, vandalism or destruction of Club's equipment.

4. Term. The term of this agreement shall be August 1, 2026 through June 30, 2027. District reserves the right to cancel this agreement at any time by providing thirty (30) days written notice to the Club in the event the Club fails to perform any obligation listed hereunder:

5. Miscellaneous:

a. Club desires the right to operate the concessions at scheduled Complex events during the period of August 1, 2026, through June 30, 2027. While the Club concessions are in operation, no other food or beverages may be sold in the complex or its parking lots. Food and drink served, but not sold, is permissible.

b. The Owasso District may operate a hospitality room for its members prior to and during the contest of Owasso High School athletic events.

c. The Owasso High School Athletic Department may provide catered food and beverages to its coaches and guests in the complex.

**d. The Owasso Athletic Department shall be paid ten (10) percent of the Club's concession profits (before labor costs and after the costs of goods) not to exceed \$200 to offset Complex utility, maintenance, cleaning costs for the season.**

e. This agreement shall be binding upon the parties hereto and their successors and assigns, except that Club shall not have the right to assign this agreement or to sublet the operation of the concession without prior written agreement of District.

f. Club shall be responsible for determining menu items and pricing of products to realize a fair and reasonable profit. Provided, however, no beer or alcoholic beverage shall be sold or dispensed by the Club. District contracts for food and/or beverage that include the complex will be honored by the Club.

g. Club agrees to allow the Chief Financial Officer of the District access to audit concession records.

INDEPENDENT SCHOOL DISTRICT NUMBER ELEVEN OF TULSA COUNTY,  
OKLAHOMA

By \_\_\_\_\_  
President- "Owasso School District Board"

Date \_\_\_\_\_

By   
Treasurer- "Club"

Date 4-28-26

## **2026-2027 Owasso Basketball Boosters Concession Contract With Owasso School District**

This contract is made by and between INDEPENDENT SCHOOL DISTRICT NUMBER ELEVEN TULSA COUNTY, OKLAHOMA, hereinafter called the "District" and Owasso Basketball Booster Club hereafter called the "Club."

### RECITALS:

1. District is the owner of the 8<sup>th</sup> Grade Center Gym complex (hereinafter called the "complex") located on the property of Owasso Schools, Owasso, Oklahoma.
2. Club desires to obtain from the District the exclusive rights to operate food and beverage concession (hereinafter called the "concessions") at the complex during the period August 1, 2026 through June 30, 2027.

Therefore the parties agree as follows:

1. Operations of Concessions, District hereby grants to Club the exclusive right to operate the Concessions at the complex through the period specified above. Club agrees to operate the concessions at the complex during the period specified above in accordance with the terms of this agreement. Club further agrees to schedule a meeting with the district's Operations Department prior to the start of the new season in order that both parties can check the operation readiness of the concession facilities at the complex.
2. Compliance with Laws. In the operation of the concessions, Club shall comply with all applicable laws, rules, regulations, and ordinances, including but not limited to health, licensing, permits and safety rules and regulations of local and state laws and the sales tax requirements of the Oklahoma Tax Commission. Club shall provide the District copies of all current licenses and permits. After each event, Club shall be responsible for cleaning the concession food preparation areas and concession equipment.
3. Equipment. Club shall have the right to use any equipment owned by the District and presently installed in the concession areas. This agreement shall not obligate the District to furnish any additional concession equipment. District agrees to provide and maintain utilities for the operation on the concessions.

District shall not be required to provide any utility service in addition to that which presently exists. Club shall be responsible for any damage to District's equipment that occurs during periods of time when Club is operating the concessions.

Club shall have the right to install such additional concession equipment as it deems appropriate (upon prior consultation with the District Operations Department) and such equipment may be removed by Club at termination of this agreement, subject to the obligations of Club to repair any damage done to the complex by such removal. District shall have no responsibility for any loss, damage, vandalism or destruction of Club's equipment.

4. Term. The term of this agreement shall be August 1, 2026 through June 30, 2027. District reserves the right to cancel this agreement at any time by providing thirty (30) days written notice to the Club in the event the Club fails to perform any obligation listed hereunder:

5. Miscellaneous:

a. Club desires the right to operate the concessions at scheduled Complex events during the period of August 1, 2026, through June 30, 2027. While the Club concessions are in operation, no other food or beverages may be sold in the complex or its parking lots. Food and drink served, but not sold, are permissible.

b. The Owasso District may operate a hospitality room for its members prior to and during the contest of Owasso High School athletic events.

c. The Owasso High School Athletic Department may provide catered food and beverages to its coaches and guests in the complex.

**d. The Owasso Athletic Department shall be paid ten (10) percent of the Club's concession profits (before labor costs and after the costs of goods) not to exceed \$200 to offset Complex utility, maintenance, cleaning costs for the season.**

e. This agreement shall be binding upon the parties hereto and their successors and assigns, except that Club shall not have the right to assign this agreement or to sublet the operation of the concession without prior written agreement of District.

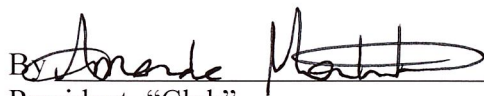
f. Club shall be responsible for determining menu items and pricing of products to realize a fair and reasonable profit. Provided, however, no beer or alcoholic beverage shall be sold or dispensed by the Club. District contracts for food and/or beverage that include the complex will be honored by the Club.

g. Club agrees to allow the Chief Financial Officer of the District access to audit concession records.

INDEPENDENT SCHOOL DISTRICT NUMBER ELEVEN OF TULSA COUNTY,  
OKLAHOMA

By \_\_\_\_\_  
President- "Owasso School District Board"

Date \_\_\_\_\_

By  \_\_\_\_\_  
President- "Club"

Date 4-27-26

## **2026-2027 Owasso Soccer Boosters Concession Contract With Owasso School District**

This contract is made by and between INDEPENDENT SCHOOL DISTRICT NUMBER ELEVEN TULSA COUNTY, OKLAHOMA, hereinafter called the "District" and Owasso Soccer Booster Club hereafter called the "Club."

### RECITALS:

1. District is the owner of the Stadium complex (hereinafter called the "complex") located on the property of Owasso Schools, Owasso, Oklahoma.
2. Club desires to obtain from the District the exclusive rights to operate food and beverage concession (hereinafter called the "concessions") at the complex during the period August 1, 2026 through June 30, 2027.

Therefore the parties agree as follows:

1. Operations of Concessions, District hereby grants to Club the exclusive right to operate the Concessions at the complex through the period specified above. Club agrees to operate the concessions at the complex during the period specified above in accordance with the terms of this agreement. Club further agrees to schedule a meeting with the district's Operations Department prior to the start of the new season in order that both parties can check the operation readiness of the concession facilities at the complex.
2. Compliance with Laws. In the operation of the concessions, Club shall comply with all applicable laws, rules, regulations, and ordinances, including but not limited to health, licensing, permits and safety rules and regulations of local and state laws and the sales tax requirements of the Oklahoma Tax Commission. Club shall provide the District copies of all current licenses and permits. After each event, Club shall be responsible for cleaning the concession food preparation areas and concession equipment.
3. Equipment. Club shall have the right to use any equipment owned by the District and presently installed in the concession areas. This agreement shall not obligate the District to furnish any additional concession equipment. District agrees to provide and maintain utilities for the operation on the concessions.

District shall not be required to provide any utility service in addition to that which presently exists. Club shall be responsible for any damage to District's equipment that occurs during periods of time when Club is operating the concessions.

Club shall have the right to install such additional concession equipment as it deems appropriate (upon prior consultation with the District Operations Department) and such equipment may be removed by Club at termination of this agreement, subject to the obligations of Club to repair any damage done to the complex by such removal. District shall have no responsibility for any loss, damage, vandalism or destruction of Club's equipment.

4. Term. The term of this agreement shall be August 1, 2026 through June 30, 2027. District reserves the right to cancel this agreement at any time by providing thirty (30) days written notice to the Club in the event the Club fails to perform any obligation listed hereunder:
5. Miscellaneous:
- a. Club desires the right to operate the concessions at scheduled Complex events during the period of August 1, 2026, through June 30, 2027. While the Club concessions are in operation, no other food or beverages may be sold in the complex or its parking lots. Food and drink served, but not sold, is permissible.
  - b. The Owasso District may operate a hospitality room for its members prior to and during the contest of Owasso High School athletic events.
  - c. The Owasso High School Athletic Department may provide catered food and beverages to its coaches and guests in the complex.
  - d. **The Owasso Athletic Department shall be paid ten (10) percent of the Club's concession profits (before labor costs and after the costs of goods) not to exceed \$200 to offset Complex utility, maintenance, cleaning costs for the season.**
  - e. This agreement shall be binding upon the parties hereto and their successors and assigns, except that Club shall not have the right to assign this agreement or to sublet the operation of the concession without prior written agreement of District.
  - f. Club shall be responsible for determining menu items and pricing of products to realize a fair and reasonable profit. Provided, however, no beer or alcoholic beverage shall be sold or dispensed by the Club. District contracts for food and/or beverage that include the complex will be honored by the Club.
  - g. Club agrees to allow the Chief Financial Officer of the District access to audit concession records.

INDEPENDENT SCHOOL DISTRICT NUMBER ELEVEN OF TULSA COUNTY,  
OKLAHOMA

By \_\_\_\_\_ Date \_\_\_\_\_  
President- "Owasso School District Board"

By Scott Reeves Date 3/31/2026  
President- Scott Reeves

## **2026-2027 Owasso Softball Boosters Concession Contract With Owasso School District**

This contract is made by and between INDEPENDENT SCHOOL DISTRICT NUMBER ELEVEN TULSA COUNTY, OKLAHOMA, hereinafter called the "District" and Owasso Softball Booster Club hereafter called the "Club."

### RECITALS:

1. District is the owner of the Softball complex (hereinafter called the "complex") located on the property of Owasso Schools, Owasso, Oklahoma.
2. Club desires to obtain from the District the exclusive rights to operate food and beverage concession (hereinafter called the "concessions") at the complex during the period August 1, 2026 through June 30, 2027.

Therefore the parties agree as follows:

1. Operations of Concessions, District hereby grants to Club the exclusive right to operate the Concessions at the complex through the period specified above. Club agrees to operate the concessions at the complex during the period specified above in accordance with the terms of this agreement. Club further agrees to schedule a meeting with the district's Operations Department prior to the start of the new season in order that both parties can check the operation readiness of the concession facilities at the complex.
2. Compliance with Laws. In the operation of the concessions, Club shall comply with all applicable laws, rules, regulations, and ordinances, including but not limited to health, licensing, permits and safety rules and regulations of local and state laws and the sales tax requirements of the Oklahoma Tax Commission. Club shall provide the District copies of all current licenses and permits. After each event, Club shall be responsible for cleaning the concession food preparation areas and concession equipment.
3. Equipment. Club shall have the right to use any equipment owned by the District and presently installed in the concession areas. This agreement shall not obligate the District to furnish any additional concession equipment. District agrees to provide and maintain utilities for the operation on the concessions.

District shall not be required to provide any utility service in addition to that which presently exists. Club shall be responsible for any damage to District's equipment that occurs during periods of time when Club is operating the concessions.

Club shall have the right to install such additional concession equipment as it deems appropriate (upon prior consultation with the District Operations Department) and such equipment may be removed by Club at termination of this agreement, subject to the obligations of Club to repair any damage done to the complex by such removal. District shall have no responsibility for any loss, damage, vandalism or destruction of Club's equipment.

4. Term. The term of this agreement shall be August 1, 2026 through June 30, 2027. District reserves the right to cancel this agreement at any time by providing thirty (30) days written notice to the Club in the event the Club fails to perform any obligation listed hereunder:

5. Miscellaneous:

a. Club desires the right to operate the concessions at scheduled Complex events during the period of August 1, 2026, through June 30, 2027. While the Club concessions are in operation, no other food or beverages may be sold in the complex or its parking lots. Food and drink served, but not sold, is permissible.

b. The Owasso District may operate a hospitality room for its members prior to and during the contest of Owasso High School athletic events.

c. The Owasso High School Athletic Department may provide catered food and beverages to its coaches and guests in the complex.

**d. The Owasso Athletic Department shall be paid ten (10) percent of the Club's concession profits (before labor costs and after the costs of goods) not to exceed \$200 to offset Complex utility, maintenance, cleaning costs for the season.**

e. This agreement shall be binding upon the parties hereto and their successors and assigns, except that Club shall not have the right to assign this agreement or to sublet the operation of the concession without prior written agreement of District.

f. Club shall be responsible for determining menu items and pricing of products to realize a fair and reasonable profit. Provided, however, no beer or alcoholic beverage shall be sold or dispensed by the Club. District contracts for food and/or beverage that include the complex will be honored by the Club.

g. Club agrees to allow the Chief Financial Officer of the District access to audit concession records.

INDEPENDENT SCHOOL DISTRICT NUMBER ELEVEN OF TULSA COUNTY,  
OKLAHOMA

By \_\_\_\_\_  
President- "Owasso School District Board"

Date \_\_\_\_\_

By Nathan G. Hamilton  
President- "Club"

Date 04-26-26

## **2026-2027 Owasso Volleyball Boosters Concession Contract With Owasso School District**

This contract is made by and between INDEPENDENT SCHOOL DISTRICT NUMBER ELEVEN TULSA COUNTY, OKLAHOMA, hereinafter called the "District" and Owasso Volleyball Booster Club hereafter called the "Club."

### **RECITALS:**

1. District is the owner of the Gym complex (hereinafter called the "complex") located on the property of Owasso Schools, Owasso, Oklahoma.
2. Club desires to obtain from the District the exclusive rights to operate food and beverage concession (hereinafter called the "concessions") at the complex during the period August 1, 2026 through June 30, 2027.

Therefore the parties agree as follows:

1. Operations of Concessions, District hereby grants to Club the exclusive right to operate the Concessions at the complex through the period specified above. Club agrees to operate the concessions at the complex during the period specified above in accordance with the terms of this agreement. Club further agrees to schedule a meeting with the district's Operations Department prior to the start of the new season in order that both parties can check the operation readiness of the concession facilities at the complex.
2. Compliance with Laws. In the operation of the concessions, Club shall comply with all applicable laws, rules, regulations, and ordinances, including but not limited to health, licensing, permits and safety rules and regulations of local and state laws and the sales tax requirements of the Oklahoma Tax Commission. Club shall provide the District copies of all current licenses and permits. After each event, Club shall be responsible for cleaning the concession food preparation areas and concession equipment.
3. Equipment. Club shall have the right to use any equipment owned by the District and presently installed in the concession areas. This agreement shall not obligate the District to furnish any additional concession equipment. District agrees to provide and maintain utilities for the operation on the concessions.

District shall not be required to provide any utility service in addition to that which presently exists. Club shall be responsible for any damage to District's equipment that occurs during periods of time when Club is operating the concessions.

Club shall have the right to install such additional concession equipment as it deems appropriate (upon prior consultation with the District Operations Department) and such equipment may be removed by Club at termination of this agreement, subject to the obligations of Club to repair any damage done to the complex by such removal. District shall have no responsibility for any loss, damage, vandalism or destruction of Club's equipment.

4. Term. The term of this agreement shall be August 1, 2026 through June 30, 2027. District reserves the right to cancel this agreement at any time by providing thirty (30) days written notice to the Club in the event the Club fails to perform any obligation listed hereunder:

5. Miscellaneous:

a. Club desires the right to operate the concessions at scheduled Complex events during the period of August 1, 2026, through June 30, 2027. While the Club concessions are in operation, no other food or beverages may be sold in the complex or its parking lots. Food and drink served, but not sold, are permissible.

b. The Owasso District may operate a hospitality room for its members prior to and during the contest of Owasso High School athletic events.

c. The Owasso High School Athletic Department may provide catered food and beverages to its coaches and guests in the complex.

**d. The Owasso Athletic Department shall be paid ten (10) percent of the Club's concession profits (before labor costs and after the costs of goods) not to exceed \$200 to offset Complex utility, maintenance, cleaning costs for the season.**

e. This agreement shall be binding upon the parties hereto and their successors and assigns, except that Club shall not have the right to assign this agreement or to sublet the operation of the concession without prior written agreement of District.

f. Club shall be responsible for determining menu items and pricing of products to realize a fair and reasonable profit. Provided, however, no beer or alcoholic beverage shall be sold or dispensed by the Club. District contracts for food and/or beverage that include the complex will be honored by the Club.

g. Club agrees to allow the Chief Financial Officer of the District access to audit concession records.

INDEPENDENT SCHOOL DISTRICT NUMBER ELEVEN OF TULSA COUNTY,  
OKLAHOMA

By \_\_\_\_\_  
President- "Owasso School District Board"

Date \_\_\_\_\_

By Ashley Mashburn  
President- "Club"

Date 4/24/26

Ashley Mashburn

## **2026-2027 Owasso Wrestling Boosters Concession Contract With Owasso School District**

This contract is made by and between INDEPENDENT SCHOOL DISTRICT NUMBER ELEVEN TULSA COUNTY, OKLAHOMA, hereinafter called the "District", and Owasso Wrestling Booster Club hereafter called the "Club."

### RECITALS:

1. District is the owner of the Gym complex (hereinafter called the "complex") located on the property of Owasso Schools, Owasso, Oklahoma.
2. Club desires to obtain from the District the exclusive rights to operate food and beverage concession (hereinafter called the "concessions") at the complex during the period August 1, 2026 through June 30, 2027.

Therefore the parties agree as follows:

1. Operations of Concessions, District hereby grants to Club the exclusive right to operate the Concessions at the complex through the period specified above. Club agrees to operate the concessions at the complex during the period specified above in accordance with the terms of this agreement. Club further agrees to schedule a meeting with the district's Operations Department prior to the start of the new season in order that both parties can check the operation readiness of the concession facilities at the complex.
2. Compliance with Laws. In the operation of the concessions, Club shall comply with all applicable laws, rules, regulations, and ordinances, including but not limited to health, licensing, permits and safety rules and regulations of local and state laws and the sales tax requirements of the Oklahoma Tax Commission. Club shall provide the District copies of all current licenses and permits. After each event, Club shall be responsible for cleaning the concession food preparation areas and concession equipment.
3. Equipment. Club shall have the right to use any equipment owned by the District and presently installed in the concession areas. This agreement shall not obligate the District to furnish any additional concession equipment. District agrees to provide and maintain utilities for the operation on the concessions.

District shall not be required to provide any utility service in addition to that which presently exists. Club shall be responsible for any damage to District's equipment that occurs during periods of time when Club is operating the concessions.

Club shall have the right to install such additional concession equipment as it deems appropriate (upon prior consultation with the District Operations Department) and such equipment may be removed by Club at termination of this agreement, subject to the obligations of Club to repair any damage done to the complex by such removal. District shall have no responsibility for any loss, damage, vandalism or destruction of Club's equipment.

4. Term. The term of this agreement shall be August 1, 2026 through June 30, 2027. District reserves the right to cancel this agreement at any time by providing thirty (30) days written notice to the Club in the event the Club fails to perform any obligation listed hereunder:

5. Miscellaneous:

a. Club desires the right to operate the concessions at scheduled Complex events during the period of August 1, 2026, through June 30, 2027. While the Club concessions are in operation, no other food or beverages may be sold in the complex or its parking lots. Food and drink served, but not sold, is permissible.

b. The Owasso District may operate a hospitality room for its members prior to and during the contest of Owasso High School athletic events.

c. The Owasso High School Athletic Department may provide catered food and beverages to its coaches and guests in the complex.

**d. The Owasso Athletic Department shall be paid ten (10) percent of the Club's concession profits (before labor costs and after the costs of goods) not to exceed \$200 to offset Complex utility, maintenance, cleaning costs for the season.**

e. This agreement shall be binding upon the parties hereto and their successors and assigns, except that Club shall not have the right to assign this agreement or to sublet the operation of the concession without prior written agreement of District.

f. Club shall be responsible for determining menu items and pricing of products to realize a fair and reasonable profit. Provided, however, no beer or alcoholic beverage shall be sold or dispensed by the Club. District contracts for food and/or beverage that include the complex will be honored by the Club.

g. Club agrees to allow the Chief Financial Officer of the District access to audit concession records.

INDEPENDENT SCHOOL DISTRICT NUMBER ELEVEN OF TULSA COUNTY,  
OKLAHOMA

By \_\_\_\_\_  
President- "Owasso School District Board"

Date \_\_\_\_\_

By Heather Collier  
President- "Club"

Date 4-22-26

## **2026-2027 Owasso Track/CC Boosters Concession Contract With Owasso School District**

This contract is made by and between INDEPENDENT SCHOOL DISTRICT NUMBER ELEVEN TULSA COUNTY, OKLAHOMA, hereinafter called the "District" and Owasso Track/CC Booster Club hereafter called the "Club."

### RECITALS:

1. District is the owner of the Track/CC complex (hereinafter called the "complex") located on the property of Owasso Schools, Owasso, Oklahoma.
2. Club desires to obtain from the District the exclusive rights to operate food and beverage concession (hereinafter called the "concessions") at the complex during the period August 1, 2026 through June 30, 2027.

Therefore the parties agree as follows:

1. Operations of Concessions, District hereby grants to Club the exclusive right to operate the Concessions at the complex through the period specified above. Club agrees to operate the concessions at the complex during the period specified above in accordance with the terms of this agreement. Club further agrees to schedule a meeting with the district's Operations Department prior to the start of the new season in order that both parties can check the operation readiness of the concession facilities at the complex.
2. Compliance with Laws. In the operation of the concessions, Club shall comply with all applicable laws, rules, regulations, and ordinances, including but not limited to health, licensing, permits and safety rules and regulations of local and state laws and the sales tax requirements of the Oklahoma Tax Commission. Club shall provide the District copies of all current licenses and permits. After each event, Club shall be responsible for cleaning the concession food preparation areas and concession equipment.
3. Equipment. Club shall have the right to use any equipment owned by the District and presently installed in the concession areas. This agreement shall not obligate the District to furnish any additional concession equipment. District agrees to provide and maintain utilities for the operation on the concessions.

District shall not be required to provide any utility service in addition to that which presently exists. Club shall be responsible for any damage to District's equipment that occurs during periods of time when Club is operating the concessions.

