



LINCOLNWOOD SCHOOL  
DISTRICT 74  
BOARD OF EDUCATION  
Finance Committee Meeting  
AGENDA  
Thursday, March 21, 2024 at **6:30**  
**PM**

BOARD OF EDUCATION  
Kevin Daly, *President*  
Rupal Shah Mandal, *Vice President*  
John P. Vranas, *Secretary*  
Maxie Boynton  
Myra A. Foutris  
Jay Oleniczak  
Peter D. Theodore

ADMINISTRATION  
Dr. David L. Russo, *Superintendent of Schools*  
Dr. Dominick M. Lupo, *Assistant Superintendent for Curriculum and Instruction*  
Courtney Whited, *Business Manager/CSBO*

*Agenda of the Finance Committee Meeting of the Board of Education of Lincolnwood School District 74, Cook County, Illinois, to be held in the Marvin Garlich Administration Building  
6950 N. East Prairie Road  
Lincolnwood, Illinois 60712,  
on Thursday, March 21, 2024.*

*IN-PERSON PARTICIPATION: It is expected that all members of the Finance Committee, plus several administrators, will be physically present at the Marvin Garlich Administration Building located at 6950 N. East Prairie Road, Lincolnwood, IL. The public is welcome.*

1. CALL TO ORDER/ROLL CALL

FINANCE COMMITTEE MEMBERS

Peter D. Theodore (BOE), Chair  
Jay Oleniczak (BOE), Co-Chair  
John P. Vranas (BOE)  
Michael Bartholomew, Community Member  
Maja Kenjar, Community Member  
Steven Pawlow, Community Member  
Paul Stellatos, Community Member

ADMINISTRATORS/STAFF

Dr. David L. Russo, Superintendent of Schools  
Dr. Dominick M. Lupo, Assistant Superintendent for Curriculum and Instruction  
Courtney Whited, Business Manager/CSBO  
Jordan Stephen, Director of Technology

2. AUDIENCE TO VISITORS

3. APPROVAL OF MINUTES

a. Finance Committee Meeting Minutes - **FEBRUARY 22, 2024**

3

Motion by member: \_\_\_\_\_ Seconded by: \_\_\_\_\_

4. INFORMATION/DISCUSSION: FUND BALANCE REPORT

a. Fund Balance Report - **JANUARY 2024**

6

5. OLD BUSINESS

6. NEW BUSINESS

a. 6-year | Kindergarten through Fifth Grade Math Program Adoption | Carnegie Learning, Inc. © 2014-2023

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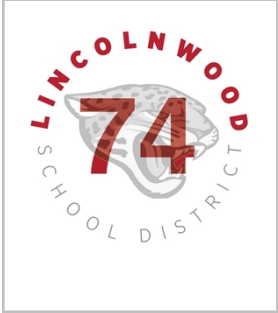
- b. Middle School Science Curriculum Adoption – © 2024 Amplify Education, Inc
- c. Donation from ROSE Foundation

- 7. INFORMATION/DISCUSSION: District Purchasing Update(s) - *Dr. David L. Russo, Dr. Dominick M. Lupo, Jordan Stephen*
  - a. Genuity Renewal for 2024-2025
  - b. IXL for 1st Grade
- 8. INFORMATION/DISCUSSION: District Finance Update - *Courtney Whited, Business Manager/CSBO*
  - a. SD74 FY24 Q3 Budget Review (attachment)
- 9. ADJOURNMENT

Motion by member: \_\_\_\_\_ Seconded by: \_\_\_\_\_

***Dr. David L. Russo, Superintendent of Schools***

*Lincolnwood School District 74 is subject to the requirements of the Americans with Disabilities Act of 1990. Individuals with disabilities who plan to attend this meeting and who require certain accommodations in order to allow them to observe and/or participate in this meeting, or who have questions regarding the accessibility of this meeting or facility, are requested to contact the District Office at 847-675-8234 promptly to allow Lincolnwood School District 74 to make reasonable accommodations for those persons.*



LINCOLNWOOD SCHOOL DISTRICT 74  
BOARD OF EDUCATION  
Finance Committee Meeting Minutes  
Thursday, February 22, 2024 at **6:30 PM**

BOARD OF EDUCATION  
Kevin Daly, *President*  
Rupal Shah Mandal, *Vice President*  
John P. Vranas, *Secretary*  
Maxie Boynton  
Myra A. Foutris  
Jay Oleniczak  
Peter D. Theodore

ADMINISTRATION  
Dr. David L. Russo, *Superintendent of Schools*  
Dr. Dominick M. Lupo, *Assistant Superintendent for Curriculum and Instruction*  
Courtney Whited, *Business Manager/CSBO*

*Minutes of the Finance Committee Meeting of the Board of Education of Lincolnwood School District 74, Cook County, Illinois, was held in the Marvin Garlich Administration Building 6950 N. East Prairie Road, Lincolnwood, Illinois 60712, on Thursday, February 22, 2024.*

1. CALL TO ORDER/ROLL CALL

Chair Theodore called the Finance Committee meeting to order at 6:33 p.m

FINANCE COMMITTEE MEMBERS

Peter D. Theodore (BOE), Chair  
Jay Oleniczak (BOE), Co-Chair  
John P. Vranas (BOE)  
Michael Bartholomew, Community Member

FINANCE COMMITTEE MEMBERS NOT PRESENT

Maja Kenjar, Community Member  
Steven Pawlow, Community Member  
Paul Stellatos, Community Member

ADMINISTRATORS/STAFF

Dr. David L. Russo, Superintendent of Schools  
Dr. Dominick M. Lupo, Assistant Superintendent for Curriculum and Instruction  
Courtney Whited, Business Manager/CSBO  
Jordan Stephen, Director of Technology

2. AUDIENCE TO VISITORS

3. APPROVAL OF MINUTES

a. Finance Committee Meeting Minutes - **NOVEMBER 16, 2023 - Committee Member Pawlow Amended**

A motion was made, seconded, and passed to approve the minutes from the November 16, 2023, Finance Committee meeting.

b. Finance Committee Meeting Minutes - **JANUARY 18, 2024**

A motion was made, seconded, and passed to approve the minutes from the January 18, 2024, Finance Committee meeting.

4. FUND BALANCE REPORT

a. Fund Balance Report - **DECEMBER 2023**

Courtney Whited, Business Manager/CSBO, presented the Fund Balance Report for December 2023.

5. OLD BUSINESS

None

6. NEW BUSINESS

None

a. Northern Illinois Independent Purchasing Cooperative (NIIPC) Joint Agreement & Bylaws

Courtney Whited, Business Manager/CSBO discussed the Northern Illinois Independent Purchasing Cooperative (NIIPC) Joint Agreement & Bylaws.

A motion was made, seconded and passed that the Finance Committee concurs with the Administration to recommend to the Board of Education to approve the Joint Agreement and Bylaws from Northern Illinois Independent Purchasing Cooperative to create an internal governing board structure moving forward.

b. AT&T/FirstNet Simplifi Phone

Jordan Stephen, Director of Technology presented the AT&T/FirstNet Simplifi Phone that would be installed into the elevator room and then into the elevator. This is a month to month cost with no term. The Committee tabled this item to allow the Administration to pursue other options to bring back to the Committee.

c. District Staff and Student 1:1 Technology Refresh For 2024-2025 School Year

A motion was made, seconded and passed that the Finance Committee concurs with the Administration to recommend to the Board of Education to continue with the replacement of District equipment in the amount not to exceed \$212,000.