Club shall have the right to install such additional concession equipment as it deems appropriate (upon prior consultation with the District Operations Department) and such equipment may be removed by Club at termination of this agreement, subject to the obligations of Club to repair any damage done to the complex by such removal. District shall have no responsibility for any loss, damage, vandalism or destruction of Club's equipment.

4. Term. The term of this agreement shall be August 1, 2026 through June 30, 2027. District reserves the right to cancel this agreement at any time by providing thirty (30) days written notice to the Club in the event the Club fails to perform any obligation listed hereunder:
5. Miscellaneous:
- a. Club desires the right to operate the concessions at scheduled Complex events during the period of August 1, 2026, through June 30, 2027. While the Club concessions are in operation, no other food or beverages may be sold in the complex or its parking lots. Food and drink served, but not sold, is permissible.
  - b. The Owasso District may operate a hospitality room for its members prior to and during the contest of Owasso High School athletic events.
  - c. The Owasso High School Athletic Department may provide catered food and beverages to its coaches and guests in the complex.
  - d. **The Owasso Athletic Department shall be paid ten (10) percent of the Club's concession profits (before labor costs and after the costs of goods) not to exceed \$200 to offset Complex utility, maintenance, cleaning costs for the season.**
  - e. This agreement shall be binding upon the parties hereto and their successors and assigns, except that Club shall not have the right to assign this agreement or to sublet the operation of the concession without prior written agreement of District.
  - f. Club shall be responsible for determining menu items and pricing of products to realize a fair and reasonable profit. Provided, however, no beer or alcoholic beverage shall be sold or dispensed by the Club. District contracts for food and/or beverage that include the complex will be honored by the Club.
  - g. Club agrees to allow the Chief Financial Officer of the District access to audit concession records.

INDEPENDENT SCHOOL DISTRICT NUMBER ELEVEN OF TULSA COUNTY,  
OKLAHOMA

By \_\_\_\_\_  
President- "Owasso School District Board"

Date \_\_\_\_\_

By Jellym Bender  
President- "Club"

Date 4/15/2026



**CCOSA’s District Level Services (DLS) Program**  
**(Agreement 2026-2027)**

This letter sets out the Agreement between the Cooperative Council for Oklahoma School Administration (CCOSA) and **Owasso Public** School District No. **11** of **72** County, Oklahoma (District) concerning the District’s participation in **CCOSA’s District Level Services Program** (Program) for the fiscal year ending June 30, 2027.

For participating Oklahoma cooperatives, interlocals, and technology centers, the cost of participation will be determined based upon the total 2025-26 ADM for your district.

**P.O. CALCULATION GRID**

County Name: **Tulsa** County Number: **11**

District Name: **Owasso Public Schools** District Number: **72**

**P.O. CALCULATION GRID**

<b><u>ADM</u></b>	<b><u>COST</u></b>
25,000 plus	\$ 4,000
10,000 to 24,999	\$ 3,000
5,000 to 9,999	\$ 2,500
1,500 to 4,999	\$ 2,000
500 to 1,499	\$ 1,800
499 or less	\$ 1,500

<b>ADM (2025-26)</b>	<b>TOTAL COST</b>
<b>9,720</b>	<b>\$2,500.00</b>

Purchase Order Number: \_\_\_\_\_

Purchase Order Amount: **\$2,500.00**

\*\*Please attach a copy of the purchase order when submitting completed forms\*\*



**Superintendent Certification of Participation**

I certify that on the 11<sup>th</sup> day of May 2026 the Board of Education of Owasso Public Schools voted to allow our school district to participate in the CCOSA District Level Services Program. The Owasso Board of Education has encumbered \$ 2,500.00 for the purpose of participating in the CCOSA District Level Services Program. The Board of Education acknowledges that participation in the Program will result in the provision of advisory services to designated administrators with Owasso Public Schools.

\_\_\_\_\_  
Signature of Superintendent

\_\_\_\_\_  
Date

The District understands that CCOSA’s District Level Services Program emphasizes assistance in areas that help to create high-quality schools based on the research: Leadership and Governance; Culture and Climate; Mentoring and Coaching; Teaching and Learning; Assessing and Using Data for Learning; and Financial Resources.

If consultation and/or professional learning is in the school district, the school district would agree to pay travel expenses that would not be a part of this agreement.

The District understands that CCOSA and/or its partners will be unable to provide assistance in some areas and with some issues. The District understands that, in those situations, CCOSA and/or its partners may recommend that the District seek advice, assistance, and services beyond those offered by this Program, which may cause the District to incur expenses that are not covered by this Program. **This Program is ADVISORY ONLY and CCOSA and/or its partners do not warrant or guarantee any specific outcome related to the advisory services provided. CCOSA reserves the right to refuse participation to school districts and to remove school districts from participation in the Program.**

The term of this Agreement begins on the date it is approved by the District’s Board of Education and ends on June 30, 2027. Either the District or CCOSA may terminate this Agreement upon notice in writing to the other party. However, a delay in contract approval could result in your district missing valued services and workshops!



## CCOSA’s District Level Services (DLS) Program

### Designated Administrator Contact Form 2026-2027

While all of your district leaders have full access by phone, email, or in person, we need you to designate district administrators who serve as your main contacts to share information from CCOSA and its partners. **These designated administrators will need to commit to forwarding Professional Learning opportunities to your other district and/or school team members to ensure that all of your leaders get maximum benefit from the program.** Districts with an ADM of 10,000 and above may designate three district administrators. The District may include additional school personnel at no additional cost in conference calls, on-site visits, and training sessions.

#### **Designated Administrators**

(based upon each district’s size in ADM for the 2025-26 school year)

<u>ADM</u>	<u># of eligible administrators</u>
10,000 +	3
1 to 9,999	2

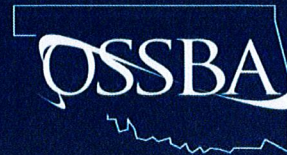
<u>ADMINISTRATOR</u>	<u>PHONE NUMBER</u>	<u>EMAIL ADDRESS</u>
Dr. Margaret Coates	918-272-5367	margaret.coates@owassops.org
Mr. Kerwin Koerner	918-272-5367	kerwin.koerner@owassops.org
*		

\*only if ADM exceeds 10,000

Please scan and send a copy of the completed forms to Jen Knight ([jennifer@ccosa.org](mailto:jennifer@ccosa.org)) or fax to 405.524.1196 (ATTN: Jen Knight). Keep one copy for your records.

# MEMBERSHIP RENEWAL

OKLAHOMA STATE SCHOOL BOARDS ASSOCIATION



District Name	Owasso Public Schools
Superintendent Name	Dr. Margaret Coates
Superintendent Email	margaret.coates@owassops.org
Minutes Clerk Name	Renae Klein
Minutes Clerk Email	renae.klein@owassops.org

<input type="checkbox"/>	Superintendent is new for the 26-27 school year
<input type="checkbox"/>	Superintendent is a first-year superintendent

My district wishes to subscribe/renew the following memberships and services:

<input checked="" type="checkbox"/>	OSSBA Membership	<input type="checkbox"/>	Online Policy Hosting
<input checked="" type="checkbox"/>	Policy Services	<input type="checkbox"/>	Superintendent Evaluation (online tool)
<input type="checkbox"/>	Employment Services	<input type="checkbox"/>	Connections (monthly communications newsletter)
<input checked="" type="checkbox"/>	Assemble Meetings		

My district is interested in the following services and would like to be contacted with more information:

<input type="checkbox"/>	Strategic Planning	<input type="checkbox"/>	Online Policy Hosting	<input type="checkbox"/>	Leadership training for administrative teams
<input type="checkbox"/>	Whole-board training in my district	<input type="checkbox"/>	Community Engagement	<input type="checkbox"/>	Facility Planning Services
<input type="checkbox"/>	Policy Services	<input type="checkbox"/>	Superintendent Search	<input type="checkbox"/>	Technology Services
<input type="checkbox"/>	Assemble Meetings	<input type="checkbox"/>	Superintendent Evaluation (online tool)	<input type="checkbox"/>	Connections (monthly communications newsletter)
<input type="checkbox"/>	Employee Benefits				

\_\_\_\_\_  
Board Clerk

Date of Board Approval \_\_\_\_\_ PO# \_\_\_\_\_



**Oklahoma State School Boards Assn.**  
 2801 N. Lincoln Blvd. Suite 125  
 Oklahoma City, OK 73105  
 405.528.3571 or 888.528.3571  
 Fax: 405.609.3091  
 EIN: 73-6636480

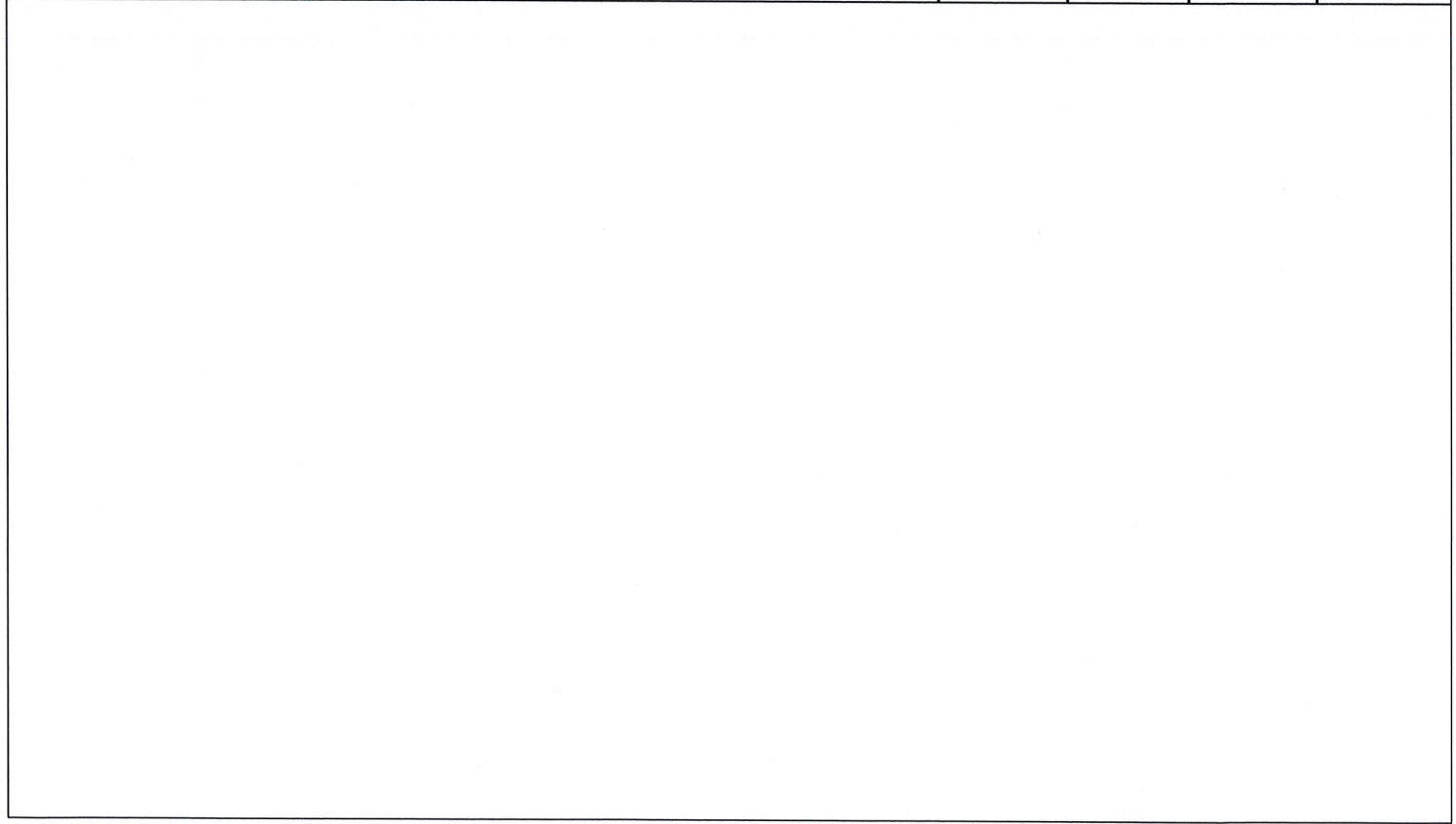
<b>Invoice</b>	47733
<b>Date</b>	7/15/2026
<b>Amount Due</b>	\$5,796.00
<b>Customer #</b>	6767

**Customer:**

Owasso Public Schools  
 1501 North Ash Street  
 Owasso, OK 74055

For proper credit please return top portion  
 To pay online via credit card, please visit:  
[www.ossba.org/payonline](http://www.ossba.org/payonline)

Customer ID	Customer Name	Purchase Order No.	Due Date		
6767	Owasso Public Schools		7/15/2026		
Item Number	Description	Ordered	Discount	Unit Price	Ext. Price
1000	2026 Membership Dues July 1, 2026 - June 30, 2027	1	\$0.00	\$5,796.00	\$5,796.00



The membership fee covers the provision of various services by the Oklahoma State School Boards Association to boards of education. Such services include legal information, publications, in-office consultations, answers to telephone and letter inquiries from school officials and school patrons, monitoring of state and federal education legislation, and other services designed to improve the quality of management of public education in Oklahoma. Member boards of education also receive reduced rates for workshop registrations, subscriptions and fee service programs.

<b>Subtotal</b>	\$5,796.00
<b>Tax</b>	\$0.00
<b>Total</b>	\$5,796.00

Questions?  
 Contact OSSBA at [accounting@ossba.org](mailto:accounting@ossba.org)



**Oklahoma State School Boards Assn.**  
 2801 N. Lincoln Blvd. Suite 125  
 Oklahoma City, OK 73105  
 405.528.3571 or 888.528.3571  
 Fax: 405.609.3091  
 EIN: 73-6636480

<b>Invoice</b>	48174
<b>Date</b>	7/15/2026
<b>Amount Due</b>	\$1,500.00
<b>Customer #</b>	6767

**Customer:**

Owasso Public Schools  
 1501 North Ash Street  
 Owasso, OK 74055

For proper credit please return top portion  
 To pay online via credit card, please visit:  
[www.ossba.org/payonline](http://www.ossba.org/payonline)

Customer ID	Customer Name	Purchase Order No.		Due Date	
6767	Owasso Public Schools			7/15/2026	
Item Number	Description	Ordered	Discount	Unit Price	Ext. Price
3105	2026 Policy Service July 1, 2026 - June 30, 2027	1	\$0.00	\$1,500.00	\$1,500.00

<b>Subtotal</b>	\$1,500.00
<b>Tax</b>	\$0.00
<b>Total</b>	\$1,500.00

Questions?  
 Contact OSSBA at [accounting@ossba.org](mailto:accounting@ossba.org)



**Oklahoma State School Boards Assn.**  
 2801 N. Lincoln Blvd. Suite 125  
 Oklahoma City, OK 73105  
 405.528.3571 or 888.528.3571  
 Fax: 405.609.3091  
 EIN: 73-6636480

<b>Invoice</b>	47208
<b>Date</b>	7/15/2026
<b>Amount Due</b>	\$3,000.00
<b>Customer #</b>	6767

**Customer:**

Owasso Public Schools  
 1501 North Ash Street  
 Owasso, OK 74055

For proper credit please return top portion  
 To pay online via credit card, please visit:  
[www.ossba.org/payonline](http://www.ossba.org/payonline)

Customer ID	Customer Name	Purchase Order No.		Due Date	
6767	Owasso Public Schools			7/15/2026	
Item Number	Description	Ordered	Discount	Unit Price	Ext. Price
3502	2026 Assemble for Education - July 1, 2026 - June 30, 2027	1	\$0.00	\$3,000.00	\$3,000.00

<b>Subtotal</b>	\$3,000.00
<b>Tax</b>	\$0.00
<b>Total</b>	\$3,000.00

Questions?  
 Contact OSSBA at [accounting@ossba.org](mailto:accounting@ossba.org)



# Software Service Order Agreement

Term of Agreement: 7/1/2026 - 6/30/2027

**Customer:** OWASSO PUBLIC SCHOOLS

**Addr:** 1501 NORTH ASH  
OWASSO OK 74055-4999

**October Membership:** 9749

SYLOGISTED, INC.

**Addr:** 908 EAST 35TH STREET  
SHAWNEE, OK 74804

**Phone:** (800)749-5691 **Email:** accounts@sylogist.com

## Re-Occurring Fiscal Year Charges

Re-Occurring Fiscal Year Charges are based on the membership (200 minimum) from the latest October 1 count.

Description	Total
Appropriated Funds	\$17,840.67
Payroll	\$750.00
- Usage Fee Included In Appropriated Funds	
-Additional Contact(s): 3 - Amount: \$750.00	
Treasurer	\$3,704.62
Activity Funds	\$1,852.31
Personnel	\$4,704.62
-Additional Contact(s): 4 - Amount: \$1,000.00	
Purchase Requisition	\$3,704.62
Fixed Assets	NA
Document Management	\$16,963.26
Time & Talent	NA
Accounting Query Designer	NA
<b>Total 2026-2027 Fiscal Year Charges:</b>	<b>\$49,520.10</b>

### Terms and Conditions

- The software charge includes phone support for one (1) designated contact per application, excluding Document Management. Additional contacts can be added at an additional cost. SylogistEd, Inc. shall provide the phone support during normal business hours of 8:00 a.m. to 5:00 p.m. CST, Monday through Friday, exclusive of holidays. SylogistEd, Inc. shall have full and free access to the Customer equipment and software to provide support.
- The software charge includes interactive online training via training videos and webinars.
- On-site training (by appointment only) will be charged \$1000.00 per day from 9:30 a.m. through 3:30 p.m. CST and round-trip mileage at the current IRS mileage rate. Additional time is \$165.00 per hour.
- For each renewal, the fees may, at SylogistEd's discretion, increase by an amount not to exceed 5%, no more than one time per annum.
- Customer agrees that SylogistEd, Inc. shall not be liable to Customer for any incidental or consequential damages, loss, or other liabilities arising out of the use or inability to use the software.
- The terms and conditions of this agreement supersede those of all previous agreements between the parties with respect to the use of the software

and such use hereafter is subject to the terms and conditions of this agreement.

7. This agreement shall be governed by the Laws of the State of Oklahoma.

### **Software as a Service**

1. Definitions.

- (a) Application means the software and other material used by SylogistEd, Inc. to access, configure, and provide the Services. The Application(s) identified in the Service Order Agreement are licensed on a subscription basis and delivered as hosted online software using the Software as a Service (SaaS) model.
- (b) Charges mean the fees payable by Customer pursuant to the Software Service Order Agreement.
- (c) Customer Data means any data that Customer sends to the Service and any data that Customer receives from the Service in fulfillment of a request, excluding any content deemed to be Intellectual Property.
- (d) Documentation means instructions and examples pertaining to appropriate integration with and proper use of the Services.
- (e) Intellectual Property Rights means all intellectual property rights, including patents, trademarks, trade name, service mark, copyright, trade secrets, know-how, process, technology, development tool, ideas, concepts, design right, domain names, moral right, database right, methodology, algorithm and invention, and any other proprietary information (whether registered, unregistered, pending, or applied for).
- (f) Privacy Policy and Terms of Service means the SylogistEd, Inc. Privacy Policy and Terms of Service in effect at the time of this Agreement, which is incorporated herein by reference and which is subject to change without notice.
- (g) Service shall have the meaning set forth in the SylogistEd, Inc. Privacy Policy and Terms of Service.
- (h) Service Order Agreement means the Software Service Order Agreement delivered by SylogistEd, Inc. to Customer which sets forth the service and fees for the current fiscal year.
- (i) Usage Data means any data that SylogistEd, Inc. collects or generates during the performance of the Service, including non-confidential elements of Customer Data.

2. Service.

- (a) SylogistEd, Inc. Obligations. SylogistEd, Inc. hereby agrees, subject to and during the term of this Agreement and the Privacy Policy and Terms of Service: (i) to provide the Service to Customer; (ii) to grant or procure a right for Customer to access and use the Application as a part of the Service only; (iii) to use all commercially reasonable efforts to prevent unauthorized access to, or use of, the Service; and (iv) to notify customer promptly of any such unauthorized access to, or use of, the Service that SylogistEd, Inc. becomes aware of (provided SylogistEd, Inc. is not required to actively monitor the Customer's account access).
- (b) Customer Obligations. Customer hereby agrees, as allowed by Oklahoma constitution or law, subject to and during the term of this Agreement: (i) to comply with the Privacy Policy and Terms of Service; (ii) not to reverse-engineer the Application; (iii) to use an appropriate integration method for the volume and/or nature of queries to the Service; (iv) that it is solely responsible for all of its activities and for the accuracy, integrity, legality, reliability, and appropriateness of all Customer Data; (v) to use all commercially reasonable efforts to prevent unauthorized access to, or use of, the Service, and notify SylogistEd, Inc. promptly of any such unauthorized use; (vi) to comply with all applicable laws in using the Service, wherever such use occurs, and not use, or require SylogistEd, Inc. to use, any Customer Data obtained via the Service for any unlawful purpose; and (vii) to accurately represent Customer's use of the Service and data obtained from the Service.

3. Service Order Agreement. The Service Order Agreement will be effective only when signed by Customer and SylogistEd, Inc. Any modifications or changes to the Services under any executed Service Order Agreement will be effective only if and when memorialized in a mutually agreed written change order signed by both Parties.

4. Access to the Service, Attribution, and Charges.

- (a) Customer Accounts. Customer must provide SylogistEd, Inc. with valid contact information prior to receiving access to the Service in compliance with the Privacy Policy and Terms of Service.
- (b) Data Preparation & Configuration. Customer will ensure that: (i) Customer Data is in proper format as specified by the Documentation; and (ii) no other software, data, or equipment having an adverse impact on the Service has been introduced.

5. Availability, Maintenance, and Technical Support.

- (a) Availability & Maintenance. SylogistEd, Inc. will use commercially reasonable efforts to make the Service available. Downtime for maintenance, upgrades, enhancement, or any other reason, may be scheduled at any time.
- (b) Technical Support. Unless otherwise provided in the Service Order Agreement, SylogistEd, Inc. will offer technical and customer support on a first-come, first-served basis during regular business hours, Central Standard Time.