7. District Purchasing Update(s) - *Dr. David L. Russo, Dr. Dominick M. Lupo, Jordan Stephen*

a. Facts4Me.com Renewal for the 2024-2025 School Year

b. Everyday Speech for the 2024-2025 School Year

8. District Finance Update - *Courtney Whited, Business Manager/CSBO*

a. EBC Preliminary Insurance Rate Changes

Courtney discussed the information that was presented at the EBC Preliminary Insurance meeting. The final rates will be announced in March.

b. Regular Education Transportation for School Districts 70, 71, 74 and 219 (*105 ILCS 5/29-6.1, P.A. 103-0430*)

The District will be seeking a one-year agreement which is projected to be a 4.9% increase.

c. Acceleration of Summer 2025 Construction

The contract is expected to be fully executed at the March 7th Board of Education meeting.

9. ADJOURNMENT

A motion was made, seconded and passed to adjourn the Finance Committee meeting. The Finance Committee meeting was adjourned at 7:03 p.m.

The next Finance Committee meeting will be Thursday, March 21, 2023 at 6:30 p.m. The public is welcome.

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Peter D. Theodore, Chair

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Jay Oleniczak, Co-chair

Lincolnwood School District 74

Fund Balances

Fiscal Year: 2023-2024

Month: January

Year: 2024

Fund Type:

Include Cash Balance

FY End Report

<u>Fund</u>	<u>Description</u>	<u>Beginning Balance</u>	<u>Revenue</u>	<u>Expense</u>	<u>Transfers</u>	<u>Fund Balance</u>
10	EDUCATIONAL	\$14,185,013.40	\$12,371,071.34	(\$10,698,358.32)	\$0.00	\$15,857,726.42
20	OPERATIONS & MAINTENANCE	\$4,215,122.81	\$1,055,374.45	(\$1,526,227.31)	(\$2,000,000.00)	\$1,744,269.95
30	DEBT SERVICE	\$805,374.06	\$874,798.90	(\$1,515,375.00)	\$0.00	\$164,797.96
40	TRANSPORTATION	\$1,742,536.99	\$845,289.71	(\$738,825.32)	\$0.00	\$1,849,001.38
50	MUNICIPAL RETIREMENT	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
51	IMRF	\$808,701.76	\$97,165.15	(\$100,827.07)	\$0.00	\$805,039.84
52	SOCIAL SECURITY AND MEDICARE	\$405,685.77	\$188,934.14	(\$186,996.13)	\$0.00	\$407,623.78
60	CAPITAL PROJECTS	\$4,594,191.64	\$645,505.34	(\$1,669,043.97)	\$2,000,000.00	\$5,570,653.01
70	WORKING CASH	\$586,340.43	\$6,274.98	\$0.00	\$0.00	\$592,615.41
80	TORT IMMUNITY	\$439,581.77	\$105,495.90	(\$8,655.00)	\$0.00	\$536,422.67
90	FIRE PREVENTION & SAFETY	\$2,946,220.34	\$136,964.30	(\$1,300,230.69)	\$0.00	\$1,782,953.95
99	LINCOLNWOOD SCHOOLS ACTIVITY FUN	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Grand Total:		\$30,728,768.97	\$16,326,874.21	(\$17,744,538.81)	\$0.00	\$29,311,104.37

End of Report

Lincolnwood School District 74

Treasurers Report FUND- All Funds As of 01/31/2024

Fiscal Year: 2023-2024

ASSETS

CASH & INVESTMENTS

Cash in Bank (+)	\$28,954,017.56
Imprest Fund (+)	\$15,074.55
Petty Cash (+)	\$100.00

Sub-total : CASH & INVESTMENTS	\$28,969,192.11
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DUE FROM OTHER GOVERNMENTS

Inter-Governmental Loans (+)	(\$467.03)
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Sub-total : DUE FROM OTHER GOVERNMENTS	(\$467.03)
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Total : ASSETS		\$28,968,725.08
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LIABILITIES

ACCOUNTS PAYABLE

Accounts Payable (+)	\$61,290.18
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Sub-total : ACCOUNTS PAYABLE	\$61,290.18
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OTHER CURRENT LIABILITIES

Other Liabilities (+)	\$35,819.66
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Payroll Liabilities (+)	(\$439,489.13)
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Sub-total : OTHER CURRENT LIABILITIES	(\$403,669.47)
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Total : LIABILITIES	(\$342,379.29)
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FUND BALANCE

Unreserved Fund Balance

Fund Balance (+)	\$30,728,768.97
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Sub-total : Unreserved Fund Balance	\$30,728,768.97
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NET INCREASE (DECREASE)

NET INCREASE (DECREASE) (+)	(\$1,417,664.60)
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Sub-total : NET INCREASE (DECREASE)	(\$1,417,664.60)
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Total : FUND BALANCE	\$29,311,104.37
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Total LIABILITIES + FUND BALANCE		\$28,968,725.08
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End of Report

Lincolnwood School District 74

Treasurers Report FUND- All Funds For the Period 01/01/2024 through 01/31/2024

Fiscal Year: 2023-2024

	01/01/2024 - 01/31/2024	Year To Date	Budget	Budget Balance	
<b>REVENUE</b>					
<b>LOCAL SOURCES</b>					
Property Tax Receipts (+)	\$0.00	\$12,981,923.46	\$27,268,336.00	\$14,286,412.54	47.6%
Payments in Lieu of Taxes (+)	\$173,016.52	\$856,566.75	\$1,290,000.00	\$433,433.25	66.4%
Tuition Payments Received (+)	\$0.00	\$68,740.00	\$240,000.00	\$171,260.00	28.6%
Interest Revenue Received (+)	\$44,705.92	\$286,351.48	\$630,000.00	\$343,648.52	45.5%
Sales to Pupils & Adults (+)	\$18,170.86	\$123,498.44	\$200,000.00	\$76,501.56	61.7%
Activity Fees Received (+)	\$3,198.00	\$57,539.41	\$122,500.00	\$64,960.59	47.0%
Other Local Revenue (+)	\$38,872.14	\$183,342.57	\$295,222.00	\$111,879.43	62.1%
Rental Revenue (+)	\$466.00	\$53,172.49	\$98,000.00	\$44,827.51	54.3%
<b>Sub-total : LOCAL SOURCES</b>	<b>\$278,429.44</b>	<b>\$14,611,134.60</b>	<b>\$30,144,058.00</b>	<b>\$15,532,923.40</b>	<b>48.5%</b>
<b>STATE SOURCES</b>					
State Grants & Aid Received (+)	\$231,906.82	\$1,006,303.11	\$1,622,000.00	\$615,696.89	62.0%
<b>Sub-total : STATE SOURCES</b>	<b>\$231,906.82</b>	<b>\$1,006,303.11</b>	<b>\$1,622,000.00</b>	<b>\$615,696.89</b>	<b>62.0%</b>
<b>FEDERAL SOURCES</b>					
Federal Grants & Aid Received (+)	\$9,622.41	\$709,436.50	\$1,238,804.00	\$529,367.50	57.3%
<b>Sub-total : FEDERAL SOURCES</b>	<b>\$9,622.41</b>	<b>\$709,436.50</b>	<b>\$1,238,804.00</b>	<b>\$529,367.50</b>	<b>57.3%</b>
<b>Total : REVENUE</b>	<b>\$519,958.67</b>	<b>\$16,326,874.21</b>	<b>\$33,004,862.00</b>	<b>\$16,677,987.79</b>	<b>49.5%</b>
<b>EXPENDITURES</b>					
<b>REGULAR K-12 PROGRAMS</b>					
Salaries (-)	\$602,171.18	\$3,336,210.41	\$8,010,572.00	\$4,674,361.59	41.6%
Employee Benefits (-)	\$117,595.54	\$582,430.97	\$1,372,227.00	\$789,796.03	42.4%
Termination Benefits (-)	\$26,002.51	\$175,478.37	\$403,608.00	\$228,129.63	43.5%
Purchased Services (-)	\$9,612.73	\$80,526.76	\$220,600.00	\$140,073.24	36.5%
Supplies & Materials (-)	\$5,763.48	\$188,781.88	\$660,788.00	\$472,006.12	28.6%
Capital Expenditures (-)	\$2,235.00	\$142,777.45	\$258,600.00	\$115,822.55	55.2%
Other Objects (-)	\$0.00	\$0.00	\$1,200.00	\$1,200.00	0.0%
Non-Capitalized Equipment (-)	\$467.32	\$3,825.25	\$113,250.00	\$109,424.75	3.4%
<b>Sub-total : REGULAR K-12 PROGRAMS</b>	<b>(\$763,847.76)</b>	<b>(\$4,510,031.09)</b>	<b>(\$11,040,845.00)</b>	<b>(\$6,530,813.91)</b>	<b>40.8%</b>
<b>PRE-K PROGRAMS</b>					
Salaries (-)	\$19,774.48	\$108,759.64	\$278,422.00	\$169,662.36	39.1%
Employee Benefits (-)	\$6,740.43	\$36,144.28	\$72,205.00	\$36,060.72	50.1%
Supplies & Materials (-)	\$123.84	\$952.75	\$4,200.00	\$3,247.25	22.7%
Capital Expenditures (-)	\$0.00	\$1,837.70	\$1,850.00	\$12.30	99.3%
Non-Capitalized Equipment (-)	\$0.00	\$1,307.55	\$500.00	(\$807.55)	261.5%
<b>Sub-total : PRE-K PROGRAMS</b>	<b>(\$26,638.75)</b>	<b>(\$149,001.92)</b>	<b>(\$357,177.00)</b>	<b>(\$208,175.08)</b>	<b>41.7%</b>
<b>SPECIAL ED PROGRAMS K-12</b>					
Salaries (-)	\$107,483.38	\$574,762.05	\$1,350,598.00	\$775,835.95	42.6%
Employee Benefits (-)	\$27,599.24	\$143,673.25	\$363,836.00	\$220,162.75	39.5%
Purchased Services (-)	\$197.00	\$773.12	\$800.00	\$26.88	96.6%
Supplies & Materials (-)	\$20.78	\$442.98	\$3,500.00	\$3,057.02	12.7%
Capital Expenditures (-)	\$0.00	\$1,845.00	\$5,500.00	\$3,655.00	33.5%
Other Objects (-)	\$0.00	\$250.00	\$200.00	(\$50.00)	125.0%

Operating Statement with Budget



Lincolnwood School District 74

Treasurers Report FUND- All Funds For the Period 01/01/2024 through 01/31/2024

Fiscal Year: 2023-2024

	<u>01/01/2024 - 01/31/2024</u>	<u>Year To Date</u>	<u>Budget</u>	<u>Budget Balance</u>	
Non-Capital Equipment (-)	\$0.00	\$338.35	\$3,500.00	\$3,161.65	9.7%
Sub-total : SPECIAL ED PROGRAMS K-12	(\$135,300.40)	(\$722,084.75)	(\$1,727,934.00)	(\$1,005,849.25)	41.8%
<b>REMEDIAL &amp; SUPPLEMENTAL K-12</b>					
Salaries (-)	\$48,579.20	\$256,709.42	\$606,768.00	\$350,058.58	42.3%
Employee Benefits (-)	\$9,424.35	\$44,120.23	\$98,830.00	\$54,709.77	44.6%
Purchased Services (-)	\$0.00	\$53,490.00	\$53,490.00	\$0.00	100.0%
Supplies & Materials (-)	\$0.00	\$563.88	\$9,965.00	\$9,401.12	5.7%
Sub-total : REMEDIAL & SUPPLEMENTAL K-12	(\$58,003.55)	(\$354,883.53)	(\$769,053.00)	(\$414,169.47)	46.1%
<b>INTERSCHOLASTIC PROGRAMS</b>					
Salaries (-)	\$1,420.66	\$38,579.82	\$100,000.00	\$61,420.18	38.6%
Employee Benefits (-)	\$42.57	\$1,783.09	\$4,300.00	\$2,516.91	41.5%
Supplies & Materials (-)	\$75.96	\$5,036.26	\$6,500.00	\$1,463.74	77.5%
Capital Expenditures (-)	\$0.00	\$0.00	\$1,500.00	\$1,500.00	0.0%
Other Objects (-)	\$0.00	\$3,500.00	\$3,500.00	\$0.00	100.0%
Sub-total : INTERSCHOLASTIC PROGRAMS	(\$1,539.19)	(\$48,899.17)	(\$115,800.00)	(\$66,900.83)	42.2%
<b>SUMMER SCHOOL PROGRAMS</b>					
Salaries (-)	\$0.00	\$37,467.38	\$71,000.00	\$33,532.62	52.8%
Employee Benefits (-)	\$0.00	\$1,654.88	\$3,545.00	\$1,890.12	46.7%
Supplies & Materials (-)	\$0.00	\$0.00	\$2,500.00	\$2,500.00	0.0%
Sub-total : SUMMER SCHOOL PROGRAMS	\$0.00	(\$39,122.26)	(\$77,045.00)	(\$37,922.74)	50.8%
<b>GIFTED PROGRAMS</b>					
Salaries (-)	\$38,652.14	\$212,746.27	\$502,478.00	\$289,731.73	42.3%
Employee Benefits (-)	\$9,152.96	\$40,426.03	\$93,752.00	\$53,325.97	43.1%
Supplies & Materials (-)	\$0.00	\$2,223.32	\$3,950.00	\$1,726.68	56.3%
Sub-total : GIFTED PROGRAMS	(\$47,805.10)	(\$255,395.62)	(\$600,180.00)	(\$344,784.38)	42.6%
<b>BILINGUAL PROGRAMS</b>					
Salaries (-)	\$53,869.24	\$292,585.98	\$689,408.00	\$396,822.02	42.4%
Employee Benefits (-)	\$9,010.80	\$45,267.86	\$110,064.00	\$64,796.14	41.1%
Purchased Services (-)	\$0.00	\$0.00	\$3,200.00	\$3,200.00	0.0%
Supplies & Materials (-)	\$258.89	\$775.79	\$10,000.00	\$9,224.21	7.8%
Sub-total : BILINGUAL PROGRAMS	(\$63,138.93)	(\$338,629.63)	(\$812,672.00)	(\$474,042.37)	41.7%
<b>ATTENDANCE &amp; SOCIAL WORK</b>					
Salaries (-)	\$31,857.20	\$175,214.60	\$414,143.00	\$238,928.40	42.3%
Employee Benefits (-)	\$3,870.75	\$19,832.70	\$47,683.00	\$27,850.30	41.6%
Purchased Services (-)	\$0.00	\$0.00	\$300.00	\$300.00	0.0%
Supplies & Materials (-)	\$254.70	\$1,051.48	\$2,000.00	\$948.52	52.6%
Sub-total : ATTENDANCE & SOCIAL WORK	(\$35,982.65)	(\$196,098.78)	(\$464,126.00)	(\$268,027.22)	42.3%
<b>HEALTH SERVICES</b>					
Salaries (-)	\$12,569.42	\$82,686.79	\$173,000.00	\$90,313.21	47.8%
Employee Benefits (-)	\$2,613.03	\$17,834.41	\$60,611.00	\$42,776.59	29.4%