6. Third-Party Software Integration Acknowledgements, Representations, and Agreements. SylogistEd, Inc. will provide software as part of the Service that will allow the Customer to share data with third-party applications.

- (a) It is understood and agreed that SylogistEd, Inc. is not responsible for the security of the data once it has been provided by the Customer to a third party using the Service.
- (b) It is understood and agreed that SylogistEd, Inc. is not releasing this data to a third party. It is acknowledged and agreed that under no circumstance shall SylogistEd, Inc. be deemed to be a direct or indirect transferor of information/data to any third party. SylogistEd, Inc. is only providing software that will allow the Customer to share data with third-party applications.
- (c) Customer hereby represents that it is aware of all duties, requirements and restrictions set forth under The Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99), Children's Online Privacy Protection Act (COPPA) (15 U.S.C. §§ 6501-6508), the Health Insurance Portability and Accountability Act (HIPPA), the Health Information Technology for Economic and Clinical Health Act (HITECH Act), and any other law, statute, or ordinance.

- (d) Customer hereby represents that it shall perform all duties and requirements set forth under The Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99), Children's Online Privacy Protection Act (COPPA) (15 U.S.C. §§ 6501-6508), the Health Insurance Portability and Accountability Act (HIPAA), the Health Information Technology for Economic and Clinical Health Act (HITECH Act), and any other law, statute, or ordinance.
- (e) Customer hereby represents that it shall refrain from performing any act restricted under The Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99), Children's Online Privacy Protection Act (COPPA) (15 U.S.C. §§ 6501-6508), the Health Insurance Portability and Accountability Act (HIPAA), the Health Information Technology for Economic and Clinical Health Act (HITECH Act), and any other law, statute, or ordinance.
- (f) Customer hereby agrees that it shall, as allowed by Oklahoma constitution or law, defend, indemnify, reimburse, and make whole in any manner, SylogistEd, Inc. for any form of damages sustained as a direct or indirect result of the Customer's failure to follow any duty, requirement, restriction or other that is mandated under The Family Educational Rights and Privacy Act (FERPA) (20 U.S.C. § 1232g; 34 CFR Part 99), Children's Online Privacy Protection Act (COPPA) (15 U.S.C. §§ 6501-6508), the Health Insurance Portability and Accountability Act (HIPAA), the Health Information Technology for Economic and Clinical Health Act (HITECH Act), and any other law, statute, or ordinance. This shall include any and all attorney fees, costs, expenses, expert fees, and other that SylogistEd, Inc. could incur.
- (g) Customer represents that it shall obtain all necessary authorizations (including authorizations from any parent/guardian, student or other interested third person) as required by law before any information/data is transferred by it to a third party.
7. Intellectual Property Rights.
- (a) SylogistEd, Inc. Intellectual Property. SylogistEd, Inc. and its third-party licensors (as appropriate) shall retain all Intellectual Property Rights in the Service and Usage Data. Except as expressly set forth herein, no SylogistEd, Inc. Intellectual Property Rights are granted to Customer.
- (b) Customer Intellectual Property. Customer retains all Intellectual Property Rights in Customer Data. Customer grants SylogistEd, Inc. a license: (i) to use the Customer Data to the extent necessary for the performance of the Services; (ii) to keep an archival copy subject to the provisions of the relevant data protection regulations; and (iii) to create Usage Data by collecting non-confidential elements of Customer Data, such as dates, location codes, equipment types, carriers, and other data as determined by SylogistEd, Inc. and in conjunction with automatically generated data such as IP address, time, and frequency of access.
- (c) Feedback Relating to Services. SylogistEd, Inc. shall have a perpetual, royalty-free, irrevocable, worldwide license to use and incorporate into the Services any suggestions, ideas, modification requests, feedback, or other recommendations related to the Services provided by or on behalf of Customer.
- (d) Derivatives and Compilations of Usage Data. SylogistEd, Inc. shall have a perpetual, royalty-free, irrevocable, world-wide license to use, sublicense, and publish derivative works and compilations resulting from collection and analysis of Usage Data.
8. Privacy and Personal Information. (a) SylogistEd, Inc.'s Privacy Policy. SylogistEd, Inc.'s Privacy Policy and Terms of Service, made a part hereof, is available at <https://www.sylogist.com/privacy-policy>.
9. Term; Termination.
- (a) Term. This Agreement is effective for the fiscal year set forth in the Software Service Order Agreement unless earlier terminated by either Customer or SylogistEd, Inc.
- (b) Termination Without Cause. Customer may terminate this Agreement by discontinuing use of the Service and paying any remaining charges. SylogistEd, Inc. may terminate this Agreement by discontinuing its provision of the Service to Customer, in which case Customer is not obligated to pay any remaining charges.
- (c) Breach. SylogistEd, Inc. may terminate this Agreement if Customer breaches any material obligation provided hereunder, including Customer's obligations specified in Section 2(b), which breach is not cured within five (5) days of SylogistEd, Inc.'s notice to Customer.
10. Confidential & Proprietary Information. For purposes of this Section, a Party receiving Confidential & Proprietary Information (as defined below) shall be the "Recipient" and the Party disclosing such information shall be the "Discloser."
- (a) Acknowledgment. Customer hereby acknowledges that the Service (including any Documentation, source code, translations, compilations, partial copies, and derivative works used in connection with the Services) is provided using confidential and proprietary information belonging exclusively to SylogistEd, Inc. or its third-party licensor (as appropriate), and SylogistEd, Inc. hereby acknowledges that Customer Data contains confidential and proprietary information belonging exclusively to Customer or relating to its affairs (in each case, "Confidential & Proprietary Information"). Confidential & Proprietary Information does not include: (i) information already known or independently developed by Recipient outside the scope of this relationship by personnel not having access to any Confidential & Proprietary Information; (ii) information in the public domain through no wrongful act of Recipient, or (iii) information received by Recipient from a third-party who was free to disclose it.
- (b) Covenant. Recipient hereby agrees that during the Term and at all times thereafter it shall not use, commercialize, or disclose such Confidential & Proprietary Information of the Discloser to any person or entity, except to its own employees and agents having a "need to know" (and who themselves are bound by similar nondisclosure restrictions), and to such other recipients as the Discloser may approve in writing; provided that all such recipients shall have first executed a confidentiality agreement in a form acceptable to Discloser. Recipient shall not: (i) alter or remove from any Confidential & Proprietary Information of the Discloser any proprietary legend, or (ii) decompile, disassemble, or reverse engineer the Confidential & Proprietary Information (and any information derived in violation of such covenant shall automatically be deemed Confidential & Proprietary Information owned exclusively by the Discloser). Recipient shall use at least the same degree of care in safeguarding the Confidential & Proprietary Information of the Discloser as it uses in safeguarding its own confidential information, but in any event at least reasonable care. Upon termination or expiration of this Agreement, and regardless of whether a dispute may exist, Recipient shall, upon request by Discloser, return or destroy (as instructed by Discloser) all Confidential & Proprietary Information of Discloser in its possession or control and cease all further use thereof.
- (c) Injunctive Relief. Recipient acknowledges that violation of the provisions of this Section would cause irreparable harm to Discloser not adequately compensable by monetary damages. In addition to other relief, it is agreed that injunctive relief shall be available without necessity of posting bond to

prevent any actual or threatened violation of such provisions.

11. Notices. Notices sent to either Party shall be effective when delivered in person or transmitted electronically, one (1) day after being sent by overnight courier, two (2) days after being sent by first class mail postage prepaid to a physical address provided by the Customer, or five (5) days after being sent by email from SylogistEd, Inc. to the address in the Customer account. A copy of this Agreement and notices generated in good form shall be treated as "original" documents admissible into evidence unless a document's authenticity is genuinely placed in question.
12. Survival. Termination shall have no effect on the Parties' rights or obligations under Section 8 ("Privacy and Personal Information"); Section 10 ("Confidential & Proprietary Information"), Section 13 ("Independent Contractor Status"), any payment obligations or any provision which by its nature should survive.
13. Independent Contractor Status. Each Party and its employees and agents are independent contractors in relation to the other Party with respect to all matters arising under this Agreement. Nothing herein shall be deemed to establish a partnership, joint venture, association, or employment relationship between the Parties. Each Party shall remain responsible and shall, as allowed by Oklahoma constitution or law, indemnify and hold harmless the other Party, for the withholding and payment of all federal, state and local personal income, wage, earnings, occupation, social security, worker's compensation, unemployment, sickness and disability insurance taxes, payroll levies, or employee benefit requirements now existing or hereafter enacted and attributable to themselves and their respective people.
14. Miscellaneous. This document and the documents incorporated herein constitute the entire agreement between the Parties with respect to the subject matter hereof and supersede all other communications, whether written or oral. SylogistEd, Inc. reserves all rights not specifically granted herein. Neither Party shall be liable for delays caused by events beyond its reasonable control, except non-payment of amounts due hereunder shall not be excused by this provision. Any provision hereof found by a tribunal of competent jurisdiction to be illegal or unenforceable shall be automatically conformed to the minimum requirements of law and all other provisions shall remain in full force and effect. Waiver of any provision hereof in one instance shall not preclude enforcement thereof on future occasions.

Prepared By: Grant McLannon

Date Prepared: 4/4/2026

Accepted By (please circle one): Superintendent / Board President

Signature: \_\_\_\_\_

Date Accepted: \_\_\_\_\_

**Attn: Owasso Public Schools**

At Frontline Education, we remain committed to delivering value and growth for your district. We are building for your future and remain focused on:

- Delivering industry-leading solutions and technology for K-12
- Investing in research and innovation to enhance your experience
- 150+ new hires to strengthen the client success organization
- Driving an AI-powered transformation
- Backed by Roper Technologies for sustainable growth

## Frontline Education Renewal Quote: Q-252348

Description	Start Date	End Date	Qty	Rate	Amount
Absence & Time Solution	7/01/2026	6/30/2027	1	\$46,709.33	\$46,709.33
Applicant Tracking with Proactive Recruiting, unlimited usage for internal employees	7/01/2026	6/30/2027	1	\$14,679.57	\$14,679.57
Employee Evaluation Management, unlimited usage for internal employees	7/01/2026	6/30/2027	1	\$20,163.91	\$20,163.91
<b>Total</b>					<b>\$81,552.81</b>

Please confirm [receipt](#) of your quote

Any questions?

Please contact your dedicated Client Value Partner, Suzanne Venable at [svenable@frontlineed.com](mailto:svenable@frontlineed.com) or check out our new [Renewal FAQ](#) Resource Center.

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

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

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

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

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

# Owasso Public Schools

## 2027-28

### School Calendar

#### Important Dates

Aug. 12	.....	First Day of School
Sept. 6	.....	Labor Day*
Sept. 7	.....	District Collaboration Day*
Oct. 8	.....	End of First Quarter
Oct. 11	.....	District Collaboration Day*
Oct. 12	.....	Teacher Professional Development*
Oct. 13	.....	Parent-Teacher Conference Exchange Date*
Oct. 14-15	.....	Fall Break*
Nov. 22-26	.....	Thanksgiving Break*
Dec. 17	.....	End of Second Quarter
Dec. 20-31	.....	Winter Break*
Jan. 3	.....	District Collaboration Day*
Jan. 4	.....	Second Semester Begins
Jan. 17	.....	Martin Luther King Jr. Day*
Jan. 18	.....	Teacher Professional Development*
Feb. 21	.....	Presidents' Day*
March 10	.....	End of 3rd Quarter
March 13-17	.....	Spring Break*
March 20	.....	District Collaboration Day*
April 14	.....	Parent-Teacher Conference Exchange Date*
May 26	.....	Last Day of School
May 29	.....	Memorial Day*

\* No School

#### Inclement Weather Days

If school is closed due to winter weather or unforeseen circumstances, Inclement Weather Days will be used in consecutive order and treated as regular school days to make up for the missed time. These dates are March 10, March 31, April 17, May 25 & May 26. There will be no school on any unused Inclement Weather Day.

#### Bell Schedule

<i>Elementary</i>	8:30 a.m.	School Doors Open
	9:00 a.m.	School Day Begins
	3:45 p.m.	School Day Ends
<i>Secondary</i>	7:15 a.m.	School Doors Open
	8:00 a.m.	School Day Begins
	2:45 p.m.	School Day Ends
<i>Pre-K</i>	8:30 a.m.	AM PK School Doors Open
	9:00 a.m.	AM PK School Day Begins
	11:30 a.m.	AM PK School Day Ends
	1:05 p.m.	PM PK School Doors Open
	1:15 p.m.	PM PK School Day Begins
	3:45 p.m.	PM PK School Day Ends

#### Parent-Teacher Conferences

School Site	Dates	Time
Elementary Sites	Sept. 30 & Oct. 5 March 2 & March 7	4:15-7:15 p.m.
Secondary Sites	Sept. 23 & Sept. 28 Feb. 24 & Feb. 29	4-7 p.m.

#### Calendar Legend

First/Last Day of School	No School
Beginning of Quarter	End of Quarter
District Collaboration Day	Professional Development Day
Inclement Weather Day	Commencement

The Owasso Public Schools District calendar is subject to change.

Approved:

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

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

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

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

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

# Owasso Public Schools 2027-28

## 180-Day Employee Calendar

### Important Dates

Aug. 12.....	First Day of School
Sept. 6.....	Labor Day*
Sept. 7.....	District Collaboration Day*
Oct. 8.....	End of First Quarter
Oct. 11.....	District Collaboration Day*
Oct. 12.....	Teacher Professional Development*
Oct. 13.....	Parent-Teacher Conference Exchange Date*
Oct. 14-15.....	Fall Break*
Nov. 22-26.....	Thanksgiving Break*
Dec. 17.....	End of Second Quarter
Dec. 20-31.....	Winter Break*
Jan. 3.....	District Collaboration Day*
Jan. 4.....	Second Semester Begins
Jan. 17.....	Martin Luther King Jr. Day*
Jan. 18.....	Teacher Professional Development*
Feb. 21.....	Presidents' Day*
March 10.....	End of 3rd Quarter
March 13-17.....	Spring Break*
March 20.....	District Collaboration Day*
April 14.....	Parent-Teacher Conference Exchange Date*
May 26.....	Last Day of School
May 29.....	Memorial Day*

\* No School

### Inclement Weather Days

If school is closed due to winter weather or unforeseen circumstances, Inclement Weather Days will be used in consecutive order and treated as regular school days to make up for the missed time. These dates are March 10, March 31, April 17, May 25 & May 26. There will be no school on any unused Inclement Weather Day.

### Parent-Teacher Conferences

School Site	Dates	Time
Elementary Sites	Sept. 30 & Oct. 5 March 2 & March 7	4:15-7:15 p.m.
Secondary Sites	Sept. 23 & Sept. 28 Feb. 24 & Feb. 29	4-7 p.m.

The Owasso Public Schools District calendar is subject to change.

Approved:

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

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

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

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

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











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

March						
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12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

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

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

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

Calendar Legend	
	First/Last Day of School
	Beginning of Quarter
	Parent-Teacher Conference Exchange Date
	New Teacher Orientation (ESC)
	Inclement Weather Day
	No School
	End of Quarter
	Professional Development Day
	District Collaboration Day
	Commencement

# Owasso Public Schools

## 2027-28





### 245-Day Employee Calendar

#### Important Dates

Aug. 12.....	First Day of School
Sept. 6.....	Labor Day*
Sept. 7.....	District Collaboration Day*
Oct. 8.....	End of First Quarter
Oct. 11.....	District Collaboration Day*
Oct. 12.....	Teacher Professional Development*
Oct. 13.....	Parent-Teacher Conference Exchange Date*
Oct. 14-15.....	Fall Break*
Nov. 22-26.....	Thanksgiving Break*
Dec. 17.....	End of Second Quarter
Dec. 20-31.....	Winter Break*
Jan. 3.....	District Collaboration Day*
Jan. 4.....	Second Semester Begins
Jan. 17.....	Martin Luther King Jr. Day*
Jan. 18.....	Teacher Professional Development*
Feb. 21.....	Presidents' Day*
March 10.....	End of 3rd Quarter
March 13-17.....	Spring Break*
March 20.....	District Collaboration Day*
April 14.....	Parent-Teacher Conference Exchange Date*
May 26.....	Last Day of School
May 29.....	Memorial Day*

\* No School

#### Calendar Legend

-  Non-Working, Non-Paid Day
-  Paid Holiday
-  First/Last Day of School
-  District Collaboration Day



The Owasso Public Schools District calendar is subject to change.

Approved:

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

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

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

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

November						
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14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				
31						

December						
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January						
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February						
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# Owasso Public Schools

## 2027-28





### 260-Day Employee Calendar

#### Important Dates

Aug. 12.....	First Day of School
Sept. 6.....	Labor Day*
Sept. 7.....	District Collaboration Day*
Oct. 8.....	End of First Quarter
Oct. 11.....	District Collaboration Day*
Oct. 12.....	Teacher Professional Development*
Oct. 13.....	Parent-Teacher Conference Exchange Date*
Oct. 14-15.....	Fall Break*
Nov. 22-26.....	Thanksgiving Break*
Dec. 17.....	End of Second Quarter
Dec. 20-31.....	Winter Break*
Jan. 3.....	District Collaboration Day*
Jan. 4.....	Second Semester Begins
Jan. 17.....	Martin Luther King Jr. Day*
Jan. 18.....	Teacher Professional Development*
Feb. 21.....	Presidents' Day*
March 10.....	End of 3rd Quarter
March 13-17.....	Spring Break*
March 20.....	District Collaboration Day*
April 14.....	Parent-Teacher Conference Exchange Date*
May 26.....	Last Day of School
May 29.....	Memorial Day*

\* No School

#### Calendar Legend

-  Non-Working, Non-Paid Day
-  Paid Holiday
-  First/Last Day of School
-  District Collaboration Day



The Owasso Public Schools District calendar is subject to change.

Approved:

July						
S	M	T	W	T	F	S
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4	5	6	7	8	9	10
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January						
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June						
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25	26	27	28	29	30	

**Jessica Minahan, LLC**  
**Behavior Analyst – Author – Special Educator**  
136 Clark St. Unit #1, Waltham, MA 02453  
jessicaminahan.com

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Professional Development Contract

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**Dates/Times of Service:** October 13, 2026

**Time:** Full-day is 5-6 hours. Specific start and end times:

AM Session: 8:00-11:00 (Secondary)

Lunch Break: 11:00-12:00

PM Session: 12:00-3:00 (Elementary)

The plan is to do the presentation live and in-person unless public health circumstances deem it unsafe to do so. In that instance, Jessica Minahan will offer a virtual presentation option.

**Audience:** All Certified Employees for Owasso Public Schools (AM Session: Secondary and PM Session: Elementary)

**Services Provided:** Owasso Public Schools hereby engages Jessica Minahan to speak/consult on the topic of children with anxiety-related and challenging behavior for **one full-day presentation.**

**Location:** Owasso High School, Mary Glass Performing Arts Center,

**Fee:** \$6,500

**Contact:**

Ashley Hearn (Cell phone will be shared via email) (in case communication is needed at the time of the event)  
ashley.hearn@owassops.org

**Party Responsible for Payment:**

Owasso Public Schools % Ashley Hearn

1501 N. Ash, Owasso, OK 74055

[ashley.hearn@owassops.org](mailto:ashley.hearn@owassops.org) ; 918-272-8182

Payment for Services will be provided within 15 days of the event.

**Handouts:**

Owasso Public Schools is responsible for copying Jessica Minahan's handouts for the presentation. Handouts may not be posted to any website or distributed electronically without express written permission from Jessica Minahan.

**Ownership:**

This presentation may not be videotaped or recorded.

Videotaping, audiotaping, reproduction, distribution, publishing, display, modification, creation of derivative works, and otherwise of the Lecture/Seminar/Presentation/Handout/Materials/Text beyond use for Lecture/Seminar/Presentation/Workshop is not permitted.

The Lecture/Seminar/Presentation/Handout/Materials/Text cannot be distributed, published, or displayed for any purpose beyond this presentation and may not be distributed, published, or displayed for advertising and/or promotion for any purpose, including advertising and promotion and may not be reprinted in all languages.

All materials presented are copyrighted.

Jessica Minahan, PhD, BCBA shall retain all ownership and intellectual property rights in the Seminar/Webinar/Presentation/Lecture, including but not limited to, the right to use

Seminar/Webinar/Presentation/Lecture in any form, electronic or otherwise, for other purposes. If the Webinar/Presentation/Lecture is based on pre-existing text(s), Jessica Minahan, PhD, BCBA warrants that Jessica Minahan, PhD, BCBA, is the owner of the copyright in such text(s) or that Jessica Minahan, PhD, BCBA has the permission of the copyright owner to use the materials in the Seminar/Webinar/Presentation/Lecture.

**Indemnity:**

The Sponsoring organization warrants and represents that the presentation being given by the lecturer, as requested by Sponsoring organization, does not violate the laws, rules, regulations, and/or policies promulgated by any State, Federal, local, or county jurisdiction, including but not limited school districts. The Sponsoring organization also agrees to indemnify, hold harmless and defend the lecturer from and against any and all actions alleging or resulting in any fine, penalties, damages, sanctions, or liability, whether such actions are judicial, administrative, civil, or criminal alleging violations or noncompliance with any above-referenced laws, rules, regulations or policies brought by any person or entity.

**Force Majeure:**

The performance of this agreement by either party is subject to acts of God, government authority, disaster, civil disorders, terrorism, or other emergencies, any of which make it illegal or impossible to provide the services for the Presentation. This agreement may be terminated for any one or more of such reasons by written notice from one party to the other without liability, except for travel expenses, as stated in the next sentence. Under this agreement, Owasso Public Schools will be responsible for any non-refundable air travel expenses incurred by Jessica Minahan if cancellation is made after air travel reservations have been scheduled (typically scheduled 30-60 days prior to the event).

**Cancellation Policy:**

Cancellation by Owasso Public Schools, less than 30 days prior to the event will be charged the entire fee as described above.

Jessica Minahan reserves the right to cancel a presentation or consult date due to serious illness, severe weather, or a family emergency. She will try her best to reschedule the event within the same school year.

**A/V Equipment Requirements:**

1. Projector (compatible with a Mac) and Screen	3. Wireless microphone
2. Audio hookup	4. Extension cord
5. Jessica would like her laptop on the stage with her as opposed to far away in a booth	

The pricing details of this contract are confidential between Jessica Minahan and Owasso Public Schools. I agree to pay for the services outlined above at the rates specified and the period indicated.

\_\_\_\_\_  
Name - Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Street/P.O. Box

\_\_\_\_\_  
Phone

\_\_\_\_\_  
City/State/Zip

\_\_\_\_\_  
Jessica Minahan, PhD, BCBA, LABA

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

04/07/2026





## EXHIBIT E: GENERAL OFFERS OF TERMS

### Page 1 of 2: OFFER OF TERMS

Provider and the Subscribing LEA (named below) agree by signing this General Offer of Privacy Terms ("General Offer") that they are bound by the same terms as the DPA between Provider and Enid Public Schools ("Originating LEA") dated 4/22/2026.

Provider and Subscribing LEA agree that the information below will be replaced throughout the DPA with the information specific to the Subscribing LEA filled in below for the Subscribing LEA. This General Offer shall extend only to the terms set forth in this DPA and shall not necessarily bind Provider or Subscribing LEA to any other terms entered into between Provider and Originating LEA. Any commercial terms, such as price, term, or schedule of Services, relating to Subscribing LEA's use of the Provider's Services shall be determined solely between Provider and Subscribing LEA.

If Provider makes changes to Exhibit "A" or Exhibit "B" in accordance with sections 1.2 and 1.3 respectively, Provider must complete the Addendum template provided by the A4L Community and notify the Originating LEA and all Subscribing LEAs in accordance with the notification provisions of this DPA, of the Addendum's existence and contents. With regard to a Subscribing LEA, an Addendum is automatically incorporated into this DPA when Subscribing LEA is notified by Provider. If an Addendum modifies Exhibit "B", the LEA will have thirty (30) days from receipt to object. If no written objection is received it will become incorporated into the DPA between the parties.

The Provider may withdraw the General Offer (for future use or for LEAs that have not already accepted it) in the event of: (1) a material change in the applicable privacy statutes; or (2) a material change in the Services and products listed in the Service Agreement. Notification of a withdrawal shall be submitted to [ndpa\\_requests@A4L.org](mailto:ndpa_requests@A4L.org).

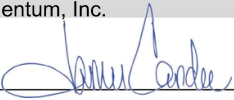
Subscribing LEAs shall send the signed Exhibit "E" to Provider at the following email address: agreements@edmentum.com

The below signatory confirms they are authorized to bind their institution to this DPA as in its entirety.

#### RESOURCE NAME(S):

[ Courseware, Study Island, Exact Path ]  
[ ]  
[ ]  
[ ]

PROVIDER: [ Edmentum, Inc. ]

Signed By:  Date: 4/22/2026  
Printed Name: Jamie Candee Title/Position: President / CEO

**Exhibit "E" (continued)**

Originating LEA: Enid Public Schools  
 Resource Names: Courseware, Study Island, Exact Path  
 Provider Name: Edmentum, Inc.

**Page 2 of 2:**

A Subscribing LEA, by signing a separate Service Agreement with Provider, and by its signature below, accepts the General Offer of Privacy Terms. The Subscribing LEA and the Provider shall therefore be bound by the same terms of this DPA for the term of the DPA between the Originating LEA and the Provider. **\*\*PRIOR TO ITS EFFECTIVENESS, SUBSCRIBING LEA MUST DELIVER NOTICE OF ACCEPTANCE TO PROVIDER.\*\*** Please note, by signing this Exhibit you are also agreeing to any language that may be included in Exhibits to the Originating DPA beyond this Exhibit "E". The below signatory confirms they are authorized to bind their institution to this DPA as in its entirety.

Subscribing LEA: Owasso Public Schools

Signed By: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_ Title/Position: \_\_\_\_\_

School District Name: Owasso Public Schools

**Designated Representative of LEA:**

Name: Michelle Baker Title: Executive Director of Technology

Address: 1501 N Ash Owasso, OK 74055

Telephone: 918-928-4055 Email: michelle.baker@owassops.org

**Notices to Subscribing LEA:** The Provider and Subscribing LEA are each responsible to promptly notify the other Party of changes to the notice information.

**Security Notices to Subscribing LEA**

Michelle Baker  
 Executive Director of Technology  
 1501 N Ash Owasso, OK 74055  
 michelle.baker@owassops.org

With a copy to (if provided):  
 Rosenstein, Fist & Ringold  
 525 S. Main, Suite 700 Tulsa, Oklahoma 74103  
 borainey@rflaw.com



# STANDARD STUDENT DATA PRIVACY AGREEMENT

(Oklahoma National Data Privacy Agreement (NDPA) Standard VERSION 2)

Enid Public Schools

And

Edmentum, Inc.

Version 2

***Authored by Members of the Student Data Privacy Consortium (SDPC) &***

***Mark Williams, Fagen, Friedman & Fulfrost LLP***

© Access 4 Learning (A4L) Community. All Rights Reserved.

*This document may only be used by A4L Community members and may not be altered in any substantive manner.*

This Student Data Privacy Agreement (“DPA”) is entered into on the date of full execution (the “Effective Date”) and is entered into by and between:

[Enid Public Schools ],

located at [ 500 S. Independence Enid OK 73701 ] (the “LEA”)

and

[ Edmentum, Inc. ],

located at [ 5600 W 83rd St., Suite 300 - 8200 Tower, Bloomington, MN 55437 ] (the “Provider”).

## PREAMBLE

**WHEREAS**, the Provider is providing educational or digital Services, as defined in Exhibit “A”, to LEA, which Services may include: (a) cloud-based Services for the digital storage, management, and retrieval of pupil records; and/or (b) digital educational software that authorizes Provider to access, store, and use pupil records; and

**WHEREAS**, the Provider and LEA have entered into a Service Agreement (as defined herein), to provide certain Services to the LEA as set forth in the Service Agreement, and this DPA (collectively the “Agreement”),

**WHEREAS**, the Provider and LEA recognize the need to protect personally identifiable student information and other regulated data exchanged between them as required by applicable laws and regulations, such as the Family Educational Rights and Privacy Act (“FERPA”) at 20 U.S.C. 1232g (34 C.F.R. Part 99); the Protection of Pupil Rights Amendment (“PPRA”) at 20 U.S.C. 1232h; and the Children’s Online Privacy Protection Act (“COPPA”) at 15 U.S.C. 6501-6506 (16 C.F.R. Part 312),

**WHEREAS**, the Provider and LEA desire to enter into this DPA for the purpose of establishing their respective obligations and duties in order to comply with applicable laws and regulations.

**NOW THEREFORE**, for good and valuable consideration, LEA and Provider agree as follows:

### *General Offer of Privacy Terms.*

The Provider has signed Exhibit “E” to the SDPC Standard Clauses, otherwise known as “General Offer of Privacy Terms” enabling other LEAs to enter into the same terms of this DPA with Provider.

### *Special Provisions. (Check if Required)*

If checked, the Supplemental State Terms attached hereto as Exhibit “G” are hereby incorporated by reference into this DPA in their entirety.

*If the Parties desire to change any terms, use the ‘Vendor-Specific’ Agreement or ‘District-Modified’ Agreement.*

The **designated representative for the LEA** for this DPA is:

Name: Jeffery Herbel Title: Director of IT

Address: 500 S. Independence Enid OK 73701

Phone: 580-366-7070 Email: jaherbel@enidk12.org

The **designated representative for the Provider** for this DPA is:


Name: Agreements Team Title: Contract Administrator

Address: 5600 W 83rd St., Suite 300 - 8200 Tower, Bloomington, MN 55437

Phone: 800-447-5283 Email: agreements@edmentum.com

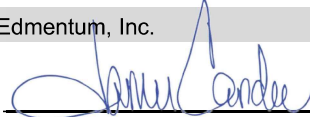
**IN WITNESS WHEREOF, LEA and Provider execute this DPA as of the Effective Date.**

**LEA:** [ Enid Public Schools ]

Signed By:  Date: 4-22-2026

Printed Name: Jeffery Herbel Title/Position: Director of IT

**PROVIDER:** [ Edmentum, Inc. ]

Signed By:  Date: 4/22/2026

Printed Name: Jamie Candee Title/Position: President / CEO

Each Party is responsible to promptly notify the other Party of changes to the notice information.

**Notices to Provider**

- [ Edmentum, Inc. ]
- [ Contract Administrator ]
- [ 5600 W 83rd St., Suite 300 - 8200 Tower, Bloomington, MN 55437 ]
- [ agreements@edmentum.com ]

**Notices to LEA**

- [ Enid Public Schools ]
- [ LEA Role ]
- [ 500 S. Independence Enid OK 73701 ]
- [ LEA Email Address ]

With a copy to (if provided):

- [ ]
- [ ]
- [ ]

With a copy to (if provided):

- [ Same ]
- [ Same ]
- [ Same ]

**Security Notices to Provider** (Required per Section 5.3)

- [ Graham Lyden ]
- [ VP Eng, Entrps Svcs ]
- [ 5600 W 83rd St., Suite 300 - 8200 Tower, Bloomington, MN 55437 ]
- [ graham.lyden@edmentum.com ]

**Security Notices to LEA** (Required per Section 5.3)

- [ ]
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# STANDARD CLAUSES

## ARTICLE I: PURPOSE AND SCOPE

### 1.1 Purpose of DPA.

The purpose of this DPA is to describe the duties and responsibilities to protect Student Data including compliance with all applicable federal and state privacy laws, rules, and regulations, all as may be amended from time to time. In performing the Services, the Provider shall be considered a School Official with a legitimate educational interest, and performing Services otherwise provided by the LEA. With respect to its use and maintenance of Student Data, Provider shall be under the direct control and supervision of the LEA as set forth in this DPA and the Service Agreement.

### 1.2 Description of Products and Services.

A description of all products and services covered by the Agreement, and information specific to this DPA, are listed in Exhibit "A". If a Provider needs to update any information on Exhibit "A" (such as updating with new provided services), they may do so by completing the Addendum template provided by the A4L Community and sending a copy to the LEA.

Provider may add or delete products or services subject to this DPA under the following circumstances:

1. Deleted products or services: The products or services have been discontinued and are no longer available from the Provider.
2. Added products or services: The added products or services are either:
  - a. a direct replacement, or substantially equivalent to the original products or services listed in the DPA, or
  - b. the added products or services result in enriched new or enhanced capabilities, new modules, technology advancements and or service categories relating to the listed products or services that Provider did not have at the time the DPA was signed.

If an added product or service requires additional Data Elements, Provider must complete the relevant portion of the Addendum template to update Exhibit "B".

Provider may not make any change to Exhibit "A" via an Addendum, except adding or deleting products or services. LEA is under no obligation to acquire added products or services, and has no ability under the DPA to prevent deletion of products or services. Subject to the limitations in this section, an Addendum is automatically incorporated into this DPA when LEA is notified by Provider, in accordance with the notification provisions of this DPA, of the Addendum's existence and contents.

### 1.3 Student Data to Be Provided.

In order to perform the services, the Provider shall process Student Data as identified by the Provider in the Schedule of Data, attached hereto as Exhibit "B". Student Data may be provided by the LEA or created by students, as set forth fully in the definition of Student Data in Exhibit "C". If a Provider needs to update any information on Exhibit "B", they may do so by completing the Addendum template provided by the A4L Community and sending a copy to the LEA.

Provider may delete data elements from Exhibit "B" if they are no longer used by the Provider.

Provider must add data elements to Exhibit “B”, when a material change has occurred, regardless of whether the added data elements are either one of the following:

1. used to better deliver the original products or services listed in the DPA, or
2. used to deliver added products or services that result in new or enhanced capabilities, new modules, technology advancements and or service categories relating to the listed products or services that Provider did not have at the time the DPA was signed. Such new products or services must be designated in the Addendum template as changes to Exhibit “A”.

The Provider must notify the LEA, in accordance with the notification provisions of this DPA, of the existence and contents of an Addendum modifying Exhibit “B”. The LEA will have thirty (30) days from receipt to object to the Addendum. If no written objection is received it will become incorporated into the DPA between the parties.

#### **1.4 DPA Definitions.**

Capitalized terms used in this DPA shall have the meanings set forth in Exhibit “C”. With respect to the treatment of Student Data, in the event of a conflict, definitions used in this DPA shall prevail over terms used in any other writing, including, but not limited to, the Service Agreement.

## **ARTICLE II: DATA OWNERSHIP AND AUTHORIZED ACCESS**

### **2.1 Student Data Property of LEA.**

As between LEA and Provider, all Student Data processed by the Provider, or created by students (as set forth fully in the definition of Student Data in Exhibit “C”), pursuant to the Agreement is and will continue to be the property of and under the control of the LEA. The Provider further acknowledges and agrees that all copies of such Student Data processed by the Provider, including any modifications or additions or any portion thereof from any source, are also subject to the provisions of this DPA in the same manner as the original Student Data. The Parties agree that as between them, all rights, including all intellectual property rights in and to Student Data contemplated per the Service Agreement, shall remain the exclusive property of the LEA.

### **2.2 Parent, Legal Guardian and Student Access.**

The LEA shall establish reasonable procedures by which a parent, legal guardian, or eligible student (as defined in FERPA) may review Student Data and request deletion or modification, and request delivery of a copy of the Student Data. In support of this, the Provider shall establish reasonable procedures by which the LEA may access, and correct if necessary, Education Records and/or Student Data, and make a copy of the data available to the LEA or (at the LEA’s direction) to the parent, legal guardian or eligible student directly. If the LEA is not able to review or update the Student Data itself, Provider shall respond in a reasonably timely manner (and no later than thirty (30) days from the date of the request or pursuant to the time frame required under state law for an LEA to respond to a parent, legal guardian or student, whichever is sooner) to the LEA’s request for Student Data held by the Provider to view or correct as necessary.

In the event that a parent or legal guardian of a student or eligible student contacts the Provider to correct, delete, review or request delivery of a copy of any of the Student Data collected by or generated through the Services, the Provider shall refer that person to the LEA, who will follow the necessary and proper procedures regarding

the requested information. In the event that any person other than those listed contacts the Provider about any Student Data, the Provider shall refer that person to the LEA, except as provided in Section 4.4.

- 2.2.1 This NDPA does not impede the ability of students to download, export, or otherwise save or maintain their own Student Generated Content directly from Provider or for Provider to provide a mechanism for such download, export, transfer or saving to students, or the student's parent or legal guardian. Nor does it impede the ability of Providers to offer LEAs features to allow such ability.
- 2.2.2 In the event that Student Generated Content is transferred to the control of the student, parent or legal guardian, the copy of such Student Generated Content that is in the control of such person is no longer considered Student Data.

### **2.3 Subprocessors.**

Provider shall enter into a Subprocessor Agreement with all Subprocessors performing functions for the Provider in order for the Provider to provide the Services pursuant to the Service Agreement, whereby the Subprocessors agree to protect Student Data in a manner no less stringent than the terms of this DPA. Every Subprocessor Agreement must provide that the Subprocessor will not Sell the Student Data. The terms of a Subprocessor Agreement shall not be materially modified by the Subprocessor unless notice is provided to the Provider.

## **ARTICLE III: DUTIES OF LEA**

### **3.1 Provide Data in Compliance with Applicable Laws.**

LEA shall use the Services and provide Student Data in compliance with all applicable federal and state privacy laws, rules, and regulations, all as may be amended from time to time.

### **3.2 Annual Notification of Rights.**

If the LEA has a policy of disclosing Education Records and/or Student Data under FERPA (34 CFR § 99.31(a)(1)), LEA shall include a specification of criteria for determining who constitutes a School Official and what constitutes a legitimate educational interest in its annual notification of rights.

### **3.3 Reasonable Precautions.**

LEA shall employ administrative, physical, and technical safeguards designed to protect usernames, passwords, and any other means of gaining access to the Services and/or hosted Student Data from unauthorized access, disclosure, or acquisition by an unauthorized person.

### **3.4 Unauthorized Access Notification and Assistance.**

LEA shall notify Provider within seventy-two (72) hours of any confirmed Data Breach to the Services, LEA's account or any Student Data that poses a privacy or security risk. If requested by Provider, LEA will provide reasonable assistance to Provider in any efforts by Provider to investigate and respond to such Data Breach.

## ARTICLE IV: DUTIES OF PROVIDER

### 4.1 Privacy and Security Compliance.

The Provider shall comply with all laws and regulations applicable to Provider's protection of Student Data privacy and security, and at the direction of the LEA shall cooperate with any state or federal government initiated audit of the LEA's use of the Services.

### 4.2 Authorized Use.

The Student Data processed pursuant to the Services shall be used by the Provider for no purpose other than performing the Services outlined in Exhibit "A", or as instructed by the LEA.

### 4.3 Provider Employee Obligation.

Provider shall require all of Provider's employees who have access to Student Data to comply with all applicable provisions of this DPA with respect to the Student Data shared under the Service Agreement. Provider agrees to require and maintain an appropriate confidentiality agreement from each employee with access to Student Data pursuant to the Service Agreement.

### 4.4 No Disclosure.

Provider acknowledges and agrees that it shall not sell or disclose any Student Data or any portion thereof, including without limitation, user content or other non-public information and/or personally identifiable information contained in the Student Data.

#### 4.4.1 Exceptions to No Disclosure.

- 4.4.1.1 This prohibition against disclosure will not apply to Student Data where disclosure is directed or permitted by the LEA or this DPA.
- 4.4.1.2 The provision to not sell Student Data shall not apply to a Change of Control.
- 4.4.1.3 This prohibition against disclosure shall not apply to Student Data disclosed pursuant to a judicial order or lawfully issued subpoena or warrant.
- 4.4.1.4 This prohibition against disclosure shall not apply to Student Data disclosed to Subprocessors performing Services on behalf of the Provider pursuant to this DPA.
- 4.4.1.5 Should law enforcement or other government entities ("Requesting Party(ies)") provide a judicial order or lawfully issued subpoena or warrant to the Provider with a request for Student Data held by the Provider pursuant to the Services, the Provider shall notify the LEA in advance of a compelled disclosure to the Requesting Party.
- 4.4.1.6 Notification under 4.4.1.5 is not required if the judicial order or lawfully issued subpoena or warrant states not to inform the LEA of the request.
- 4.4.1.7 Should the LEA be presented with a judicial order or lawfully issued subpoena or warrant to disclose Student Generated Content or other Student Data, the Provider shall cooperate with the LEA in delivering such data.

- 4.4.1.8 This prohibition against disclosure shall not apply to LEA-authorized users of the Services, which may include parents and legal guardians.
- 4.4.1.9 This prohibition against disclosure shall not apply to protect the safety of users or others, if and only if, an LEA employee who has specifically been authorized to declare a health or safety emergency has done so and all requirements under 34 CFR §§ 99.31(a)(10) and 99.36 have been fulfilled by the LEA.
- 4.4.1.10 This prohibition against disclosure shall not apply to protect the integrity or security of the Service, where such disclosure is made to a Subprocessor engaged by Provider for the specific purpose of investigating a potential Data Breach as set forth in 5.4.

## 4.5 De-Identified Data

Provider agrees not to attempt to re-identify De-Identified Student Data without the written direction of the LEA. De-Identified Student Data may be used by the Provider for those purposes allowed under applicable laws, for the purposes allowed for the processing of Student Data under this DPA, as well as the following purposes: (1) assisting the LEA or other governmental agencies in conducting research and other studies; (2) research, development, and improvement of the Provider's educational sites, Services, or applications, and to demonstrate the effectiveness of the Services; and (3) for adaptive learning purpose and for customized student learning. Provider's use of De-Identified Student Data shall survive termination of this DPA or any request by LEA to return or dispose of Student Data. Except for Subprocessors, Provider agrees not to transfer De-identified Student Data to any third party unless the transfer is expressly directed or permitted by the LEA or this DPA. Such Subprocessors must be subject to equivalent terms of the DPA including this one. Prior to publishing any document that names the LEA, the Provider shall obtain the LEA's written approval of the manner in which De-Identified Student Data is presented. If Provider chooses to create De-Identified Data, its process must comply with either NIST de-identification standards or US Department of Education guidance on de-identification.

## 4.6 Disposition of Data.

Upon written request from the LEA, Provider shall dispose of or provide a mechanism for the LEA to transfer Student Data obtained under the Service Agreement, within sixty (60) days of the date of said request and according to a schedule and procedure as the Parties may reasonably agree.

If the Provider has a standard retention and destruction schedule, that schedule shall apply to Student Data as long as this DPA is active. The Provider's practice relating to retention and disposition of Student Data shall be provided to the LEA upon request.

At the termination of this DPA, the Provider shall, unless directed otherwise by the LEA, dispose of, or delete Student Data obtained by the Provider under the Agreement within sixty (60) days of termination (unless otherwise required by law). If the Agreement has lapsed or is not terminated, the Student Data shall be deleted when directed or permitted by the LEA, according to Provider's standard destruction schedule, or as otherwise required by law. The LEA may provide the Provider with special instructions for the disposition of the Student Data, by transmitting to Provider Exhibit "D", attached hereto. The duty of the Provider to dispose of or delete Student Data shall not extend to De-Identified Data or to Student-Generated Content that has been transferred or kept pursuant to Section 2.2.2.

## 4.7 Advertising Limits.

Provider is prohibited from using, disclosing, or selling Student Data to (a) inform, influence, or enable Targeted Advertising; (b) develop a profile of a student, family member/guardian or group, for any purpose other than providing the Service to LEA; or (c) for any commercial purpose other than to provide the Service to the LEA, or as authorized by the LEA or the parent/guardian. Targeted Advertising is strictly prohibited. However, this section does not prohibit Provider from using Student Data (i) for adaptive learning or customized student learning (including generating personalized learning recommendations); or (ii) to make product recommendations to account holders that are not considered Targeted Advertising (this exception does not apply where the Provider is relying on the LEA to provide consent on behalf of the parent under COPPA); or (iii) to notify account holders about new education product updates, features, or Services that are not considered Targeted Advertising or from otherwise using Student Data as permitted in this DPA and its accompanying exhibits.

Before making product recommendations under section (ii) above, Provider must disclose the existence of those recommendations to LEA in writing, in sufficient detail that LEA can fulfill any obligations under applicable law (e.g. PPRA).