Operating Statement with Budget

Lincolnwood School District 74

Treasurers Report FUND- All Funds For the Period 01/01/2024 through 01/31/2024

Fiscal Year: 2023-2024

	<u>01/01/2024 - 01/31/2024</u>	<u>Year To Date</u>	<u>Budget</u>	<u>Budget Balance</u>	
Purchased Services (-)	\$4,814.25	\$45,493.75	\$80,500.00	\$35,006.25	56.5%
Supplies & Materials (-)	\$152.29	\$2,238.07	\$5,400.00	\$3,161.93	41.4%
Capital Expenditures (-)	\$0.00	\$0.00	\$3,000.00	\$3,000.00	0.0%
Other Objects (-)	\$0.00	\$400.00	\$750.00	\$350.00	53.3%
Non-Capital Equipment (-)	\$0.00	\$0.00	\$1,500.00	\$1,500.00	0.0%
<b>Sub-total : HEALTH SERVICES</b>	<b>(\$20,148.99)</b>	<b>(\$148,653.02)</b>	<b>(\$324,761.00)</b>	<b>(\$176,107.98)</b>	<b>45.8%</b>
<b>PSYCHOLOGICAL SERVICES</b>					
Salaries (-)	\$14,267.54	\$78,471.47	\$185,478.00	\$107,006.53	42.3%
Employee Benefits (-)	\$3,241.80	\$16,422.23	\$39,511.00	\$23,088.77	41.6%
Purchased Services (-)	\$0.00	\$1,035.30	\$2,300.00	\$1,264.70	45.0%
Supplies & Materials (-)	\$33.88	\$33.88	\$1,400.00	\$1,366.12	2.4%
<b>Sub-total : PSYCHOLOGICAL SERVICES</b>	<b>(\$17,543.22)</b>	<b>(\$95,962.88)</b>	<b>(\$228,689.00)</b>	<b>(\$132,726.12)</b>	<b>42.0%</b>
<b>SPEECH PATHOLOGY &amp; AUDIOLOGY</b>					
Salaries (-)	\$19,347.98	\$109,995.94	\$284,658.00	\$174,662.06	38.6%
Employee Benefits (-)	\$3,432.16	\$17,547.97	\$42,774.00	\$25,226.03	41.0%
Purchased Services (-)	\$0.00	\$13,533.10	\$2,000.00	(\$11,533.10)	676.7%
Supplies & Materials (-)	\$85.11	\$445.74	\$1,450.00	\$1,004.26	30.7%
<b>Sub-total : SPEECH PATHOLOGY &amp; AUDIOLOGY</b>	<b>(\$22,865.25)</b>	<b>(\$141,522.75)</b>	<b>(\$330,882.00)</b>	<b>(\$189,359.25)</b>	<b>42.8%</b>
<b>OTHER SUPPORT SERVICES - PUPILS</b>					
Salaries (-)	\$6,595.85	\$45,715.50	\$86,000.00	\$40,284.50	53.2%
Employee Benefits (-)	\$369.38	\$2,798.00	\$5,870.00	\$3,072.00	47.7%
<b>Sub-total : OTHER SUPPORT SERVICES - PUPILS</b>	<b>(\$6,965.23)</b>	<b>(\$48,513.50)</b>	<b>(\$91,870.00)</b>	<b>(\$43,356.50)</b>	<b>52.8%</b>
<b>IMPROVEMENT OF INSTRUCTION</b>					
Salaries (-)	\$28,208.05	\$216,172.34	\$377,126.00	\$160,953.66	57.3%
Employee Benefits (-)	\$4,779.33	\$32,994.49	\$62,781.00	\$29,786.51	52.6%
Purchased Services (-)	\$0.00	\$24,507.32	\$67,785.00	\$43,277.68	36.2%
Supplies & Materials (-)	\$0.00	\$218.32	\$2,000.00	\$1,781.68	10.9%
Other Objects (-)	\$0.00	\$0.00	\$4,425.00	\$4,425.00	0.0%
<b>Sub-total : IMPROVEMENT OF INSTRUCTION</b>	<b>(\$32,987.38)</b>	<b>(\$273,892.47)</b>	<b>(\$514,117.00)</b>	<b>(\$240,224.53)</b>	<b>53.3%</b>
<b>EDUCATIONAL MEDIA</b>					
Salaries (-)	\$21,820.52	\$120,012.86	\$283,667.00	\$163,654.14	42.3%
Employee Benefits (-)	\$2,698.26	\$13,802.22	\$33,184.00	\$19,381.78	41.6%
Supplies & Materials (-)	\$1,671.52	\$12,778.37	\$19,000.00	\$6,221.63	67.3%
Non-Capital Equipment (-)	\$0.00	\$0.00	\$500.00	\$500.00	0.0%
<b>Sub-total : EDUCATIONAL MEDIA</b>	<b>(\$26,190.30)</b>	<b>(\$146,593.45)</b>	<b>(\$336,351.00)</b>	<b>(\$189,757.55)</b>	<b>43.6%</b>
<b>ASSESSMENT &amp; TESTING</b>					
Purchased Services (-)	\$0.00	\$45,492.30	\$45,493.00	\$0.70	100.0%
Supplies & Materials (-)	\$0.00	\$0.00	\$100.00	\$100.00	0.0%
<b>Sub-total : ASSESSMENT &amp; TESTING</b>	<b>\$0.00</b>	<b>(\$45,492.30)</b>	<b>(\$45,593.00)</b>	<b>(\$100.70)</b>	<b>99.8%</b>
<b>ADMIN SERVICES - BOARD OF ED</b>					

Operating Statement with Budget

Lincolnwood School District 74

Treasurers Report FUND- All Funds For the Period 01/01/2024 through 01/31/2024

Fiscal Year: 2023-2024

	<u>01/01/2024 - 01/31/2024</u>	<u>Year To Date</u>	<u>Budget</u>	<u>Budget Balance</u>	
Employee Benefits (-)	\$0.00	\$9,571.23	\$3,550.00	(\$6,021.23)	269.6%
Purchased Services (-)	\$6,193.48	\$96,913.09	\$230,000.00	\$133,086.91	42.1%
Supplies & Materials (-)	\$0.00	\$302.47	\$2,500.00	\$2,197.53	12.1%
Other Objects (-)	\$90.00	\$470.00	\$16,000.00	\$15,530.00	2.9%
Sub-total : ADMIN SERVICES - BOARD OF ED	(\$6,283.48)	(\$107,256.79)	(\$252,050.00)	(\$144,793.21)	42.6%
<b>SUPERINTENDENT</b>					
Salaries (-)	\$19,949.28	\$150,608.61	\$270,330.00	\$119,721.39	55.7%
Employee Benefits (-)	\$3,706.09	\$36,603.92	\$57,282.00	\$20,678.08	63.9%
Purchased Services (-)	\$0.00	\$2,798.01	\$7,500.00	\$4,701.99	37.3%
Supplies & Materials (-)	\$0.00	\$546.46	\$2,300.00	\$1,753.54	23.8%
Other Objects (-)	\$35.99	\$247.97	\$3,500.00	\$3,252.03	7.1%
Sub-total : SUPERINTENDENT	(\$23,691.36)	(\$190,804.97)	(\$340,912.00)	(\$150,107.03)	56.0%
<b>ADMIN SERVICES - SPECIAL ED</b>					
Salaries (-)	\$11,761.98	\$88,214.85	\$153,103.00	\$64,888.15	57.6%
Employee Benefits (-)	\$3,778.69	\$26,738.25	\$46,285.00	\$19,546.75	57.8%
Other Objects (-)	\$0.00	\$0.00	\$750.00	\$750.00	0.0%
Sub-total : ADMIN SERVICES - SPECIAL ED	(\$15,540.67)	(\$114,953.10)	(\$200,138.00)	(\$85,184.90)	57.4%
<b>WORKERS COMPENSATION INSURANCE</b>					
Purchased Services (-)	\$0.00	\$8,655.00	\$75,800.00	\$67,145.00	11.4%
Sub-total : WORKERS COMPENSATION INSURANCE	\$0.00	(\$8,655.00)	(\$75,800.00)	(\$67,145.00)	11.4%
<b>PROPERTY INSURANCE</b>					
Purchased Services (-)	\$0.00	\$0.00	\$120,000.00	\$120,000.00	0.0%
Sub-total : PROPERTY INSURANCE	\$0.00	\$0.00	(\$120,000.00)	(\$120,000.00)	0.0%
<b>PRINCIPAL</b>					
Salaries (-)	\$54,490.42	\$409,839.82	\$710,378.00	\$300,538.18	57.7%
Employee Benefits (-)	\$17,513.63	\$127,475.51	\$235,906.00	\$108,430.49	54.0%
Purchased Services (-)	\$104.56	\$2,628.50	\$5,050.00	\$2,421.50	52.0%
Supplies & Materials (-)	\$186.42	\$918.01	\$4,000.00	\$3,081.99	23.0%
Capital Expenditures (-)	\$0.00	\$0.00	\$1,000.00	\$1,000.00	0.0%
Other Objects (-)	\$0.00	\$1,196.99	\$2,400.00	\$1,203.01	49.9%
Sub-total : PRINCIPAL	(\$72,295.03)	(\$542,058.83)	(\$958,734.00)	(\$416,675.17)	56.5%
<b>OPERATION OF BUSINESS SERVICES</b>					
Salaries (-)	\$15,215.56	\$114,116.70	\$197,803.00	\$83,686.30	57.7%
Employee Benefits (-)	\$2,757.57	\$19,601.11	\$33,823.00	\$14,221.89	58.0%
Other Objects (-)	\$0.00	\$1,453.79	\$1,300.00	(\$153.79)	111.8%
Sub-total : OPERATION OF BUSINESS SERVICES	(\$17,973.13)	(\$135,171.60)	(\$232,926.00)	(\$97,754.40)	58.0%
<b>FISCAL SERVICES</b>					
Salaries (-)	\$18,713.88	\$140,417.45	\$243,583.00	\$103,165.55	57.6%
Employee Benefits (-)	\$8,210.62	\$58,551.18	\$101,468.00	\$42,916.82	57.7%
Purchased Services (-)	\$93.25	\$1,824.39	\$108,600.00	\$106,775.61	1.7%

Operating Statement with Budget

Lincolnwood School District 74

Treasurers Report FUND- All Funds For the Period 01/01/2024 through 01/31/2024

Fiscal Year: 2023-2024

	<u>01/01/2024 - 01/31/2024</u>	<u>Year To Date</u>	<u>Budget</u>	<u>Budget Balance</u>	
Supplies & Materials (-)	\$171.72	\$2,376.61	\$5,500.00	\$3,123.39	43.2%
Other Objects (-)	\$1,447.09	\$12,671.33	\$29,900.00	\$17,228.67	42.4%
<b>Sub-total : FISCAL SERVICES</b>	<b>(\$28,636.56)</b>	<b>(\$215,840.96)</b>	<b>(\$489,051.00)</b>	<b>(\$273,210.04)</b>	<b>44.1%</b>
<b>FACILITY ACQUISITION &amp; CONSTRUCTION</b>					
Purchased Services (-)	\$0.00	\$309,558.31	\$315,504.00	\$5,945.69	98.1%
Capital Expenditures (-)	\$384,764.96	\$1,393,856.56	\$1,689,139.00	\$295,282.44	82.5%
<b>Sub-total : FACILITY ACQUISITION &amp; CONSTRUCTION</b>	<b>(\$384,764.96)</b>	<b>(\$1,703,414.87)</b>	<b>(\$2,004,643.00)</b>	<b>(\$301,228.13)</b>	<b>85.0%</b>
<b>OPERATION &amp; MAINTENANCE OF PLANT</b>					
Salaries (-)	\$40,078.73	\$311,632.91	\$542,404.00	\$230,771.09	57.5%
Employee Benefits (-)	\$13,033.35	\$95,151.24	\$175,110.00	\$79,958.76	54.3%
Purchased Services (-)	\$78,236.20	\$752,622.81	\$1,011,473.00	\$258,850.19	74.4%
Supplies & Materials (-)	\$29,231.03	\$340,806.04	\$408,966.00	\$68,159.96	83.3%
Capital Expenditures (-)	\$4,020.74	\$1,337,970.33	\$1,588,362.00	\$250,391.67	84.2%
Other Objects (-)	\$0.00	\$0.00	\$1,000.00	\$1,000.00	0.0%
Non-Capitalized Equipment (-)	\$84.99	\$221.95	\$6,500.00	\$6,278.05	3.4%
<b>Sub-total : OPERATION &amp; MAINTENANCE OF PLANT</b>	<b>(\$164,685.04)</b>	<b>(\$2,838,405.28)</b>	<b>(\$3,733,815.00)</b>	<b>(\$895,409.72)</b>	<b>76.0%</b>
<b>PUPIL TRANSPORTATION</b>					
Purchased Services (-)	\$92,324.31	\$738,825.32	\$1,451,000.00	\$712,174.68	50.9%
<b>Sub-total : PUPIL TRANSPORTATION</b>	<b>(\$92,324.31)</b>	<b>(\$738,825.32)</b>	<b>(\$1,451,000.00)</b>	<b>(\$712,174.68)</b>	<b>50.9%</b>
<b>FOOD SERVICES</b>					
Salaries (-)	\$21,480.91	\$131,648.98	\$259,800.00	\$128,151.02	50.7%
Employee Benefits (-)	\$9,174.05	\$57,463.76	\$134,163.00	\$76,699.24	42.8%
Purchased Services (-)	\$0.00	\$29.58	\$17,000.00	\$16,970.42	0.2%
Supplies & Materials (-)	\$12,402.79	\$153,760.86	\$262,500.00	\$108,739.14	58.6%
Capital Expenditures (-)	\$0.00	\$0.00	\$8,000.00	\$8,000.00	0.0%
Other Objects (-)	\$99.00	\$699.00	\$800.00	\$101.00	87.4%
Non-Capitalized Equipment (-)	\$0.00	\$934.92	\$4,000.00	\$3,065.08	23.4%
Termination Benefits (-)	\$0.00	\$37,276.18	\$32,000.00	(\$5,276.18)	116.5%
<b>Sub-total : FOOD SERVICES</b>	<b>(\$43,156.75)</b>	<b>(\$381,813.28)</b>	<b>(\$718,263.00)</b>	<b>(\$336,449.72)</b>	<b>53.2%</b>
<b>INTERNAL SERVICES</b>					
Purchased Services (-)	\$3,210.68	\$11,518.61	\$24,500.00	\$12,981.39	47.0%
Supplies & Materials (-)	\$0.00	\$499.90	\$1,500.00	\$1,000.10	33.3%
<b>Sub-total : INTERNAL SERVICES</b>	<b>(\$3,210.68)</b>	<b>(\$12,018.51)</b>	<b>(\$26,000.00)</b>	<b>(\$13,981.49)</b>	<b>46.2%</b>
<b>INFORMATION SERVICES</b>					
Salaries (-)	\$6,041.08	\$45,308.10	\$78,534.00	\$33,225.90	57.7%
Employee Benefits (-)	\$3,819.12	\$27,071.65	\$47,297.00	\$20,225.35	57.2%
Purchased Services (-)	\$0.00	\$8,364.00	\$30,500.00	\$22,136.00	27.4%
Supplies & Materials (-)	\$2,107.95	\$9,899.69	\$8,000.00	(\$1,899.69)	123.7%
Capital Expenditures (-)	\$0.00	\$513.54	\$0.00	(\$513.54)	0.0%
Other Objects (-)	\$0.00	\$420.00	\$500.00	\$80.00	84.0%