# ARTICLE V: DATA SECURITY AND BREACH PROVISIONS

## 5.1 Data Storage.

If Student Data is stored outside the United States, Provider will provide a list of Countries where data is stored, in Exhibit "B".

## 5.2 Security Audits.

Provider will conduct a security audit or assessment no less than once per year, and upon a Data Breach. Upon 10 days' notice and execution of confidentiality agreement, Provider will provide the LEA with a copy of the audit report, subject to reasonable and appropriate redaction.

## 5.3 Data Security.

The Provider agrees to utilize administrative, physical, and technical safeguards designed to protect Student Data from unauthorized access, disclosure, acquisition, destruction, use, or modification. The Provider shall adhere to any applicable law relating to data security of Student Data. The Provider shall implement an adequate Cybersecurity Framework that incorporates one or more of the nationally or internationally recognized standards set forth in Exhibit "F". Additionally, Provider may choose to further detail its security programs and measures in Exhibit "F". Provider shall provide, in the Preamble to the DPA, contact information of an employee who LEA may contact if there are any data security concerns or questions.

## 5.4 Data Breach.

In the event that Provider confirms a Data Breach, the Provider shall provide notification to LEA within seventy-two (72) hours of confirmation of the Data Breach, unless notification within these time limits would disrupt investigation of the Data Breach by law enforcement. In such an event, notification shall be made within a reasonable time after the Data Breach. Provider shall follow the following process:

- (1) The Data Breach notification described above shall include, at a minimum, the following information to the extent known by the Provider and as it becomes available:
  - (a) The name and contact information of the Provider subject to this section,
  - (b) the date of the notice,
  - (c) the date of the Data Breach, the estimated date of the Data Breach, or the date range within which the Data Breach occurred,
  - (d) Whether the notification was delayed as a result of a law enforcement investigation, if legally permissible to share that information,
  - (e) A general description of the Data Breach, if that information is possible to determine at the time the notice is provided,
  - (f) A description of the Student Data reasonably believed to have been the subject of the Data Breach; and
  - (g) Identification of impacted individuals.
- (2) Provider agrees to adhere to all applicable federal and state laws with respect to a Data Breach related to the Student Data, including any required responsibilities and procedures for notification and mitigation of any such Data Breach.
- (3) Provider further acknowledges and agrees to have a written Data Breach response plan that is consistent with applicable industry standards and federal and state law for responding to a Data Breach, involving Student Data and agrees to provide LEA, upon reasonable written request, with a summary of said written Data Breach response plan.
- (4) LEA shall provide notice and facts surrounding the Data Breach to the affected students, parents, or guardians.
- (5) In the event of a Data Breach originating from LEA's use of the Service or otherwise a result of LEA's actions or inactions, Provider shall reasonably cooperate with LEA to the extent necessary to expeditiously secure Student Data and may request costs incurred as a result of such Data Breach.

## CONTRACT TERMS

**Term and Termination.** In the event that either Party seeks to terminate this DPA, they may do so by written notice if the Service Agreement has lapsed or has been terminated. Either party may terminate this DPA and any Service Agreement or contract if the other party breaches any terms of this DPA. This DPA shall stay in effect for as long as the Provider retains the Student Data, as set forth in section Article IV, Section 4.6. In the case of a “Change of Control” the LEA has the authority to terminate the DPA if it reasonably believes that the successor cannot uphold the terms and conditions herein or having a contract with the successor would violate the LEA’s policies or state or federal law.

**Data Disposition on Service Agreement Termination.** If the Service Agreement is terminated, the Provider shall dispose of all of LEA’s Student Data pursuant to Article IV, Section 4.6 of the Standard Clauses.

**Notices.** All notices or other communication required or permitted to be given hereunder must be made in writing and may be given via e-mail transmission, or first-class mail, or mutually agreed upon method sent to the designated representatives documented in the Preamble.

**Priority of Agreements.** This DPA shall govern the treatment of Student Data in order to comply with the privacy protections, including those found in FERPA and all applicable privacy statutes identified in this DPA. With respect to the treatment of Student Data only, in the event there is conflict between the terms of the DPA and the Service Agreement, Terms of Service, Privacy Policies, or with any other bid/RFP, license agreement, or writing, the terms of this DPA shall apply and take precedence. In the event of a conflict between Exhibit “H”, the SDPC Standard Clauses, and/or the Supplemental State Terms in Exhibit “G”, Exhibit “H” will control, followed by Exhibit “G”. Except as described in this paragraph herein, all other provisions of the Service Agreement shall remain in effect.

**Entire Agreement.** This DPA and the Service Agreement (“the Agreement”) constitute the entire agreement of the Parties relating to the subject matter hereof and supersedes all prior communications, representations, or agreements, oral or written, by the Parties relating thereto. This DPA may be amended and the observance of any provision of this DPA may be waived (either generally or in any particular instance and either retroactively or prospectively) only with the signed written consent of both Parties.

**Severability.** Any provision of this DPA that is prohibited or unenforceable in any jurisdiction shall, as to such jurisdiction, be ineffective to the extent of such prohibition or unenforceability without invalidating the remaining provisions of this DPA, and any such prohibition or unenforceability in any jurisdiction shall not invalidate or render unenforceable such provision in any other jurisdiction. Notwithstanding the foregoing, if such provision could be more narrowly drawn so as not to be prohibited or unenforceable in such jurisdiction while, at the same time, maintaining the intent of the Parties, it shall, as to such jurisdiction, be so narrowly drawn without invalidating the remaining provisions of this DPA or affecting the validity or enforceability of such provision in any other jurisdiction.

**Governing Law; Venue and Jurisdiction.** This DPA will be governed by and construed in accordance with the laws of the state of the LEA, without regard to conflicts of law principles. Each party consents and submits to the sole and exclusive jurisdiction to the state and federal courts for the county of the LEA for any dispute arising out of or relating to this DPA or the transactions contemplated hereby.

**Successors Bound.** This DPA is and shall be binding upon the respective successors in interest to Provider in the event of a Change of Control. In the event of a Change of Control, the Provider shall provide written notice to the LEA no later than sixty (60) days after the closing date of such Change of Control. Such notice shall include

a written, signed assurance that the successor will assume the obligations of the DPA and any obligations with respect to Student Data within the Service Agreement.

**Authority.** Each signatory confirms they are authorized to bind their institution to this DPA in its entirety.

**Waiver.** No delay or omission by either party to exercise any right here under shall be construed as a waiver of any such right and both parties reserve the right to exercise any such right from time to time, as often as may be deemed expedient.

## EXHIBIT A: PRODUCTS AND SERVICES

This DPA covers access to and use of [ Edmentum, Inc. ]'s existing Services that collect, process, or transmit Student Data, as identified below:

Courseware  
Study Island  
Exact Path

## EXHIBIT B: SCHEDULE OF STUDENT DATA

All Data Elements identified in this Exhibit are correct at time of signature.

Data Elements Collected by Product (required and optional):

Category of Data / Data Elements	Coursew are	Study Island	Exact Path				
<b>Application Technology MetaData</b>							
IP Addresses of users, use of cookies, etc.							
Other application technology metadata							
<i>If 'Other' checked, please specify below checked box:</i>							
<b>Application Use Statistics</b>							
Meta data on user interaction with application							
<b>Assessment</b>							
Standardized test scores							
Observation data							
Voice recordings							
Other assessment data							
<i>If 'Other' checked, please specify below checked box:</i>							
<b>Attendance</b>							
Student school (daily) attendance data							

Category of Data / Data Elements	Courseware	Study Island	Exact Path				
Student class attendance data							
<b>Communication</b>							
Online communication captured (emails, blog entries)							
<b>Conduct</b>							
Conduct or behavioral data							
<b>Demographics</b>							
Data of birth	<input type="radio"/>		<input type="radio"/>				
Place of birth							
Gender	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Ethnicity or race			<input type="radio"/>				
Language information (native, or primary language spoken by student)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Other demographic information							
<i>If 'Other' checked, please specify below checked box:</i>							
<b>Enrollment</b>							
Student school enrollment		<input type="radio"/>					
Student grade level	R	R	R				
Homeroom		<input type="radio"/>					
Guidance counselor							
Specific curriculum programs							
Year of graduation	<input type="radio"/>		<input type="radio"/>				

Category of Data / Data Elements	Courseware	Study Island	Exact Path				
Other enrollment information							
<i>If 'Other' checked, please specify below checked box:</i>							
<b>Parent/Guardian Contact Information</b>							
Address							
Email	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Phone							
<b>Parent/Guardian ID</b>							
Parent ID number (created to link parents to students)							
<b>Parent/Guardian Name</b>							
First and/or last	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
<b>Schedule</b>							
Student scheduled courses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Teacher names	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
<b>Special Indicator</b>							
English language learner information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Low-income status	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Medical alerts/health data							
Student disability information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Specialized education Services (IEP or 504)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Living situations (homeless/foster care)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Other indicator information							

Category of Data / Data Elements	Courseware	Study Island	Exact Path				
<i>If 'Other' checked, please specify below checked box:</i>							
<b>Student Contact Information</b>							
Address							
Email	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Phone							
<b>Student Identifiers</b>							
Local (school district) ID number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
State ID number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Provider/app assigned student ID number							
Student app username	R	R	R				
Student app passwords	R	R	R				
<b>Student Name</b>							
First and/or last	R	R	R				
<b>Student In App Performance</b>							
Program/application performance (e.g. typing program – student types 60 wpm, reading program – student reads below grade level)							
<b>Student Program Membership</b>							
Academic or extracurricular activities a student may belong to or participate in							

<b>Student Survey Responses</b>							
Student responses to surveys or questionnaires							
<b>Student Work</b>							
Student generated content; writing, pictures, etc.							
Other student work data							
<i>If 'Other' checked, please specify below checked box:</i>							
<b>Transcript</b>							
Student course grades							
Student course data	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>				
Student course grades/performance scores	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>				
Other transcript data							
<i>If 'Other' checked, please specify below checked box:</i>							
<b>Transportation</b>							
Student bus assignment							
Student pick up and/or drop off location							
Student bus card ID number							
Other transportation data							

If 'Other' checked, please specify below checked box:							
<b>Other</b>							
Other data collected	X	X	X				
If 'Other' checked, please list each additional data element used, stored, or collected by your application below checked box:	Role Status (for access)	Role Status (for access)	Role Status (for access)				
<b>None</b>							
No student data collected at this time. Provider will immediately notify LEA if this designation is no longer applicable.							

If Student Data is stored outside the United States, Provider shall list below the Countries where data is stored:

## EXHIBIT C: DEFINITIONS

**Change of Control:** Any merger, acquisition, consolidation or other business reorganization or sale of all or substantially all of the assets of Provider or of the portion of Provider that performs the Services in the Service Agreement.

**Contextual Advertising:** Contextual advertising is the delivery of advertisements based upon a current visit to a Web page or a single search query, without the collection and retention of data about the consumer's online activities over time.

**De-Identified Data:** Records and information are considered to be De-Identified when all personally identifiable information has been removed or obscured, such that the remaining information does not reasonably identify a specific student, including, but not limited to, any information that, alone or in combination is linkable to a specific student.

**Data Breach:** An unauthorized release, access to, disclosure or acquisition of Student Data that compromises the security, confidentiality or integrity of the Student Data maintained by the Provider in violation of applicable state or federal law.

**Educational Records:** Educational Records shall have the meaning set forth under FERPA 20 U.S. C. 12 32 g(a)(5)(A). For additional context see also the 'Student Data' definition.

**LEA:** For the purpose of this DPA, the LEA is the educational entity that is a Party to this Agreement. An LEA can be a state agency, an educational service agency, a charter school or school system or a private school or school system, in addition to the federal definition of Local Education Agency (LEA).

**Metadata:** Means information that provides meaning and context to other data being collected including, but not limited to date and time records and purpose of creation. Metadata that have been stripped of all direct and indirect identifiers are not considered Personally Identifiable Information or Student Data.

**Originating LEA:** An educational entity otherwise meeting the definition of LEA that originally executes the DPA in its entirety (including the marked checkbox enabling Exhibit "E") with the Provider.

**School Official:** For the purposes of this DPA and pursuant to FERPA 34 CFR § 99.31(b), a School Official is a contractor that: (1) Performs an institutional service or function for which the agency or institution would otherwise use employees; (2) Is under the direct control of the agency or institution with respect to the use and maintenance of Student Data including Educational Records; and (3) Is subject to FERPA 34 CFR § 99.33(a) governing the use and re-disclosure of Personally Identifiable Information from Educational Records.

**Service Agreement:** Refers to the quote, corresponding contract, purchase order or terms of service and/or terms of use.

**Student Data:** Student Data includes any data, whether gathered, created or inferred by Provider or provided by LEA or its users, students, or students' parents/guardians, for a school purpose, that is descriptive of the student including, but not limited to, information in the student's Educational Record, persistent unique identifiers, or any other information or identification number that would provide information about a specific student. Student Data includes Metadata that has not been stripped of all direct and indirect identifiers. Student Data further includes "Personally Identifiable Information (PII)," as defined in 34 C.F.R. § 99.3 and as defined under any applicable state law. Student Data shall constitute Education Records for the purposes of this DPA, and for the purposes of federal, state, and local laws and regulations. Student Data as specified in Exhibit "B" is confirmed

to be collected or processed by the Provider pursuant to the Services. Student Data shall not include properly De- Identified Data or anonymous usage data regarding a student's or LEA's use of Provider's Services.

**Student Generated Content:** The term "Student Generated Content" means materials or content created by a student in the services including, but not limited to, essays, research reports, portfolios, creative writing, music or other audio files, photographs, videos, and account information that enables ongoing ownership of student content. "Student Generated Content" does not include student responses to a standardized assessment where student possession and control would jeopardize the validity and reliability of that assessment.

**Subprocessor:** For the purposes of this DPA, the term "Subprocessor" (sometimes referred to as the "Subcontractor") means a party other than LEA or Provider, who Provider uses for data collection, analytics, storage, or other service to operate and/or improve its service, and who has access to or storage of Student Data, including security, storage, analytics, and other processing activities necessary to perform a Provider business purpose.

**Subprocessor Agreement:** An agreement between Provider and a third party Subprocessor. A Subprocessor Agreement includes either a written agreement or an acceptance of terms and conditions (e.g., click through agreements).

**Subscribing LEA:** An educational entity otherwise meeting the definition of LEA that was not party to the original Service Agreement and who accepts the Provider's General Offer of Privacy Terms by executing Exhibit "E".

**Targeted Advertising:** Targeted Advertising means presenting an advertisement to a student where the selection of the advertisement is based on Student Data or inferred over time from the usage of the Provider Internet web site, online service or mobile application by such student or the retention of such student's online activities or requests over time for the purpose of targeting subsequent advertisements. "Targeted Advertising" does not include Contextual Advertising.

## EXHIBIT D: SPECIAL INSTRUCTIONS FOR DISPOSITION OF DATA

After this DPA takes effect, if the LEA has special requirements for the disposition of Student Data that are not expressed in 4.6 Disposition of Data, the LEA may fill in this form and deliver it to the Provider.

**The Provider and the LEA must not fill in this form at the initiation of the DPA.**

The Provider shall act on Exhibit "D" from the designated representative of the LEA or their designee (Preamble or Exhibit "E" for Subscribing LEA).

Enid Public Schools ("LEA") instructs Provider to dispose of Student Data obtained by Provider pursuant to the terms of the DPA between LEA and Provider. The terms of the Disposition are set forth below:

### 1. Extent of Disposition

Disposition is partial. The scope of Student Data to be disposed of is set forth below or found in an attachment to this Directive:

Insert categories of Student Data here

Disposition is complete. Disposition extends to all Student Data.

### 2. Nature of Disposition

Disposition shall be by destruction or deletion of Student Data.

Disposition shall be by a transfer of Student Data. The Student Data shall be transferred to the following site as follows:

Insert or attach special instructions

### 3. Timing of Disposition

Student Data shall be disposed of by the following date:

As soon as commercially practicable

On Provider's standard destruction schedule

By Insert Date

### 4. De-Identified Data

The Provider certifies that they have De-Identified the data, as defined elsewhere in this Agreement, and disposed of all copies of Student Data that were not De-Identified in accordance with this Schedule and the DPA. The Provider will notify LEA in accordance with the notification requirements of the DPA using this form.

As of Enter Date

### 5. Other:

Signature(s)

Notice of Verified Disposition of Data

\_\_\_\_\_  
Authorized Representative of  
LEA

\_\_\_\_\_  
Date

\_\_\_\_\_  
Authorized Representative of  
Provider

\_\_\_\_\_  
Date

# EXHIBIT E: GENERAL OFFERS OF TERMS

## Page 1 of 2: OFFER OF TERMS

Provider and the Subscribing LEA (named below) agree by signing this General Offer of Privacy Terms (“General Offer”) that they are bound by the same terms as the DPA between Provider and Enid Public Schools (“Originating LEA”) dated 4/22/2026.

Provider and Subscribing LEA agree that the information below will be replaced throughout the DPA with the information specific to the Subscribing LEA filled in below for the Subscribing LEA. This General Offer shall extend only to the terms set forth in this DPA and shall not necessarily bind Provider or Subscribing LEA to any other terms entered into between Provider and Originating LEA. Any commercial terms, such as price, term, or schedule of Services, relating to Subscribing LEA’s use of the Provider’s Services shall be determined solely between Provider and Subscribing LEA.

If Provider makes changes to Exhibit “A” or Exhibit “B” in accordance with sections 1.2 and 1.3 respectively, Provider must complete the Addendum template provided by the A4L Community and notify the Originating LEA and all Subscribing LEAs in accordance with the notification provisions of this DPA, of the Addendum’s existence and contents. With regard to a Subscribing LEA, an Addendum is automatically incorporated into this DPA when Subscribing LEA is notified by Provider. If an Addendum modifies Exhibit “B”, the LEA will have thirty (30) days from receipt to object. If no written objection is received it will become incorporated into the DPA between the parties.

The Provider may withdraw the General Offer (for future use or for LEAs that have not already accepted it) in the event of: (1) a material change in the applicable privacy statutes; or (2) a material change in the Services and products listed in the Service Agreement. Notification of a withdrawal shall be submitted to [ndpa\\_requests@A4L.org](mailto:ndpa_requests@A4L.org).

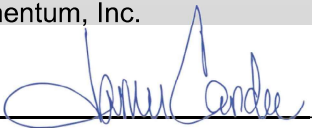
Subscribing LEAs shall send the signed Exhibit “E” to Provider at the following email address: agreements@edmentum.com

The below signatory confirms they are authorized to bind their institution to this DPA as in its entirety.

### RESOURCE NAME(S):

[ Courseware, Study Island, Exact Path ]  
[ ]  
[ ]  
[ ]

PROVIDER: [ Edmentum, Inc. ]

Signed By:  Date: 4/22/2026  
Printed Name: Jamie Candee Title/Position: President / CEO



## EXHIBIT F: ADEQUATE CYBERSECURITY FRAMEWORKS

Provider must mark one or more frameworks with which it complies.

The Provider may change which framework it complies with without invalidating or changing the DPA, but must notify the LEA of such change in accordance with the notification requirements of the DPA.

FRAMEWORK(S)	
	Global Education Security Standard - <a href="https://sdpc.a4l.org/gess/">https://sdpc.a4l.org/gess/</a>
	NIST Cybersecurity Framework (CSF)
X	NIST SP 800-53 Security and Privacy Controls for Information systems and organizations
	NIST SP 800-171 Protecting Controlled Unclassified Information in Nonfederal Systems and Organizations
	ISO 27000 series, Standards for implementing organization security and management practices
	CIS Center for Internet Security Critical Security Controls
	Cybersecurity Maturity Model Certification (CMMC, ~FAR/DFAR)

This space is provided for optional security programs and measures as noted in section 5.3:

## EXHIBIT G: Supplemental SDPC State Terms for Oklahoma

*[The State Supplement is an optional set of terms that will be generated on an as-needed basis to meet state specific data privacy statute requirements. The scope of these State Supplements will be to cite and address any state specific data privacy statutes and their requirements to the extent that they require terms in addition to or different from the National Standard Clauses. The State Supplements will be written in a manner such that they will not be edited/updated by individual parties and will be posted on the SDPC website to provide the authoritative version of the terms. Any changes by LEAs or Providers will be made in amendment form in an Exhibit (Exhibit "H" in this proposed structure).]*

All providers must be in compliance with the following state legislation

**Owasso Public Schools**

Treasurers Report

as of April 30th, 2026

	General Fund prior year 7/1/24 to 4/30/25	General Fund current year 7/1/25 to 4/30/26	Building Fund prior year 7/1/24 to 4/30/25	Building Fund current year 7/1/25 to 4/30/26	Child Nutrition prior year 7/1/24 to 4/30/25	Child Nutrition current year 7/1/25 to 4/30/26	Sinking Fund prior year 7/1/24 to 4/30/25	Sinking Fund current year 7/1/25 to 4/30/26
Beginning Fund Balance	18,444,544.42	20,271,993.58	4,009,841.87	4,281,377.64	2,572,917.00	2,233,404.82	2,035,668.91	5,553,565.30
Revenue								
local	28,039,110.93	29,346,568.75	3,987,364.15	4,165,736.87	1,608,413.80	1,612,989.62	20,166,791.72	22,537,450.81
intermediate	3,471,793.50	3,713,399.89	0.00	0.00		0.00		0.00
state	35,571,571.15	35,257,311.66	631,130.48	526,253.60	18,561.47	18,369.15	15,166.04	1,444.12
federal	3,783,677.19	3,450,069.01	0.00	0.00	1,819,280.62	1,724,165.51		
premium on bond sale							1,504,841.20	0.00
reimb/correcting entry	<u>52,685.75</u>	<u>55,895.42</u>	<u>0.00</u>	<u>0.00</u>	<u>1,014.20</u>	<u>39.00</u>	<u>0.00</u>	<u>0.00</u>
total revenue	<b>70,918,838.52</b>	<b>71,823,244.73</b>	<b>4,618,494.63</b>	<b>4,691,990.47</b>	<b>3,447,270.09</b>	<b>3,355,563.28</b>	<b>21,686,798.96</b>	<b>22,538,894.93</b>
Expenditures								
salary	40,831,081.67	41,708,558.93			1,417,643.26	1,408,015.05	0.00	0.00
benefits	12,964,396.58	13,360,875.83			451,714.77	457,799.41	0.00	0.00
contracted prof / tech svcs	954,593.61	902,919.77	3,520.00	1,305.00	13,539.00	14,060.00	0.00	0.00
property svcs	446,921.59	717,873.64	959,527.74	1,128,340.96	46,934.31	71,645.00	0.00	0.00
other purchased svcs	432,819.97	464,077.89	1,648,669.83	1,504,228.32	1,478,319.02	1,483,288.23	0.00	0.00
supplies	1,289,860.47	1,267,976.66	1,970,238.73	2,021,307.44	64,600.13	32,408.32	0.00	0.00
property	0.00	23,856.51	0.00	0.00	240,282.70	305,926.13	0.00	0.00
dues/fees/registration/tuition	504,167.10	457,976.30			1,339.75	174.75	0.00	0.00
bond principal & interest							1,015,212.50	2,224,220.00
other uses	<u>13,422.25</u>	<u>13,219.15</u>	<u>0.00</u>	<u>0.00</u>	<u>13,514.20</u>	<u>12,510.55</u>	<u>0.00</u>	<u>0.00</u>
total expenditures	<b>57,437,263.24</b>	<b>58,917,334.68</b>	<b>4,581,956.30</b>	<b>4,655,181.72</b>	<b>3,727,887.14</b>	<b>3,785,827.44</b>	<b>1,015,212.50</b>	<b>2,224,220.00</b>
prior year estopped checks	0.00	0.00						
Balance as of April 30th	31,926,119.70	33,177,903.63	4,046,380.20	4,318,186.39	2,292,299.95	1,803,140.66	22,707,255.37	25,868,240.23
bank balance 4-30-26		33,401,972.04		4,423,010.33		1,863,835.12		25,868,240.23
outstanding checks		(224,068.41)		(104,823.94)		(60,694.46)		0.00
balance 4-30-26		33,177,903.63		4,318,186.39		1,803,140.66		25,868,240.23

**Owasso Public Schools  
Treasurers Report**

Bond / Lease Purchase Funds Summary  
as of 4-30-26

	bond 31 year to date	bond 32 year to date	bond 33 year to date	bond 35 year to date	bond 39 year to date	LP 05 year to date
FY 26 Beginning Fund Balance	39,260,027.51	0.00	713.68	38,156.54	176,930.53	0.00
Revenue						
interest/other	907,277.75	92,373.14	0.00	0.00	0.00	1,039,859.55
correcting entry	59,872.00	0.00	0.00	0.00	0.00	0.00
lease purchase proceeds						123,400,364.05
bond proceeds	<u>0.00</u>	<u>7,400,000.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>
total revenue	967,149.75	7,492,373.14	0.00	0.00	0.00	124,440,223.60
Expenditures	<u>12,508,425.00</u>	<u>0.00</u>	<u>713.68</u>	<u>25,545.00</u>	<u>125,360.99</u>	<u>1,201,119.79</u>
Balance as of 4-30-26	27,718,752.26	7,492,373.14	0.00	12,611.54	51,569.54	123,239,103.81

project	description	Bond 39 budget	Bond 39 encumbered	Bond 39 balance	Bond 35 budget	Bond 35 encumbered	Bond 35 balance	Bond 33 budget	Bond 33 encumbered	Bond 33 balance
000	non categorical	59,170.00	59,170.00	0.00	38,156.54	37,845.00	311.54	713.68	713.68	0.00
119	plant operations	51,569.54	3,585.68	47,983.86	0.00	0.00	0.00	0.00	0.00	0.00
120	fine arts uniforms/equip	14,118.44	14,118.44	0.00						
141	5th grade center	<u>52,072.55</u>	<u>52,072.55</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>	<u>0.00</u>
<b>total</b>		<b>176,930.53</b>	<b>128,946.67</b>	<b>47,983.86</b>	<b>38,156.54</b>	<b>37,845.00</b>	<b>311.54</b>	<b>713.68</b>	<b>713.68</b>	<b>0.00</b>

project	description	Bond 31 budget	Bond 31 encumbered	Bond 31 balance	Bond 32 budget	Bond 32 encumbered	Bond 32 balance
000	non categorical	139,384.19	59,872.00	79,512.19	92,373.14	97,037.00	(4,663.86)
010	lease payment						
111	copiers	247,675.00	108,499.00	139,176.00			
112	buses	397,224.76	153,832.80	243,391.96			
113	technology	5,543,328.98	3,558,929.35	1,984,399.63			
114	instructional resources	2,573,259.18	850,158.56	1,723,100.62			
116	athletics uniforms/equip	206,009.71	149,471.40	56,538.31			
117	safety	392,962.88	161,666.18	231,296.70			
119	plant operations	4,680,410.77	1,755,970.03	2,924,440.74			
120	fine arts uniforms/equip	640,036.29	166,767.92	473,268.37			
171	nurses equipment	50,948.91	46,979.01	3,969.90			
172	library budgets	<u>179,420.46</u>	<u>167,657.73</u>	<u>11,762.73</u>			
	Total Annual Budgets	15,050,661.13	7,179,803.98	7,870,857.15			
	<u>Construction Projects</u>						
134	roofing district wide		3,533,897.67				
136	track/band project		225,631.33				
138	hodson safe structure		2,834,126.86				
139	8th Grade Safe Room		10,672,413.15		7,400,000.00	7,305,266.00	94,734.00
141	5th grade center		778,356.91				
142	transportation facility		<u>433,037.00</u>				
	Total Construction	<u>18,773,052.61</u>	<u>18,477,462.92</u>	<u>295,589.69</u>			
<b>total</b>		<b>33,823,713.74</b>	<b>25,657,266.90</b>	<b>8,166,446.84</b>	<b>7,492,373.14</b>	<b>7,402,303.00</b>	<b>90,070.14</b>

## Owasso Public Schools

Lease Purchase Report

Report Date 4-30-2026

Project Code	Description	Budget	Encumbered	Unencumbered Balance
101	site allocation furniture/equipment	510,000.00	45,418.30	464,581.70
103	fine arts addition hs west campus	17,542,152.00	1,030,000.00	16,512,152.00
104	hs east campus renovations	10,100,000.00	73,793.00	10,026,207.00
105	7th grade safe structure / multisports complex	17,967,820.00	1,233,564.00	16,734,256.00
106	prek furniture/instructional equipment	1,030,000.00		1,030,000.00
107	tennis court resurface	650,000.00	561,344.00	88,656.00
109	playground equipment	450,000.00		450,000.00
110	transition program room remodel	260,000.00		260,000.00
115	ram academy science room remodel/furniture	185,750.00		185,750.00
118	performing arts center upgrades	135,000.00		135,000.00
119	plant operations	31,500.00		31,500.00
122	art room remodels	134,838.00		134,838.00
123	ag fence	80,000.00	50,635.00	29,365.00
126	turf replacement	1,650,000.00	583,600.00	1,066,400.00
134	roofing district wide	8,000,000.00	1,541,674.00	6,458,326.00
139	8th grade safe structure	363,000.00	239,000.00	124,000.00
141	5th grade center	<u>57,134,275.00</u>	<u>7,307,899.00</u>	<u>49,826,376.00</u>
	Total	<b>116,224,335.00</b>	<b>12,666,927.30</b>	<b>103,557,407.70</b>

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**MEMORANDUM**

Date: April 6, 2026  
To: Plan Sponsor, Owasso Public Schools  
From: Mark Lester, General Counsel  
Re: Cycle 2 403(b) Plan Restatement Period

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**Background and Legal Authority**

Pursuant to Internal Revenue Services (“IRS”) Notice 2022-8<sup>1</sup>, a cumulative list has been provided that identifies changes to Section 403(b) of the Code. These changes must be adopted by Plan Sponsors of 403(b) plans prior to **December 31, 2026**. The cumulative list includes legislative changes contained in various congressional acts, including Setting Every Community Up for Retirement Enhancement (SECURE) Act and the Coronavirus Aid, Relief, and Economic Security (CARES) Act. In addition, in accordance with Revenue Procedure 2023-37 an Interim Amendment covering the SECURE 2.0 Act must also be adopted prior to **December 31, 2026**. The discretionary or allowable changes are significant due to the aggressive legislation adopted by the Congress of the United States since the formulation of the last cumulative list in 2018.

**Required Action**

On the following pages we have attempted to provide relevant information without overwhelming you with particulars. That said, the restatement period is a great time to make changes to the Plan and to ensure the Plan addresses current retirement plan objectives. If during your review you decide to change any of the plan’s current provisions or the contents of the Interim Amendment, please contact Lindsay Kyle or me. We will be happy to discuss any discretionary changes you may like to consider.

To streamline the process, documents related to the restatement of the Plan are provided in three (3) parts:

- **Exhibit A – Necessary Documents.** Exhibit A contains documents that require your consideration and review. Final versions of the documents will be sent in electronic form for your signature.
- **Exhibit B – Optional Documents.** Exhibit B contains documents that you may elect to incorporate as part of the Plan’s administration. The documents contained in Exhibit B are not mandatory.
- **Exhibit C – Authorizing Documents.** Exhibit C contains the documents and agreements authorizing the Plan restatement and ongoing third-party administrative services. Also included in Exhibit C is a service agreement for the corresponding 457(b) plan that was previously restated in the last quarter of 2025.

**Costs**

The restatement process falls under the “extraordinary services” provision of our service agreement. Pursuant to such agreement, extraordinary services are not performed without the consent of the plan sponsor. Our fee for the restatement is **\$975.00**. The effective date of the restated plan documents will be July 1, 2026. To expedite the restatement process, please review, sign (as necessary) and return the following forms no later than **May 31, 2026**.

As always, we appreciate the opportunity to serve you and provide administrative services to the Plan.

Sincerely,



Mark Lester, JD, QKA

Enclosures

c: Holli Taylor, Financial Advisor

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<sup>1</sup> 2022 Cumulative list also provides 2022-7 Internal Revenue Bulletin (IRB) 491, and certain other requirements of IRC Section 403(b) as detailed in Section 13 of Revenue Procedure (Rev. Proc.) 2021-37, 2021-38 IRB 385.

## **FORM OF RESOLUTION**

### **A RESOLUTION OF THE BOARD OF EDUCATION OF INDEPENDENT SCHOOL DISTRICT NO. ELEVEN, TULSA COUNTY, OKLAHOMA APPROVING AND ADOPTING THE RESTATED OWASSO PUBLIC SCHOOLS 457 DEFERRED COMPENSATION PLAN AND APPROVING CERTAIN SERVICE AGREEMENTS FOR THE CONTINUING ADMINISTRATION OF THE PLAN**

**WHEREAS**, the professional staff of Independent School District No. Eleven, Tulsa County, Oklahoma (commonly referred to as Owasso Public Schools and hereinafter referred to as “Employer”) has reviewed the Owasso Public Schools 457 Deferred Compensation Plan (“Plan”) restatement documents and recommends the Owasso Public Schools Board of Education’s (“Board”) approval; and

**WHEREAS**, the Board previously approved and adopted the Plan in accordance with 26 U.S. Code 457 for the benefit of the Employer’s eligible employees; and

**WHEREAS**, for the purpose of ensuring the Plan complies with applicable law, it has become necessary to restate the Plan to provide for the authorizations and provisions of certain federal law, including, but not limited to, Setting Every Community Up for Retirement Enhancement Act of 2019 (“SECURE Act”), Coronavirus Aid, Relief, and Economic Security Act (“CARES Act”), and Setting Every Community Up for Retirement Enhancement 2.0 Act of 2022 (“SECURE 2.0 Act”); and

**WHEREAS**, it is further recommended that the appointment of Phillip Storm, Chief Financial Officer (“CFO”) as Trustee and authorized representative of the Plan for the Employer be confirmed during the restatement Plan; and

**WHEREAS**, it remains in the best interest of the Employer to continue to serve as the administrator of the Plan and be responsible for performing all actions necessary to carry out the administration of the Plan, including the designation of any other persons to perform the actions necessary to properly administer the Plan; and

**WHEREAS**, it is in the best interest of the Employer and its employees to engage the services of Pension Solutions, Inc., and authorize CFO to execute such services agreements and fee schedules as necessary and appropriate.

**WHEREAS**, to facilitate the implementation and administration of the Plan, the CFO and those employees designated by the CFO should continue to be authorized to carry out the implementation and administration of the Plan, communicate the provisions of the Plan to the employees of Owasso Public Schools, and to take such actions as necessary to carry out the Plan in accordance with applicable law, the terms of the Plan and the services agreements contemplated herein.

## **FORM OF RESOLUTION**

**NOW, THEREFORE, BE IT RESOLVED BY THE OWASSO PUBLIC SCHOOLS, THAT:**

1. The Owasso Public Schools Board hereby approves and adopts the restatement of Owasso Public Schools 457 Deferred Compensation Plan for the benefit of the eligible employees of the Employer to be effective July 1, 2026.
2. The Board authorizes the execution of the restated Plan documents and authorizes the performance of any other actions necessary to implement the restatement of the Plan by the CFO, and as may be appropriate the CFO may designate member(s) of the Board or employee(s) of Broken Arrow Public Schools to perform such actions as necessary to restate the Plan with the exception of executing the Plan document(s). A copy of the Plan shall be retained in the business office of the Employer.
3. The Employer's CFO and employees designated by the CFO are authorized to implement the provisions of the Plan, communicate the provisions of the Plan with the employees of Owasso Public Schools, and take such actions as necessary to carry out the Plan in accordance with applicable law, the terms of the Plan, and the service agreements between the Employer and Pension Solutions, Inc., and/or their successors.
4. The Board reserves the right to appoint and/or rescind the appointment of any Trustee and to designate and/or terminate the designation of any person selected to perform certain actions of administration on behalf of the Plan Administrator.
5. The Board hereby appoints Phillip Storm to serve as Trustee of the Plan, and designates the Employer to serve as Plan Administrator, which duties and actions shall be carried out by the CFO, or successor, in accordance with the authorizations stated herein.
6. The Board authorizes the Plan Administrator to perform all actions necessary to carry out the administration of the Plan and reserves the right to designate other persons other than the Employer's CFO as may be appropriate to perform the actions necessary to administer the Plan.
7. The attached service agreement and fee schedules by and between the Employer and Pension Solutions, Inc. are hereby approved and the Employer's CFO is authorized to finalize and execute such service agreement and fee schedules.

**PASSED AND APPROVED** at a regular meeting of the Owasso Public Schools Board of Education this \_\_\_\_\_ day of \_\_\_\_\_ 2026.

## AGREEMENT FOR ADMINISTRATIVE SERVICES

**THIS AGREEMENT FOR ADMINISTRATIVE SERVICES** and the attached Fee Schedule Addendum are entered into as of July 1, 2026 (“Effective Date”) by and between Pension Solutions, Inc., an Oklahoma corporation (“PSI”) and Independent School District Number Eleven, Tulsa County, Oklahoma d/b/a Owasso Public Schools, an independent school district operating in the state of Oklahoma in accordance with the Oklahoma School Code, 70 O.S. § 1-101 *et. seq.* (the “District”). (Hereinafter, this Agreement for Administrative Services and the Fee Schedule Addendum shall be collectively referred to as the “Agreement” and reference to the Fee Schedule Addendum specifically shall be referred to as the “Addendum.”)

**WHEREAS**, pursuant to a duly adopted resolution of the Board of Education for Independent School District Number Eleven, Tulsa County, Oklahoma, (“Board” the governing body of the District), the District has approved the adoption and subsequent restatement(s) of the Owasso Public Schools 457 Deferred Compensation Plan (the “Plan”), which Plan was adopted in accordance with applicable law; and

**WHEREAS**, in accordance with the adopting resolution, the District is the Plan Sponsor of the Plan and appointed itself the Plan Administrator of the Plan and as such is responsible for performing all actions necessary to carry out the administration of the Plan in accordance with applicable law, including express limitations regarding the performance of certain duties; and

**WHEREAS**, the District has named and appointed Phillip Storm as the fiduciary and trustee of the Plan (hereinafter referred to as the “Trustee”), which appointment may be rescinded at any time by the Board. Immediately upon separation of employment, Phillip Storm’s appointment as trustee, as well as all rights and obligations shall terminate and become vested in the Board unless a successor trustee has been named; and

**WHEREAS**, the Board is a beneficiary of this Agreement and hereby agrees to ensure the performance of the District as Plan Administrator and its obligations, responsibilities and duties contained in this Agreement and to hold PSI harmless for any failure of the Plan Administrator to perform its duties and responsibilities in accordance with this Agreement as amended from time to time; and

**WHEREAS**, the Plan Administrator desires to engage PSI to perform certain third-party administrative services for the Plan and PSI agrees to perform certain administrative services for the Plan in accordance with this Agreement and applicable law; and

**WHEREAS**, as applicable, this Agreement serves to satisfy the disclosure requirements of applicable law.

**NOW THEREFORE**, the Board, the District (as Plan Sponsor and Plan Administrator), and PSI agree as follows:

### **1. Scope of Services**

PSI agrees to perform the administrative services and only those services set forth in this Agreement (the "Services"). PSI is not responsible for any services rendered, or to be rendered, on behalf of the Plan by any party prior to the date of this Agreement, or for any services that PSI has not specifically agreed to perform on behalf of the Plan. Pursuant to this Agreement, PSI is serving as a limited third-party administrator for the Plan. PSI is not the Plan Administrator and is not a fiduciary with respect to the Plan. The District specifically acknowledges that PSI provides no investment advice whatsoever, and has no authority, discretionary or otherwise, over Plan assets or administrative decisions.

### **2. Fees**

The District agrees to pay PSI the administration fees and other fees for the Services rendered through the date of termination of this Agreement in accordance with the Addendum. In addition to the fees set forth in this Agreement, the District agrees to pay PSI for any services performed by PSI that are in addition to the Services expressly stated in this Agreement, if such services are requested by the Plan Administrator, pursuant to the provisions of the Addendum, "Extraordinary Services," or pursuant to an agreement for additional services outside the scope of this Agreement, which may be entered into by the District and PSI for mutually agreed upon fees and costs.

The District acknowledges that PSI may also receive compensation indirectly ("Indirect Compensation") from sources other than the District or from Plan assets in connection with the Services as described in the Addendum. Any Indirect Compensation received by PSI shall be in addition to and separate from the fees payable pursuant to the Addendum. PSI represents that it will not receive any compensation, direct or indirect, for the Services provided in accordance with this Agreement, except for Indirect Compensation as defined and disclosed herein and the fees disclosed on the Addendum. In addition to continuing monthly, quarterly, semi-annual, or annual fees referenced on the Addendum, PSI will invoice associated fees and costs for the Services after such Services are completed. Payment of invoices should be received by PSI within thirty (30) days of the invoice date. If payment is not received in full within thirty (30) days, PSI reserves the right to impose late fees in accordance with the Addendum and deduct such late fees and any amounts owed from the Plan assets.

### **3. Term**

This Agreement is effective from July 1, 2026, to June 30, 2027, for an annual term. Subsequent annual renewals must be approved by the Board in accordance with applicable state law. Either party may terminate this Agreement upon written notice in accordance with Section 9(f) of this Agreement. PSI shall not be responsible for the performance of the Services, including the maintaining of the Plan Administrator's files after the date this Agreement is terminated.

## **1. Confidentiality**

PSI and the District may disclose certain business, financial, technical, intellectual property, materials, data, and other information to each other. All such non-public information that has been identified or otherwise designated as confidential or proprietary information or that is otherwise subject to safeguards or protection under applicable law shall be considered "Confidential Information." The receiving party shall use Confidential Information solely for the purposes of rendering the Services pursuant to and in accordance with this Agreement and shall not, without the prior written consent of the other party, disclose any Confidential Information to any third party, except as may be disclosed as required by law, regulation, order of a court of competent jurisdiction or regulatory authority with subject matter jurisdiction. Nothing in this Agreement is intended to grant any rights to either party under any patent, copyright, trademark, service mark, or other intellectual property of the other party, except for the use of Confidential Information that is expressly permitted herein. PSI and the District acknowledge that any disclosure or unauthorized use of Confidential Information will constitute a material breach of this Agreement and cause substantial harm to the party that provided such Confidential Information initially for which damages would not be a fully adequate remedy.

## **2. Timeliness of Data**

Timely processing of information is essential to the proper administration of the Plan and avoids costly adverse consequences with regard to government oversight and compliance. The District will provide the information requested by PSI within fifteen (15) days after unless specifically stated otherwise or required by governing law.

## **3. Responsibilities of Plan Administrator**

- (a) The District represents that in accordance with applicable law, it has delegated the control and management of the assets of the Plan, including, but not necessarily limited to, the selection and monitoring of service providers for the Plan, interpretation of Plan provisions, evaluation of claims made by participants, eligibility of participants, selection of any qualified default investment alternative, and all other plan administrator responsibilities. The District may elect to have certain fees for the Services deducted from Plan assets, and it is the responsibility of the District to determine whether Plan assets may be used to pay any fee. The District further represents that an unsigned copy of this Agreement and the Addendum serves as a disclosure of certain fees as of the date this Agreement was provided to the Plan Administrator. Furthermore, the District acknowledges that such fees may change from time to time.
- (b) The District will provide PSI with requested information on a timely basis. PSI will rely on information provided by the District or its representatives, including third-parties, and will have no responsibility to independently verify the accuracy of the information. PSI assumes no responsibility to acquire information other than to request it from the District and will not be liable for any errors or omissions made as a result of incomplete or incorrect information provided by the Plan Administrator. Additional services that need to be performed or revised due to incomplete or inaccurate data furnished by or on behalf of the Plan or the District will be subject to additional fees. Information and data requested by PSI shall be provided by the District or its agents within thirty (30) days or by the date referenced in PSI's request for information or as required by governing law.

The District will be responsible for all consequences, including but not limited to, penalties and/or sanctions imposed by the Internal Revenue Service (“IRS”), the United States Department of Labor (“DOL”), and any other local, state or federal governing authority.

- (c) As applicable, the District is responsible for ensuring that funds are actually and properly contributed to the Plan’s custodial account and/or to Plan participants’ individual custodial accounts as required:
- for tax deductibility; and
  - to satisfy applicable minimum funding standards for pension plans; and
  - to ensure employee deferrals and loan payments are deposited within the time parameters required by the DOL and applicable law.