Operating Statement with Budget

Lincolnwood School District 74

Treasurers Report FUND- All Funds For the Period 01/01/2024 through 01/31/2024

Fiscal Year: 2023-2024

	<u>01/01/2024 - 01/31/2024</u>	<u>Year To Date</u>	<u>Budget</u>	<u>Budget Balance</u>	
Sub-total : INFORMATION SERVICES	(\$11,968.15)	(\$91,576.98)	(\$164,831.00)	(\$73,254.02)	55.6%
OTHER SUPPORT SERVICES - ADMIN					
Salaries (-)	\$43,768.46	\$316,794.49	\$554,265.00	\$237,470.51	57.2%
Employee Benefits (-)	\$14,054.64	\$96,127.73	\$170,323.00	\$74,195.27	56.4%
Purchased Services (-)	\$0.00	\$0.00	\$500.00	\$500.00	0.0%
Supplies & Materials (-)	\$0.00	\$0.00	\$200.00	\$200.00	0.0%
Other Objects (-)	\$0.00	\$0.00	\$500.00	\$500.00	0.0%
Sub-total : OTHER SUPPORT SERVICES - ADMIN	(\$57,823.10)	(\$412,922.22)	(\$725,788.00)	(\$312,865.78)	56.9%
COMMUNITY SERVICES					
Purchased Services (-)	\$0.00	\$0.00	\$1,000.00	\$1,000.00	0.0%
Supplies & Materials (-)	\$0.00	\$0.00	\$830.00	\$830.00	0.0%
Sub-total : COMMUNITY SERVICES	\$0.00	\$0.00	(\$1,830.00)	(\$1,830.00)	0.0%
PAYMENTS TO OTHER LEAs					
Purchased Services (-)	\$0.00	\$72,607.06	\$164,676.00	\$92,068.94	44.1%
Other Objects (-)	\$29,186.86	\$1,148,061.92	\$2,557,723.00	\$1,409,661.08	44.9%
Sub-total : PAYMENTS TO OTHER LEAs	(\$29,186.86)	(\$1,220,668.98)	(\$2,722,399.00)	(\$1,501,730.02)	44.8%
DEBT SERVICE - INTEREST					
Interest on Bonds Outstanding (-)	\$0.00	\$310,375.00	\$600,725.00	\$290,350.00	51.7%
Sub-total : DEBT SERVICE - INTEREST	\$0.00	(\$310,375.00)	(\$600,725.00)	(\$290,350.00)	51.7%
DEBT SERVICE - PRINCIPAL					
Principal Payments on Bonds Outstanding (-)	\$0.00	\$1,205,000.00	\$1,205,000.00	\$0.00	100.0%
Sub-total : DEBT SERVICE - PRINCIPAL	\$0.00	(\$1,205,000.00)	(\$1,205,000.00)	\$0.00	100.0%
Total : EXPENDITURES	(\$2,210,496.78)	(\$17,744,538.81)	(\$33,861,000.00)	(\$16,116,461.19)	52.4%
OTHER FINANCING SOURCES & USES					
TRANSFERS FROM OTHER FUNDS					
Transfers Received (+)	\$0.00	\$2,000,000.00	\$0.00	(\$2,000,000.00)	0.0%
Sub-total : TRANSFERS FROM OTHER FUNDS	\$0.00	\$2,000,000.00	\$0.00	(\$2,000,000.00)	0.0%
TRANSFERS TO OTHER FUNDS					
Transfers Sent (-)	\$0.00	\$2,000,000.00	\$0.00	(\$2,000,000.00)	0.0%
Sub-total : TRANSFERS TO OTHER FUNDS	\$0.00	(\$2,000,000.00)	\$0.00	\$2,000,000.00	0.0%
Total : OTHER FINANCING SOURCES & USES	\$0.00	\$0.00	\$0.00	\$0.00	0.0%
NET INCREASE (DECREASE)	(\$1,690,538.11)	(\$1,417,664.60)	(\$856,138.00)	\$561,526.60	165.6%

End of Report

Operating Statement with Budget

**Lincolnwood School District 74**

**General Ledger - OBJECT REPORT**

Fiscal Year: 2023-2024 From Date:1/1/2024 To Date:1/31/2024

Account Mask: ??????????????????

Account Type: EXPENDITURE

Print accounts with zero balance  Include Inactive Accounts  Include PreEncumbrance

FUND / TYPE / FUNCTION / OBJECT	Preliminary 2024	Range To Date	Year To Date	Encumbrance	Budget Balance
<b>10 - EDUCATIONAL</b>					
0 - EXPENDITURES					
1100 - REGULAR K-12 PROGRAMS					
100 - SALARIES	\$8,010,572.00	\$602,171.18	\$3,336,210.41	\$4,442,454.64	\$231,906.95
200 - EMPLOYEE BENEFITS	\$1,245,577.00	\$108,634.92	\$529,993.66	\$697,296.45	\$18,286.89
300 - PURCHASED SERVICES	\$220,600.00	\$9,612.73	\$80,526.76	\$533.00	\$139,540.24
400 - SUPPLIES & MATERIALS	\$660,788.00	\$5,763.48	\$188,781.88	\$7,602.37	\$464,403.75
500 - CAPITAL OUTLAY	\$258,600.00	\$2,235.00	\$142,777.45	\$0.00	\$115,822.55
600 - OTHER OBJECTS	\$1,200.00	\$0.00	\$0.00	\$0.00	\$1,200.00
700 - NON-CAPITAL EQUIPMENT	\$113,250.00	\$467.32	\$3,825.25	\$469.21	\$108,955.54
800 - TERMINATION/VACATION PAYMENTS	\$403,608.00	\$26,002.51	\$175,478.37	\$71,220.74	\$156,908.89
1125 - PRE-K PROGRAMS					
100 - SALARIES	\$278,422.00	\$19,774.48	\$108,759.64	\$135,626.71	\$34,035.65
200 - EMPLOYEE BENEFITS	\$60,905.00	\$5,907.79	\$31,648.34	\$33,480.72	(\$4,224.06)
400 - SUPPLIES & MATERIALS	\$4,200.00	\$123.84	\$952.75	\$0.00	\$3,247.25
500 - CAPITAL OUTLAY	\$1,850.00	\$0.00	\$1,837.70	\$0.00	\$12.30
700 - NON-CAPITAL EQUIPMENT	\$500.00	\$0.00	\$1,307.55	\$0.00	(\$807.55)
1200 - SPECIAL ED PROGRAMS K-12					
100 - SALARIES	\$1,350,598.00	\$107,483.38	\$574,762.05	\$708,638.14	\$67,197.81
200 - EMPLOYEE BENEFITS	\$298,046.00	\$20,888.23	\$109,781.89	\$128,068.67	\$60,195.44
300 - PURCHASED SERVICES	\$800.00	\$197.00	\$773.12	\$0.00	\$26.88
400 - SUPPLIES & MATERIALS	\$3,500.00	\$20.78	\$442.98	\$348.17	\$2,708.85
500 - CAPITAL OUTLAY	\$5,500.00	\$0.00	\$1,845.00	\$0.00	\$3,655.00
600 - OTHER OBJECTS	\$200.00	\$0.00	\$250.00	\$0.00	(\$50.00)
700 - NON-CAPITAL EQUIPMENT	\$3,500.00	\$0.00	\$338.35	\$440.00	\$2,721.65
1250 - REMEDIAL & SUPPLEMENTAL K-12					
100 - SALARIES	\$606,768.00	\$48,579.20	\$256,709.42	\$352,943.20	(\$2,884.62)
200 - EMPLOYEE BENEFITS	\$90,559.00	\$8,769.12	\$40,602.03	\$60,118.76	(\$10,161.79)
300 - PURCHASED SERVICES	\$53,490.00	\$0.00	\$53,490.00	\$12,440.00	(\$12,440.00)
400 - SUPPLIES & MATERIALS	\$9,965.00	\$0.00	\$563.88	\$0.00	\$9,401.12
1500 - INTERSCHOLASTIC PROGRAMS					
100 - SALARIES	\$100,000.00	\$1,420.66	\$38,579.82	\$7,728.50	\$53,691.68
200 - EMPLOYEE BENEFITS	\$1,100.00	\$17.20	\$391.77	\$86.00	\$622.23
400 - SUPPLIES & MATERIALS	\$6,500.00	\$75.96	\$5,036.26	\$280.00	\$1,183.74

# Lincolnwood School District 74

## General Ledger - OBJECT REPORT

Fiscal Year: 2023-2024    From Date:1/1/2024    To Date:1/31/2024

Account Mask: ??????????????????

Account Type: EXPENDITURE

Print accounts with zero balance   
  Include Inactive Accounts   
  Include PreEncumbrance

FUND / TYPE / FUNCTION / OBJECT	Preliminary 2024	Range To Date	Year To Date	Encumbrance	Budget Balance
500 - CAPITAL OUTLAY	\$1,500.00	\$0.00	\$0.00	\$0.00	\$1,500.00
600 - OTHER OBJECTS	\$3,500.00	\$0.00	\$3,500.00	\$0.00	\$0.00
1600 - SUMMER SCHOOL PROGRAMS					
100 - SALARIES	\$71,000.00	\$0.00	\$37,467.38	\$0.00	\$33,532.62
200 - EMPLOYEE BENEFITS	\$1,145.00	\$0.00	\$496.32	\$0.00	\$648.68
400 - SUPPLIES & MATERIALS	\$2,500.00	\$0.00	\$0.00	\$0.00	\$2,500.00
1650 - GIFTED PROGRAMS					
100 - SALARIES	\$502,478.00	\$38,652.14	\$212,746.27	\$289,891.23	(\$159.50)
200 - EMPLOYEE BENEFITS	\$86,949.00	\$8,640.96	\$37,550.21	\$60,785.73	(\$11,386.94)
400 - SUPPLIES & MATERIALS	\$3,950.00	\$0.00	\$2,223.32	\$589.69	\$1,136.99
1800 - BILINGUAL PROGRAMS					
100 - SALARIES	\$689,408.00	\$53,869.24	\$292,585.98	\$398,276.42	(\$1,454.40)
200 - EMPLOYEE BENEFITS	\$100,030.00	\$8,246.88	\$41,199.63	\$57,635.97	\$1,194.40
300 - PURCHASED SERVICES	\$3,200.00	\$0.00	\$0.00	\$0.00	\$3,200.00
400 - SUPPLIES & MATERIALS	\$10,000.00	\$258.89	\$775.79	\$0.00	\$9,224.21
2110 - ATTENDANCE & SOCIAL WORK					
100 - SALARIES	\$414,143.00	\$31,857.20	\$175,214.60	\$238,928.40	\$0.00
200 - EMPLOYEE BENEFITS	\$41,899.00	\$3,427.73	\$17,385.13	\$24,240.59	\$273.28
300 - PURCHASED SERVICES	\$300.00	\$0.00	\$0.00	\$247.50	\$52.50
400 - SUPPLIES & MATERIALS	\$2,000.00	\$254.70	\$1,051.48	\$0.00	\$948.52
2130 - HEALTH SERVICES					
100 - SALARIES	\$173,000.00	\$12,569.42	\$82,686.79	\$58,821.78	\$31,491.43
200 - EMPLOYEE BENEFITS	\$36,101.00	\$676.63	\$5,541.73	\$7,229.34	\$23,329.93
300 - PURCHASED SERVICES	\$80,500.00	\$4,814.25	\$45,493.75	\$0.00	\$35,006.25
400 - SUPPLIES & MATERIALS	\$5,400.00	\$152.29	\$2,238.07	\$8,383.07	(\$5,221.14)
500 - CAPITAL OUTLAY	\$3,000.00	\$0.00	\$0.00	\$0.00	\$3,000.00
600 - OTHER OBJECTS	\$750.00	\$0.00	\$400.00	\$0.00	\$350.00
700 - NON-CAPITAL EQUIPMENT	\$1,500.00	\$0.00	\$0.00	\$0.00	\$1,500.00
2140 - PSYCHOLOGICAL SERVICES					
100 - SALARIES	\$185,478.00	\$14,267.54	\$78,471.47	\$107,006.53	\$0.00
200 - EMPLOYEE BENEFITS	\$37,026.00	\$3,051.54	\$15,367.73	\$21,470.81	\$187.46
300 - PURCHASED SERVICES	\$2,300.00	\$0.00	\$1,035.30	\$76.70	\$1,188.00
400 - SUPPLIES & MATERIALS	\$1,400.00	\$33.88	\$33.88	\$0.00	\$1,366.12
2150 - SPEECH PATHOLOGY & AUDIOLOGY					
100 - SALARIES	\$284,658.00	\$19,347.98	\$109,995.94	\$145,110.11	\$29,551.95

# Lincolnwood School District 74

## General Ledger - OBJECT REPORT

Fiscal Year: 2023-2024 From Date:1/1/2024 To Date:1/31/2024

Account Mask: ????????????????????

Account Type: EXPENDITURE

Print accounts with zero balance     
  Include Inactive Accounts     
  Include PreEncumbrance

FUND / TYPE / FUNCTION / OBJECT	Preliminary 2024	Range To Date	Year To Date	Encumbrance	Budget Balance
200 - EMPLOYEE BENEFITS	\$38,931.00	\$3,175.44	\$16,071.91	\$22,378.02	\$481.07
300 - PURCHASED SERVICES	\$2,000.00	\$0.00	\$13,533.10	\$0.00	(\$11,533.10)
400 - SUPPLIES & MATERIALS	\$1,450.00	\$85.11	\$445.74	\$61.18	\$943.08
2190 - OTHER SUPPORT SERVICES - PUPILS					
100 - SALARIES	\$86,000.00	\$6,595.85	\$45,715.50	\$21,695.60	\$18,588.90
200 - EMPLOYEE BENEFITS	\$450.00	\$40.38	\$215.45	\$152.91	\$81.64
2210 - IMPROVEMENT OF INSTRUCTION					
100 - SALARIES	\$377,126.00	\$28,208.05	\$216,172.34	\$148,491.04	\$12,462.62
200 - EMPLOYEE BENEFITS	\$48,534.00	\$3,676.00	\$24,736.79	\$18,271.14	\$5,526.07
300 - PURCHASED SERVICES	\$67,785.00	\$0.00	\$24,507.32	\$6,000.00	\$37,277.68
400 - SUPPLIES & MATERIALS	\$2,000.00	\$0.00	\$218.32	\$12,861.20	(\$11,079.52)
600 - OTHER OBJECTS	\$4,425.00	\$0.00	\$0.00	\$0.00	\$4,425.00
2220 - EDUCATIONAL MEDIA					
100 - SALARIES	\$283,667.00	\$21,820.52	\$120,012.86	\$163,654.14	\$0.00
200 - EMPLOYEE BENEFITS	\$29,216.00	\$2,393.36	\$12,135.89	\$16,922.61	\$157.50
400 - SUPPLIES & MATERIALS	\$19,000.00	\$1,671.52	\$12,778.37	\$1,956.99	\$4,264.64
700 - NON-CAPITAL EQUIPMENT	\$500.00	\$0.00	\$0.00	\$0.00	\$500.00
2230 - ASSESSMENT & TESTING					
300 - PURCHASED SERVICES	\$45,493.00	\$0.00	\$45,492.30	\$0.00	\$0.70
400 - SUPPLIES & MATERIALS	\$100.00	\$0.00	\$0.00	\$0.00	\$100.00
2310 - BOARD OF EDUCATION					
200 - EMPLOYEE BENEFITS	\$3,550.00	\$0.00	\$9,571.23	\$0.00	(\$6,021.23)
300 - PURCHASED SERVICES	\$230,000.00	\$6,193.48	\$96,913.09	\$0.00	\$133,086.91
400 - SUPPLIES & MATERIALS	\$2,500.00	\$0.00	\$302.47	\$0.00	\$2,197.53
600 - OTHER OBJECTS	\$16,000.00	\$90.00	\$470.00	\$0.00	\$15,530.00
2320 - SUPERINTENDENT					
100 - SALARIES	\$270,330.00	\$19,949.28	\$150,608.61	\$109,721.04	\$10,000.35
200 - EMPLOYEE BENEFITS	\$53,282.00	\$3,417.83	\$34,427.13	\$17,330.84	\$1,524.03
300 - PURCHASED SERVICES	\$7,500.00	\$0.00	\$2,798.01	\$0.00	\$4,701.99
400 - SUPPLIES & MATERIALS	\$2,300.00	\$0.00	\$546.46	\$0.00	\$1,753.54
600 - OTHER OBJECTS	\$3,500.00	\$35.99	\$247.97	\$0.00	\$3,252.03
2330 - ADMINISTRATIVE SERVICES SPECIAL ED					
100 - SALARIES	\$153,103.00	\$11,761.98	\$88,214.85	\$64,690.79	\$197.36
200 - EMPLOYEE BENEFITS	\$41,382.00	\$3,404.05	\$23,954.57	\$17,146.46	\$280.97
600 - OTHER OBJECTS	\$750.00	\$0.00	\$0.00	\$0.00	\$750.00



# Lincolnwood School District 74

## General Ledger - OBJECT REPORT

Fiscal Year: 2023-2024    From Date:1/1/2024    To Date:1/31/2024

Account Mask: ????????????????????