PSI has no obligation to monitor Plan contributions or to ensure that such contributions or loan payments are timely contributed to the Plan’s custodial account and/or to Plan participants’ individual custodial accounts.

- (d) Fees, costs, charges, additional contributions, refunds of employee deferrals, or any other penalties imposed by a governmental agency having jurisdiction over the Plan, are the sole responsibility of the Plan and the Plan Administrator. In accordance with the fees and costs referenced on the Addendum, PSI may be engaged to represent the Plan during an examination conducted by any governmental agency having jurisdiction over the Plan, including, but not limited to the IRS and DOL.
- (e) The District will be responsible for providing the notices and information required by law to Plan participants, including, without limitation, notices and distribution forms, as well as obtaining applicable signatures on distribution forms.
- (f) The District will be responsible for ensuring PSI is authorized to conduct business on behalf of the District for the Services provided herein and shall promptly execute such forms of the Custodians (as defined below) and PSI, as are necessary and appropriate.
- (g) The District shall provide PSI a census of all Plan participants within thirty (30) days of the end of the District’s fiscal year. Such census information shall include: each participant’s first and last name; each participant’s social security number; and, each participant’s date of birth, date of hire, and as applicable the date of separation from employment (“Census Information”). For the purpose of this paragraph, all Plan participants means, all employees or prior employees with plan assets maintained by an active custodial investment arrangement according to the Plan Adoption Agreement and/or inactive investment arrangements maintained by grandfathered recordkeepers, custodians, or annuity providers. In addition, the District is to provide PSI Census Information regarding all new enrollees in the Plan.
- (h) Due to the Plan’s inactive investment arrangements maintained by grandfathered recordkeepers, custodians, and annuity providers, it is important that the District provide a plan participant’s phone number and email address along with the completion of any necessary forms. The District acknowledges that in order to expedite a participant’s request, PSI may communicate directly with the Plan participant.

- (i) The Plan's operation and tax qualification is affected by other plans sponsored by the District. Other entities owned/operated by the District or governed by the Board may also affect the Plan. The District is responsible for informing PSI of other potentially related plans or entities (including controlled groups and affiliated service groups), and any change in such information.

#### **4. Administrative Services**

The following sets forth the Services to be performed by PSI under the terms and conditions of this Agreement:

- (a) Takeover/Installation services for transition to PSI, including review of plan provisions, compliance review with the Custodians, and completion of installation forms and documents.
- (b) Assistance with conversion of plan assets from another service provider (if applicable).
- (c) Perform data requests and analysis of census data from Custodians and/or Plan Administrator.
- (d) Assistance in the Plan Administrator's determination of participant eligibility, vesting and eligibility to receive employer contributions.
- (e) Interface with custodial websites of active investment arrangements to facilitate administration and benefit payments.
- (f) Serve as an authorized third-party signatory to facilitate benefit payments with inactive investment arrangements maintained by grandfathered recordkeepers, custodians, and/or annuity providers, as necessary and appropriate.
- (g) Serve as authorized third-party signatory to facilitate in-service transfers of Plan participants' funds with inactive investment arrangements maintained by grandfathered recordkeepers, custodians, and/or annuity providers to Custodians, as necessary and appropriate.
- (h) Routine calls and inquiries relating to the Services.
- (i) Assisting with Plan participant communication materials.
- (j) One (1) semi-annual meeting with the District and such additional meetings as reasonably necessary in connection with the Services at rates contained in the Addendum.

#### **5. Limitation on Liability and Indemnity Provisions**

- (a) General. District agrees that the only responsibilities of PSI hereunder are to render the Services provided in this Agreement. In no event shall PSI be responsible for delays or failures in the performance of its duties that are caused by or result from acts of God, epidemic, war, acts of terrorism, computer viruses, governmental interference, fire or other casualty, software or hardware malfunction, communication line failure, power failure, acts or omission by the District or any other circumstances beyond the control of

PSI. The Board agrees to ensure the performance of the District's obligations, responsibilities and duties contained in this Agreement (through its Designee or otherwise), including the payment of fees and costs, and, to hold PSI harmless for any failure of the District to perform its duties and responsibilities in accordance with this Agreement as amended from time to time.

- (b) Payment for Response to Subpoenas and Document Production Requests. In the event that PSI and/or any of its employees, officers, directors or agents receive a subpoena to provide testimony, or to produce documents, in connection with any judicial or quasi-judicial proceeding, relative to services provided by PSI pursuant to this Agreement, the District agrees to pay PSI an amount equal to the actual out of pocket expenses associated with producing said documents and/or appearing at said proceeding, and to pay to PSI an hourly fee for all time incurred by PSI personnel or its agents in preparing for and appearing at said proceeding, and for preparing documents to be produced, pursuant to the Addendum, "Extraordinary Services."
- (c) Non-representation. PSI is not a tax advisor; nor, the Plan Administrator. PSI will make recommendations to the District and Designee; however, in no way should such recommendations be relied upon in lieu of advice and counsel from the Plan's certified public accountant and/or licensed attorney.

## 6. General Provisions

- (a) Amendment. This Agreement may not be modified or amended except in writing signed by the parties. PSI shall communicate any proposed modification or amendment to the District not less than sixty (60) days prior to the effective date of the proposed modification or amendment. If the District objects to any such modification or amendment, it may exercise its termination rights under Section 3 of this Agreement.
- (b) Communications. The exchange of information between the parties regarding the implementation and administration of the Plan may be effectuated via the parties' designated email addresses or PSI's client portal. If the District elects not to exchange information by email or through the client portal, the District may be billed for the delivery of hardcopy documents according to the Addendum. Except as required in accordance with Section 9(e) - Event of Default, PSI may elect to deliver invoices, past due information, and other related items via email or through the client portal.
- (c) Interpretation. This Agreement is not assignable by either party hereto without the prior written consent of the other party. Section and other headings are for reference only and shall not affect the meaning or interpretation of this Agreement. This Agreement is binding upon and shall inure to the benefit of the parties and their respective heirs, successors, survivors, administrators and assigns. This Agreement constitutes and contains the entire understanding between the parties and supersedes all prior oral or written statements dealing with the subject matter herein.
- (d) Severability. If any one or more of the provisions of this Agreement shall, for any reason, be illegal or invalid, such illegality or invalidity shall not affect any other provision of this Agreement and this Agreement shall be enforced as if such illegal or invalid provision had not been contained herein. This Agreement may be executed in multiple counterparts,

each of which shall be deemed an original and all of which taken together shall constitute one and the same Agreement.

(e) Event of Default. An Event of Default shall occur if any party fails to perform its responsibilities, duties, and obligations contained in this Agreement and such Event of Default is not remedied within sixty (60) days upon delivery of written notice by the injured party to the offending party in accordance with the notice requirements contained in this Agreement. Notice of an Event of Default by electronic means shall be deemed non-delivered. Written notice of an Event of Default by an injured party must include the following:

- i. The Event of Default being alleged by the injured party; and
- ii. The date the Event of Default occurred; and
- iii. The date the injured party discovered the Event of Default; and
- iv. Evidence supporting each alleged Event of Default stated in the written notice; and
- v. The total actual damages sought, including, relief of the offending party to perform certain responsibilities or duties contained in this Agreement; and
- vi. The date the alleged Event of Default must be remedied by the offending party, which date shall not be less than sixty (60) days from the delivery of the written notice.

(f) Notice. Any and all notices required or permitted under this Agreement between the parties hereto shall be sufficient in all respects if: (i) reduced to writing; and, (ii) provided to the other party or parties not less than thirty (30) days prior to the effective date of the notification. Delivery of any notice is effective if:

- (i) delivered personally; or
- (ii) mailed by registered or certified mail, return receipt requested and postage prepaid; or
- (iii) delivered via a nationally recognized overnight courier service.

Delivery shall be made to the addresses set forth in this Agreement under the signatures of the parties or to such other address as either party may designate in writing to the other pursuant to Section 9(b) above.

(g) The District acknowledges that its employees consent to the storage and delivery of Personally Identifiable Information (“PII”) when voluntarily electing to participate in the Plan. The District acknowledges and authorizes the electronic exchange of PII for the purpose of implementing and administering the Plan. Further, the District acknowledges that PSI has access to its employees’ PII, and that in executing its duties under this Agreement, PSI must frequently acquire and exchange PII. The District recognizes that the acquisition and exchange of PII is generally performed through electronic means, including software operated in full or in part by Artificial Intelligence. The District shall hold PSI harmless for any unauthorized release of PII, plus any ensuing damages or losses experienced by an employee due to an unauthorized release or disclosure of PII unless there is an adjudicated finding of gross negligence or willful misconduct on the part of PSI.

For the purposes of this Agreement PII shall mean:

- a. Complete date of birth without redaction
  - b. Combination of first and last names or first initial and last name
  - c. Participant/ employee address that includes street number (P.O. Box), city, and zip code
  - d. Full nine (9) digit social security number without any redaction
- (h) For an unauthorized release or disclosure of PII to occur, PSI's actions must be unrelated or outside the scope of its duties under this Agreement. In addition, a combination of not less than three (3) of the above enumerated items must be released or disclosed within a single electronic exchange of information. The District acknowledges and authorizes the electronic exchange of information including PII in the course of implementing and administering the Plan.
- (i) Arbitration. If this Agreement is breached or a party fails to perform its responsibilities, duties, and obligations contained herein and such breach or default is not cured and the injured party is not made whole within sixty (60) days upon delivery of written notice as provided herein, then such injured party may seek a settlement and remedies for damages by initiating a proceeding to arbitrate the matter pursuant to the rules and standards of the American Arbitration Association with such proceeding occurring in Oklahoma City, Oklahoma County, Oklahoma. The parties to this Agreement mutually agree as follows regarding the settlement of any dispute or damages through arbitration:
- i. The injured party must have provided the opposing party written notice of the claimed default, damages, and the requested remedy within no less than sixty (60) days from the delivery of such written notice for the opposing party to cure such default and make acceptable restitution.
  - ii. Each party shall pay for its own costs and expenses incurred to arbitrate any dispute among the parties.
  - iii. The arbitration shall be final and binding on all parties.
  - iv. Judgment of an arbitrator's award may only be entered in a court having jurisdiction pursuant to this Agreement.
  - v. The parties waive their right to a jury trial.
  - vi. The arbitrator's award is not required to include factual findings or legal reasoning.
  - vii. Any party's right to appeal or seek modification of an arbitrator's award is strictly limited.
  - viii. The panel of arbitrators selected to arbitrate a settlement will typically include a minority of arbitrators who are familiar or affiliated with the retirement plan administration industry.
  - ix. By law, an arbitration agreement does not preclude a party from seeking settlement of a dispute and/or remedies for damages in small claims court.
- (j) Governing Law and Forum Selection. Except for the application of Section 9(e) above, this Agreement shall be governed by and construed according to the laws of the State of Oklahoma, without reference to conflict of law principles, except federal law preempts state law. The exclusive forum for any dispute between the Board, the District, and PSI that arises out of or relates to this Agreement shall be a court of competent jurisdiction in Oklahoma County, Oklahoma.

(k) Disclosures. The disclosures set forth in this Agreement constitute all of the disclosures required to be made by PSI pursuant to the provisions of 29 C.F.R. §2550.408b-2(c), regardless of whether this document is signed on behalf of the District, or the Plan fails to satisfy the definition of “covered” as defined by 29 C.F.R. §2550.408b-2. In addition, as required by law or otherwise, this Agreement serves as notice and satisfaction of any fee disclosures to be provided by PSI to the District in its capacity as a limited Plan fiduciary.

**IN WITNESS WHEREOF**, the parties hereto, by their duly authorized representatives, have caused this Agreement to be executed and effective the date first written above.

[SIGNATURE PAGE FOLLOWS]

PSI:

Pension Solutions, Inc.  
9116 North Kelley Avenue  
Oklahoma City, OK 73131



By: \_\_\_\_\_  
Geoffrey O. Stallings, President

Board of Education:

Independent School District Number Tulsa, Tulsa  
County, Oklahoma d/b/a Owasso Public Schools  
1501 North Ash Street  
Owasso, OK 74055

By: X \_\_\_\_\_  
\_\_\_\_\_, Board of Education President

District:  
(Plan Sponsor and Plan Administrator)

By: X \_\_\_\_\_  
Phillip Storm, Chief Financial Officer

## LIMITED SERVICE AGREEMENT FOR RESTATEMENT OF THE Owasso Public Schools 457 Deferred Compensation Plan

**THIS LIMITED SERVICE AGREEMENT** (the “Agreement”) is entered into by and between Pension Solutions, Inc., an Oklahoma corporation (“PSI”) and Owasso Public Schools, an independent school district operating in the state of Oklahoma in accordance with the Oklahoma School Code, 70 O.S. § 1-101 *et. seq.* (“Plan Sponsor”).


The Plan Sponsor maintains the Owasso Public Schools 457 Deferred Compensation Plan (the “Plan”), a supplemental 457(b) retirement plan for the benefit of its employees. Due to significant legislation in recent years, including Congress passing the Setting Every Community Up for Retirement Enhancement (SECURE) Act and the Coronavirus Aid, Relief, and Economic Security (CARES) Act and other applicable guidance, the Plan document provider has revised the Plan documents in order to appropriately collate and incorporate applicable legislative provisions.

PSI has provided Plan Sponsor with the restated document provider for execution prior to December 31, 2025, according to the fees provided in Table I below.

TABLE I – LIMITED ADMINISTRATIVE SERVICES	
ADMINISTRATIVE SERVICES	COSTS/FEEES
The restatement of the Plan to incorporate and collate various provisions of federal legislation including applicable portions of the Setting Every Community Up for Retirement Enhancement (SECURE) Act and the Coronavirus Aid, Relief, and Economic Security (CARES) Act.	\$295.00
OPTIONAL SERVICES	
<p>_____ By initialing this line, I am electing to opt-out of electronic delivery and signing of the restatement documents. I acknowledge and understand that a fee of \$45.00 will be charged for the preparation and processing of documents for delivery via the USPS or private delivery service.</p>	

Plan Sponsor: **Owasso Public Schools**

By:

X 

4-9-26

\_\_\_\_\_ Date

PHILIP STORM CHIEF FINANCIAL OFFICER

Please Print Name and Title

PSI: Pension Solutions, Inc. **Owasso Public Schools**

By:

X 

April 6, 2026

\_\_\_\_\_ Date

Geoff Stallings

**Please Complete and Return this Page to Pension Solutions.**

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**MEMORANDUM**

Date: April 6, 2026  
To: Plan Sponsor, Owasso Public Schools  
From: Mark Lester, General Counsel  
Re: Cycle 2 403(b) Plan Restatement Period

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**Background and Legal Authority**

Pursuant to Internal Revenue Services (“IRS”) Notice 2022-8<sup>1</sup>, a cumulative list has been provided that identifies changes to Section 403(b) of the Code. These changes must be adopted by Plan Sponsors of 403(b) plans prior to **December 31, 2026**. The cumulative list includes legislative changes contained in various congressional acts, including Setting Every Community Up for Retirement Enhancement (SECURE) Act and the Coronavirus Aid, Relief, and Economic Security (CARES) Act. In addition, in accordance with Revenue Procedure 2023-37 an Interim Amendment covering the SECURE 2.0 Act must also be adopted prior to **December 31, 2026**. The discretionary or allowable changes are significant due to the aggressive legislation adopted by the Congress of the United States since the formulation of the last cumulative list in 2018.

**Required Action**

On the following pages we have attempted to provide relevant information without overwhelming you with particulars. That said, the restatement period is a great time to make changes to the Plan and to ensure the Plan addresses current retirement plan objectives. If during your review you decide to change any of the plan’s current provisions or the contents of the Interim Amendment, please contact Lindsay Kyle or me. We will be happy to discuss any discretionary changes you may like to consider.

To streamline the process, documents related to the restatement of the Plan are provided in three (3) parts:

- **Exhibit A – Necessary Documents**. Exhibit A contains documents that require your consideration and review. Final versions of the documents will be sent in electronic form for your signature.
- **Exhibit B – Optional Documents**. Exhibit B contains documents that you may elect to incorporate as part of the Plan’s administration. The documents contained in Exhibit B are not mandatory.
- **Exhibit C – Authorizing Documents**. Exhibit C contains the documents and agreements authorizing the Plan restatement and ongoing third-party administrative services. Also included in Exhibit C is a service agreement for the corresponding 457(b) plan that was previously restated in the last quarter of 2025.

**Costs**

The restatement process falls under the “extraordinary services” provision of our service agreement. Pursuant to such agreement, extraordinary services are not performed without the consent of the plan sponsor. Our fee for the restatement is **\$975.00**. The effective date of the restated plan documents will be July 1, 2026. To expedite the restatement process, please review, sign (as necessary) and return the following forms no later than **May 31, 2026**.

As always, we appreciate the opportunity to serve you and provide administrative services to the Plan.

Sincerely,



Mark Lester, JD, QKA

Enclosures

c: Holli Taylor, Financial Advisor

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<sup>1</sup> 2022 Cumulative list also provides 2022-7 Internal Revenue Bulletin (IRB) 491, and certain other requirements of IRC Section 403(b) as detailed in Section 13 of Revenue Procedure (Rev. Proc.) 2021-37, 2021-38 IRB 385.

## **FORM OF RESOLUTION**

### **A RESOLUTION OF THE BOARD OF EDUCATION OF INDEPENDENT SCHOOL DISTRICT NO. ELEVEN, TULSA COUNTY, OKLAHOMA APPROVING AND ADOPTING THE RESTATEMENT OF THE OWASSO PUBLIC SCHOOLS 403B PLAN (“PLAN”) AND APPROVING CERTAIN SERVICE AGREEMENTS FOR THE CONTINUING ADMINISTRATION OF THE PLAN**

**WHEREAS**, previously, based on the recommendation of the professional staff of Independent School District No. Eleven, Tulsa County, Oklahoma, (commonly referred to as Owasso Public Schools and hereinafter referred to as “Employer”) the Board of Education of Owasso Public Schools (“Board”) approved the benefits and costs associated with the Owasso Public Schools 403b Plan (“Plan”); and

**WHEREAS**, pursuant to applicable law, the Plan must be restated every six (6) years to ensure plan compliance with new laws and regulations. In this regard, the Internal Revenue Service (“IRS”) has issued Notice 2022-8, providing a cumulative list that identifies changes to Section 403(b) of the Code that must be adopted by Plan Sponsors of 403(b) plans prior to December 31, 2026.

**WHEREAS**, the cumulative list includes legislative changes contained in various congressional acts, including Setting Every Community Up for Retirement Enhancement (SECURE) Act and the Coronavirus Aid, Relief, and Economic Security (CARES) Act.

**WHEREAS**, in addition to the cumulative list, Revenue Procedure 2023-37 provides for an Interim Plan Amendment covering the applicable provisions of the SECURE 2.0 Act, which must also be adopted prior to December 31, 2026.

**WHEREAS**, in order to facilitate the Plan Restatement and adoption of the Interim Plan Amendment, it is recommended that the Employer approve a Limited Service Agreement with Pension Solutions, Inc. for the restatement of the Plan by December 31, 2026, as well as renew the Administrative Service Agreement with Pension Solutions, Inc. for the ongoing third-party plan administration, implementation, support, and compliance services; and

**WHEREAS**, the cost associated with the Plan Restatement and the Interim Plan Amendment is \$975.00, with the participant transaction fees for withdrawals after the Plan Restatement increasing to \$75.00 from \$50.00 per transaction.

## **FORM OF RESOLUTION**

**WHEREAS**, the Board has previously determined it is in the best interest of the Employer to appoint Phillip Storm, Chief Financial Officer (“CFO”), or his respective successors to serve as authorized representatives of the Plan and to be responsible for performing all actions necessary to carry out the implementation and administration of the Plan, including the Plan Restatement; and

**WHEREAS**, it is in the best interest of the Employer to authorize the CFO to designate other employees, persons, and/or entities to perform the actions necessary to properly implement and administer the Plan and to negotiate and enter into service agreements as necessary and appropriate to support the Plan; and

**WHEREAS**, to facilitate the implementation of the Plan, the Board should further authorize the CFO and those employees, persons and/or entities designated by the CFO to implement and administer the Plan, communicate the provisions of the Plan to the employees of Owasso Public Schools, and to take such actions as necessary to carry out the Plan in accordance with applicable law, the terms of the Plan, and the service agreement(s) contemplated herein.

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF EDUCATION OF INDEPENDENT SCHOOL DISTRICT NO. ELEVEN, TULSA COUNTY, OKLAHOMA, THAT:**

1. The Board approves the Plan Restatement in accordance with the cumulative list and applicable law and authorizes the implementation of the Plan Restatement prior to December 31, 2026.
2. The Board approves the adoption of an Interim Plan Amendment in accordance with Revenue Procedure 2023-37 to ensure the Plan complies with the applicable provisions of the SECURE 2.0 Act.
3. The CFO and employees, persons, and/or entities designated by the CFO are authorized to implement the provisions of the Plan, communicate the provisions of the Plan with the employees of Owasso Public Schools, and take such actions as necessary to carry out the Plan in accordance with applicable law, the terms of the Plan, and any service agreements between the Employer and Pension Solutions, Inc., and/or their successors.

## **FORM OF RESOLUTION**

4. The Board reserves the right to appoint and/or rescind the appointment of any authorized representative and to designate and/or terminate the designation of any person selected to perform certain responsibilities on behalf of the authorized representative.
  
5. The CFO is authorized to finalize and execute such agreements and documents that may be necessary for the implementation and administration of the Plan Restatement, including but not limited to documents necessary to facilitate payment of third-party administration fees from Plan assets.
  
6. The attached Limited-Service Agreements and Administrative Services Agreements by and between the Employer and Pension Solutions, Inc. are hereby approved, and the CFO is authorized to finalize and execute said services agreements and fee schedule(s).

**PASSED AND APPROVED** at a regular meeting of the Owasso Public Schools 403b Plan Board of Education this \_\_\_\_\_ day of \_\_\_\_\_ 202\_\_\_\_.

## ADMINISTRATIVE SERVICES AGREEMENT

**THIS ADMINISTRATIVE SERVICES AGREEMENT** and the attached Fee Schedule Addendum are entered into as of July 1, 2026 (“Effective Date”) by and between Pension Solutions, Inc., an Oklahoma corporation (“PSI”) and Independent School District Number Eleven of Tulsa County, Oklahoma d/b/a Owasso Public Schools, an independent school district operating in the state of Oklahoma in accordance with the Oklahoma School Code, 70 O.S. § 1-101 *et. seq.* (the “District”). (Hereinafter, this Administrative Services Agreement and the Fee Schedule Addendum shall be collectively referred to as the “Agreement” and reference to the Fee Schedule Addendum specifically shall be referred to as the “Addendum.”)

**WHEREAS**, pursuant to a duly adopted resolution of the Board of Education for Independent School District Number Eleven of Tulsa County, Oklahoma, (“Board” the governing body of the District), the District has approved the adoption and subsequent restatement(s) of the Owasso Public Schools 403b Plan (the “Plan”), in accordance with applicable law; and

**WHEREAS**, in accordance with the adopting resolution, the District is the Plan Sponsor of the Plan and appointed itself the Plan Administrator of the Plan and as such is responsible for performing all actions necessary to carry out the administration of the Plan in accordance with applicable law, including express limitations regarding the performance of certain duties; and

**WHEREAS**, the District has designated its Phillip Storm (“Designee”) as the person authorized to carry out the Plan, execute Plan documents, and take such actions as may be necessary to administer the Plan on the behalf of the District; and

**WHEREAS**, the Board is a beneficiary of this Agreement and hereby agrees to ensure the performance of the District as Plan Administrator and its obligations, responsibilities and duties contained in this Agreement and to hold PSI harmless for any failure of the Plan Administrator to perform its duties and responsibilities in accordance with this Agreement as amended from time to time; and

**WHEREAS**, the Plan Administrator desires to engage PSI to perform certain third-party administrative services for the Plan and PSI agrees to perform certain administrative services for the Plan in accordance with this Agreement and applicable law; and

**WHEREAS**, as applicable, this Agreement serves to satisfy the disclosure requirements of applicable law.

**NOW THEREFORE**, the Board, the District (as Plan Sponsor and Plan Administrator), and PSI agree as follows:

## 1. Scope of Services

PSI agrees to perform the administrative services and only those services set forth in this Agreement (the "Services"). PSI is not responsible for any services rendered, or to be rendered, on behalf of the Plan by any party prior to the date of this Agreement, or for any services that PSI has not specifically agreed to perform on behalf of the Plan. Pursuant to this Agreement, PSI is serving as a limited third-party administrator for the Plan. PSI is not the Plan Administrator and is not a fiduciary with respect to the Plan. The District specifically acknowledges that PSI provides no investment advice whatsoever, and has no authority, discretionary or otherwise, over Plan assets or administrative decisions.

## 2. Fees

The District agrees to pay PSI the administration fees and other fees for the Services rendered through the date of termination of this Agreement in accordance with the Addendum. In addition to the fees set forth in this Agreement, the District agrees to pay PSI for any services performed by PSI that are in addition to the Services expressly stated in this Agreement, if such services are requested by the Plan Administrator, pursuant to the provisions of the Addendum, "Extraordinary Services," or pursuant to an agreement for additional services outside the scope of this Agreement, which may be entered into by the District and PSI for mutually agreed upon fees and costs.

The District acknowledges that PSI may also receive compensation indirectly ("Indirect Compensation") from sources other than the District or from Plan assets in connection with the Services as described in the Addendum. Any Indirect Compensation received by PSI shall be in addition to and separate from the fees payable pursuant to the Addendum. PSI represents that it will not receive any compensation, direct or indirect, for the Services provided in accordance with this Agreement, except for Indirect Compensation as defined and disclosed herein and the fees disclosed on the Addendum. In addition to continuing monthly, quarterly, semi-annual, or annual fees referenced on the Addendum, PSI will invoice associated fees and costs for the Services after such Services are completed. Payment of invoices should be received by PSI within thirty (30) days of the invoice date. If payment is not received in full within thirty (30) days, PSI reserves the right to impose late fees in accordance with the Addendum and deduct such late fees and any amounts owed from the Plan assets.

## 3. Term

This Agreement is effective from July 1, 2026, to June 30, 2027, for an annual term. Subsequent annual renewals must be approved by the Board in accordance with applicable state law. Either party may terminate this Agreement upon written notice in accordance with Section 9(g) of this Agreement. PSI shall not be responsible for the performance of the Services, including the maintaining of the Plan Administrator's files after the date this Agreement is terminated.

## 4. Confidentiality

PSI and the District may disclose certain business, financial, technical, intellectual property, materials, data, and other information to each other. All such non-public information that has been identified or otherwise designated as confidential or proprietary information or that is otherwise subject to safeguards or protection under applicable law shall be considered "Confidential Information." The receiving party shall use Confidential Information solely for the

purposes of rendering the Services pursuant to and in accordance with this Agreement and shall not, without the prior written consent of the other party, disclose any Confidential Information to any third party, except as may be disclosed as required by law, regulation, order of a court of competent jurisdiction or regulatory authority with subject matter jurisdiction. Nothing in this Agreement is intended to grant any rights to either party under any patent, copyright, trademark, service mark, or other intellectual property of the other party, except for the use of Confidential Information that is expressly permitted herein. PSI and the District acknowledge that any disclosure or unauthorized use of Confidential Information will constitute a material breach of this Agreement and cause substantial harm to the party that provided such Confidential Information initially for which damages would not be a fully adequate remedy.

## **5. Timeliness of Data**

Timely processing of information is essential to the proper administration of the Plan and avoids costly adverse consequences with regard to government oversight and compliance. The District will provide the information requested by PSI within fifteen (15) days after unless specifically stated otherwise or required by governing law.

## **6. Responsibilities of Plan Administrator**

- (a) The District represents that in accordance with applicable law, it has delegated the control and management of the assets of the Plan, including, but not necessarily limited to, the selection and monitoring of service providers for the Plan, interpretation of Plan provisions, evaluation of claims made by participants, eligibility of participants, selection of any qualified default investment alternative, and all other plan administrator responsibilities. The District may elect to have certain fees for the Services deducted from Plan assets, and it is the responsibility of the District to determine whether Plan assets may be used to pay any fee. The District further represents that an unsigned copy of this Agreement and the Addendum serves as a disclosure of certain fees as of the date this Agreement was provided to the Plan Administrator. Furthermore, the District acknowledges that such fees may change from time to time.
- (b) The District will provide PSI with requested information on a timely basis. PSI will rely on information provided by the District or its representatives, including third-parties, and will have no responsibility to independently verify the accuracy of the information. PSI assumes no responsibility to acquire information other than to request it from the District and will not be liable for any errors or omissions made as a result of incomplete or incorrect information provided by the Plan Administrator. Additional services that need to be performed or revised due to incomplete or inaccurate data furnished by or on behalf of the Plan or the District will be subject to additional fees. Information and data requested by PSI shall be provided by the District or its agents within thirty (30) days or by the date referenced in PSI's request for information or as required by governing law. The District will be responsible for all consequences, including but not limited to, penalties and/or sanctions imposed by the Internal Revenue Service ("IRS"), the United States Department of Labor ("DOL"), and any other local, state or federal governing authority.
- (c) As applicable, the District is responsible for ensuring that funds are actually and properly contributed to the Plan's custodial account and/or to Plan participants' individual custodial accounts as required:

- for tax deductibility; and
- to satisfy applicable minimum funding standards for pension plans; and
- to ensure employee deferrals and loan payments are deposited to within the time parameters required by the DOL and applicable law.

PSI has no obligation to monitor Plan contributions or to ensure that such contributions or loan payments are timely contributed to the Plan's custodial account and/or to Plan participants' individual custodial accounts.

- (d) Fees, costs, charges, additional contributions, refunds of employee deferrals, or any other penalties imposed by a governmental agency having jurisdiction over the Plan, are the sole responsibility of the Plan and the Plan Administrator. In accordance with the fees and costs referenced on the Addendum, PSI may be engaged to represent the Plan during an examination conducted by any governmental agency having jurisdiction over the Plan, including, but not limited to the IRS and DOL.
- (e) The District will be responsible for providing the notices and information required by law to Plan participants, including, without limitation, notices and distribution forms, as well as obtaining applicable signatures on distribution forms.
- (f) The District will be responsible for ensuring PSI is authorized to conduct business on behalf of the District for the Services provided herein and shall promptly execute such forms of the Custodians (as defined below) and PSI, as are necessary and appropriate.
- (g) The District shall provide PSI a census of all Plan participants within thirty (30) days of the end of the District's fiscal year. Such census information shall include: each participant's first and last name; each participant's social security number; and, each participant's date of birth, date of hire, and as applicable the date of separation from employment ("Census Information"). For the purpose of this paragraph, all Plan participants means, all employees or prior employees with plan assets maintained by an active custodial investment arrangement according to the Plan Adoption Agreement and/or inactive investment arrangements maintained by grandfathered recordkeepers, custodians, or annuity providers. In addition, the District is to provide PSI Census Information regarding all new enrollees in the Plan.
- (h) Due to the Plan's inactive investment arrangements maintained by grandfathered recordkeepers, custodians, and annuity providers, it is important that the District provide a plan participant's phone number and email address along with the completion of any necessary forms. The District acknowledges that in order to expedite a participant's request, PSI may communicate directly with the Plan participant.
- (i) The Plan's operation and tax qualification is affected by other plans sponsored by the District. Other entities owned/operated by the District or governed by the Board may also affect the Plan. The District is responsible for informing PSI of other potentially related plans or entities (including controlled groups and affiliated service groups), and any change in such information.

## **7. Administrative Services**

The following sets forth the Services to be performed by PSI under the terms and conditions of this Agreement:

- (a) Takeover/Installation services for transition to PSI, including review of plan provisions, compliance review with the Custodians, and completion of installation forms and documents.
- (b) Assistance with conversion of plan assets from another service provider (if applicable).
- (c) Perform data requests and analysis of census data from Custodians and/or Plan Administrator.
- (d) Assistance in the Plan Administrator's determination of participant eligibility, vesting and eligibility to receive employer contributions.
- (e) Interface with custodial websites of active investment arrangements to facilitate administration and benefit payments.
- (f) Serve as an authorized third-party signatory to facilitate benefit payments with inactive investment arrangements maintained by grandfathered recordkeepers, custodians, and/or annuity providers, as necessary and appropriate.
- (g) Serve as authorized third-party signatory to facilitate in-service transfers of Plan participants' funds with inactive investment arrangements maintained by grandfathered recordkeepers, custodians, and/or annuity providers to Custodians, as necessary and appropriate.
- (h) Routine calls and inquiries relating to the Services.
- (i) Assisting with Plan participant communication materials.
- (j) One (1) semi-annual meeting with the District and such additional meetings as reasonably necessary in connection with the Services at rates contained in the Addendum.

## **8. Limitation on Liability and Indemnity Provisions**

- (a) General. District agrees that the only responsibilities of PSI hereunder are to render the Services provided in this Agreement. In no event shall PSI be responsible for delays or failures in the performance of its duties that are caused by or result from acts of God, epidemic, war, acts of terrorism, computer viruses, governmental interference, fire or other casualty, software or hardware malfunction, communication line failure, power failure, acts or omission by the District or any other circumstances beyond the control of PSI. The Board agrees to ensure the performance of the District's obligations, responsibilities and duties contained in this Agreement (through its Designee or otherwise), including the payment of fees and costs, and, to hold PSI harmless for any failure of the District to perform its duties and responsibilities in accordance with this Agreement as amended from time to time.

- (b) Payment for Response to Subpoenas and Document Production Requests. In the event that PSI and/or any of its employees, officers, directors or agents receive a subpoena to provide testimony, or to produce documents, in connection with any judicial or quasi-judicial proceeding, relative to services provided by PSI pursuant to this Agreement, the District agrees to pay PSI an amount equal to the actual out of pocket expenses associated with producing said documents and/or appearing at said proceeding, and to pay to PSI an hourly fee for all time incurred by PSI personnel or its agents in preparing for and appearing at said proceeding, and for preparing documents to be produced, pursuant to the Addendum, "Extraordinary Services."
- (c) Non-representation. PSI is not a tax advisor; nor, the Plan Administrator. PSI will make recommendations to the District and Designee; however, in no way should such recommendations be relied upon in lieu of advice and counsel from the Plan's certified public accountant and/or licensed attorney.

## 9. General Provisions

- (a) Amendment. This Agreement may not be modified or amended except in writing signed by the parties. PSI shall communicate any proposed modification or amendment to the District not less than sixty (60) days prior to the effective date of the proposed modification or amendment. If the District objects to any such modification or amendment, it may exercise its termination rights under Section 3 of this Agreement.
- (b) Communications. The exchange of information between the parties regarding the implementation and administration of the Plan may be effectuated via the parties' designated email addresses or PSI's client portal. If the District elects not to exchange information by email or through the client portal, the District may be billed for the delivery of hardcopy documents according to the Addendum. Except as required in accordance with Section 9(f) - Event of Default, PSI may elect to deliver invoices, past due information, and other related items via email or through the client portal.
- (c) The District acknowledges that its employees consent to the storage and delivery of Personally Identifiable Information ("PII") when voluntarily electing to participate in the Plan. The District acknowledges and authorizes the electronic exchange of PII for the purpose of implementing and administering the Plan. Further, the District acknowledges that PSI has access to its employees' PII, and that in executing its duties under this Agreement, PSI must frequently acquire and exchange PII. The District recognizes that the acquisition and exchange of PII is generally performed through electronic means, including software operated in full or in part by Artificial Intelligence. The District shall hold PSI harmless for any unauthorized release of PII, plus any ensuing damages or losses experienced by an employee due to an unauthorized release or disclosure of PII unless there is an adjudicated finding of gross negligence or willful misconduct on the part of PSI.

For the purposes of this Agreement PII shall mean:

- i. Complete date of birth without redaction
- ii. Combination of first and last names or first initial and last name

- iii. Participant/ employee address that includes street number (P.O. Box), city, and zip code
- iv. Full nine (9) digit social security number without any redaction

For an unauthorized release or disclosure of PII to occur, PSI's actions must be unrelated or outside the scope of its duties under this Agreement. In addition, a combination of not less than three (3) of the above enumerated items must be released or disclosed within a single electronic exchange of information. The District acknowledges and authorizes the electronic exchange of information including PII in the course of implementing and administering the Plan.

- (d) Interpretation. This Agreement is not assignable by either party hereto without the prior written consent of the other party. Section and other headings are for reference only and shall not affect the meaning or interpretation of this Agreement. This Agreement is binding upon and shall inure to the benefit of the parties and their respective heirs, successors, survivors, administrators and assigns. This Agreement constitutes and contains the entire understanding between the parties and supersedes all prior oral or written statements dealing with the subject matter herein.
- (e) Severability. If any one or more of the provisions of this Agreement shall, for any reason, be illegal or invalid, such illegality or invalidity shall not affect any other provision of this Agreement and this Agreement shall be enforced as if such illegal or invalid provision had not been contained herein. This Agreement may be executed in multiple counterparts, each of which shall be deemed an original and all of which taken together shall constitute one and the same Agreement.
- (f) Event of Default. An Event of Default shall occur if any party fails to perform its responsibilities, duties, and obligations contained in this Agreement and such Event of Default is not remedied within sixty (60) days upon delivery of written notice by the injured party to the offending party in accordance with the notice requirements contained in this Agreement. Notice of an Event of Default by electronic means shall be deemed non-delivered. Written notice of an Event of Default by an injured party must include the following:
  - i. The Event of Default being alleged by the injured party; and
  - ii. The date the Event of Default occurred; and
  - iii. The date the injured party discovered the Event of Default; and
  - iv. Evidence supporting each alleged Event of Default stated in the written notice; and
  - v. The total actual damages sought, including, relief of the offending party to perform certain responsibilities or duties contained in this Agreement; and
  - vi. The date the alleged Event of Default must be remedied by the offending party, which date shall not be less than sixty (60) days from the delivery of the written notice.
- (g) Notice. Any and all notices required or permitted under this Agreement between the parties hereto shall be sufficient in all respects if: (i) reduced to writing; and, (ii) provided to the other party or parties not less than thirty (30) days prior to the effective date of the notification. Delivery of any notice is effective if:

- (i) delivered personally; or
- (ii) mailed by registered or certified mail, return receipt requested and postage prepaid; or
- (iii) delivered via a nationally recognized overnight courier service.

Delivery shall be made to the addresses set forth in this Agreement under the signatures of the parties or to such other address as either party may designate in writing to the other pursuant to Section 9(b) above.

(h) Arbitration. If this Agreement is breached or a party fails to perform its responsibilities, duties, and obligations contained herein and such breach or default is not cured and the injured party is not made whole within sixty (60) days upon delivery of written notice as provided herein, then such injured party may seek a settlement and remedies for damages by initiating a proceeding to arbitrate the matter pursuant to the rules and standards of the American Arbitration Association with such proceeding occurring in Oklahoma City, Oklahoma County, Oklahoma. The parties to this Agreement mutually agree as follows regarding the settlement of any dispute or damages through arbitration:

- i. The injured party must have provided the opposing party written notice of the claimed default, damages, and the requested remedy within no less than sixty (60) days from the delivery of such written notice for the opposing party to cure such default and make acceptable restitution.
- ii. Each party shall pay for its own costs and expenses incurred to arbitrate any dispute among the parties.
- iii. The arbitration shall be final and binding on all parties.
- iv. Judgment of an arbitrator's award may only be entered in a court having jurisdiction pursuant to this Agreement.
- v. The parties waive their right to a jury trial.
- vi. The arbitrator's award is not required to include factual findings or legal reasoning.
- vii. Any party's right to appeal or seek modification of an arbitrator's award is strictly limited.
- viii. The panel of arbitrators selected to arbitrate a settlement will typically include a minority of arbitrators who are familiar or affiliated with the retirement plan administration industry.
- ix. By law, an arbitration agreement does not preclude a party from seeking settlement of a dispute and/or remedies for damages in small claims court.

(i) Governing Law and Forum Selection. Except for the application of Section 9(f) above, this Agreement shall be governed by and construed according to the laws of the State of Oklahoma, without reference to conflict of law principles, except federal law preempts state law. The exclusive forum for any dispute between the Board, the District, and PSI that arises out of or relates to this Agreement shall be a court of competent jurisdiction in Oklahoma County, Oklahoma.

(j) Disclosures. The disclosures set forth in this Agreement constitute all of the disclosures required to be made by PSI pursuant to the provisions of 29 C.F.R. §2550.408b-2(c), regardless of whether this document is signed on behalf of the District or the Plan fails to

satisfy the definition of “covered” as defined by 29 C.F.R. §2550.408b-2. In addition, as required by law or otherwise, this Agreement serves as notice and satisfaction of any fee disclosures to be provided by PSI to the District in its capacity as a limited Plan fiduciary.

**IN WITNESS WHEREOF**, the parties hereto, by their duly authorized representatives, have caused this Agreement to be executed and effective the date first written above.

[SIGNATURE PAGE FOLLOWS]

PSI:

Pension Solutions, Inc.  
9116 North Kelley Avenue  
Oklahoma City, OK 73131



By: \_\_\_\_\_  
Geoffrey O. Stallings, President

Board of Education:

Independent School District Number Eleven of Tulsa  
County, Oklahoma d/b/a Owasso Public Schools  
1501 North Ash Stret  
Owasso, OK 74055

By: **Y** \_\_\_\_\_  
\_\_\_\_\_, Board of Education President

District:  
(Plan Sponsor and Plan Administrator)

By: **X** \_\_\_\_\_  
Phillip Storm, Chief Financial Officer

## LIMITED SERVICE AGREEMENT FOR RESTATEMENT OF THE OWASSO PUBLIC SCHOOLS 403B PLAN

**THIS LIMITED SERVICE AGREEMENT** (the “Agreement”) is entered into by and between Pension Solutions, Inc., an Oklahoma corporation (“PSI”) and Owasso Public Schools, an independent school district operating in the state of Oklahoma in accordance with the Oklahoma School Code, 70 O.S. § 1-101 *et. seq* (“Plan Sponsor”).

The Plan Sponsor maintains the Owasso Public Schools 403b Plan (the “Plan”), a supplemental 403(b) retirement plan for the benefit of its employees. The Plan is required to be restated in accordance with 2022 IRS Cumulative List (IRS Notice 2022-8), the Setting Every Community Up for Retirement Enhancement (SECURE) Act and the Coronavirus Aid, Relief, and Economic Security (CARES) Act and other applicable guidance (commonly referred to as the 403(b) Cycle 2 restatement).


PSI is a pre-approved document provider and has agreed to restate the plan by December 31, 2026, on a preapproved document according to the options and fees provided in Table I below. In addition, in accordance with Revenue Procedure 2023-37 an Interim Amendment covering the SECURE 2.0 Act must also be adopted prior to December 31, 2026. PSI has also agreed to prepare the Interim Amendment, which is included in the costs listed in Table I.

The Plan Sponsor acknowledges that the restatement must be executed no later than December 31, 2026, to ensure the Plan remains compliant with applicable law.

TABLE I – LIMITED ADMINISTRATIVE SERVICES	
ADMINISTRATIVE SERVICES	COSTS/FEEES
The restatement of the Plan pursuant to IRS Notice 2022-8, and the applicable cumulative list that identifies changes to Section 403(b) of the Code and the adoption of an Interim Amendment covering the SECURE 2.0 Act in accordance with Revenue Procedure 2023-37 prior to <u>December 31, 2026</u> .	\$975.00
OPTIONAL SERVICES	
<input type="checkbox"/> By initialing this line, I am electing to opt-out of electronic delivery and signing of the restatement documents. I acknowledge and understand that a fee of \$45.00 will be charged for the preparation and processing of documents for delivery via the USPS or private delivery service.	

Plan Sponsor: **Owasso Public Schools**

By:

X  \_\_\_\_\_ 4-9-26  
 Date  
**PHILLIP STORM CHIEF FINANCIAL OFFICER**  
 Please Print Name and Title

PSI: Pension Solutions, Inc. **Owasso Public Schools**

By:

X  \_\_\_\_\_ April 6, 2026  
 Date  
 Geoff Stallings

**Please Complete and Return this Page to Pension Solutions.**