Account Type: EXPENDITURE

Print accounts with zero balance   
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FUND / TYPE / FUNCTION / OBJECT	Preliminary 2024	Range To Date	Year To Date	Encumbrance	Budget Balance
<b>2410 - PRINCIPAL</b>					
100 - SALARIES	\$710,378.00	\$54,490.42	\$409,839.82	\$299,763.70	\$774.48
200 - EMPLOYEE BENEFITS	\$202,588.00	\$14,920.07	\$108,278.04	\$75,009.89	\$19,300.07
300 - PURCHASED SERVICES	\$5,050.00	\$104.56	\$2,628.50	\$0.00	\$2,421.50
400 - SUPPLIES & MATERIALS	\$4,000.00	\$186.42	\$918.01	\$0.00	\$3,081.99
500 - CAPITAL OUTLAY	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00
600 - OTHER OBJECTS	\$2,400.00	\$0.00	\$1,196.99	\$0.00	\$1,203.01
<b>2510 - DIRECTION OF BUSINESS SUPPORT SERVICES</b>					
100 - SALARIES	\$197,803.00	\$15,215.56	\$114,116.70	\$83,685.48	\$0.82
200 - EMPLOYEE BENEFITS	\$30,973.00	\$2,539.15	\$17,958.38	\$12,880.08	\$134.54
600 - OTHER OBJECTS	\$1,300.00	\$0.00	\$1,453.79	\$0.00	(\$153.79)
<b>2520 - FISCAL SERVICES</b>					
100 - SALARIES	\$243,583.00	\$18,713.88	\$140,417.45	\$102,926.40	\$239.15
200 - EMPLOYEE BENEFITS	\$66,309.00	\$5,509.00	\$38,562.57	\$27,573.07	\$173.36
300 - PURCHASED SERVICES	\$108,600.00	\$93.25	\$1,824.39	\$0.00	\$106,775.61
400 - SUPPLIES & MATERIALS	\$5,500.00	\$171.72	\$2,376.61	\$0.00	\$3,123.39
600 - OTHER OBJECTS	\$29,900.00	\$1,447.09	\$12,671.33	\$0.00	\$17,228.67
<b>2560 - FOOD SERVICES</b>					
100 - SALARIES	\$259,800.00	\$21,480.91	\$131,648.98	\$105,841.46	\$22,309.56
200 - EMPLOYEE BENEFITS	\$93,105.00	\$5,993.46	\$35,558.73	\$29,975.38	\$27,570.89
300 - PURCHASED SERVICES	\$17,000.00	\$0.00	\$29.58	\$0.00	\$16,970.42
400 - SUPPLIES & MATERIALS	\$262,500.00	\$12,402.79	\$153,760.86	\$0.00	\$108,739.14
500 - CAPITAL OUTLAY	\$8,000.00	\$0.00	\$0.00	\$0.00	\$8,000.00
600 - OTHER OBJECTS	\$800.00	\$99.00	\$699.00	\$0.00	\$101.00
700 - NON-CAPITAL EQUIPMENT	\$4,000.00	\$0.00	\$934.92	\$0.00	\$3,065.08
800 - TERMINATION/VACATION PAYMENTS	\$32,000.00	\$0.00	\$37,276.18	\$0.00	(\$5,276.18)
<b>2570 - INTERNAL SERVICES</b>					
300 - PURCHASED SERVICES	\$24,500.00	\$3,210.68	\$11,518.61	\$443.00	\$12,538.39
400 - SUPPLIES & MATERIALS	\$1,500.00	\$0.00	\$499.90	\$0.00	\$1,000.10
<b>2630 - INFORMATION SERVICES</b>					
100 - SALARIES	\$78,534.00	\$6,041.08	\$45,308.10	\$33,225.90	\$0.00
200 - EMPLOYEE BENEFITS	\$34,788.00	\$2,877.92	\$20,154.09	\$14,398.25	\$235.66
300 - PURCHASED SERVICES	\$30,500.00	\$0.00	\$8,364.00	\$0.00	\$22,136.00
400 - SUPPLIES & MATERIALS	\$8,000.00	\$2,107.95	\$9,899.69	\$0.00	(\$1,899.69)
500 - CAPITAL OUTLAY	\$0.00	\$0.00	\$513.54	\$0.00	(\$513.54)

# Lincolnwood School District 74

## General Ledger - OBJECT REPORT

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Account Mask: ????????????????????

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FUND / TYPE / FUNCTION / OBJECT	Preliminary 2024	Range To Date	Year To Date	Encumbrance	Budget Balance
600 - OTHER OBJECTS	\$500.00	\$0.00	\$420.00	\$0.00	\$80.00
2660 - OTHER SUPPORT SERVICES - PUPILS					
100 - SALARIES	\$554,265.00	\$43,768.46	\$316,794.49	\$237,380.54	\$89.97
200 - EMPLOYEE BENEFITS	\$109,878.00	\$9,326.00	\$62,848.71	\$46,824.59	\$204.70
300 - PURCHASED SERVICES	\$500.00	\$0.00	\$0.00	\$0.00	\$500.00
400 - SUPPLIES & MATERIALS	\$200.00	\$0.00	\$0.00	\$0.00	\$200.00
600 - OTHER OBJECTS	\$500.00	\$0.00	\$0.00	\$0.00	\$500.00
3000 - COMMUNITY SERVICES					
300 - PURCHASED SERVICES	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00
400 - SUPPLIES & MATERIALS	\$830.00	\$0.00	\$0.00	\$0.00	\$830.00
4000 - PAYMENTS TO OTHER LEAS					
300 - PURCHASED SERVICES	\$0.00	\$0.00	\$0.00	\$6,000.00	(\$6,000.00)
4120 - PAYMENTS FOR SPECIAL ED PROGRAMS					
300 - PURCHASED SERVICES	\$164,676.00	\$0.00	\$72,607.06	\$0.00	\$92,068.94
600 - OTHER OBJECTS	\$2,557,723.00	\$29,186.86	\$1,148,061.92	\$0.00	\$1,409,661.08
10 - EDUCATIONAL Total:	\$24,181,070.00	\$1,530,671.12	\$10,698,358.32	\$9,775,730.85	\$3,706,980.83

**Lincolnwood School District 74**

**General Ledger - OBJECT REPORT**

Fiscal Year: 2023-2024 From Date:1/1/2024 To Date:1/31/2024

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FUND / TYPE / FUNCTION / OBJECT	Preliminary 2024	Range To Date	Year To Date	Encumbrance	Budget Balance
20 - OPERATIONS & MAINTENANCE					
0 - EXPENDITURES					
2540 - OPERATIONS & MAINTENANCE OF PLANTS					
100 - SALARIES	\$542,404.00	\$40,078.73	\$311,632.91	\$226,391.48	\$4,379.61
200 - EMPLOYEE BENEFITS	\$92,037.00	\$6,968.31	\$48,833.06	\$34,896.44	\$8,307.50
300 - PURCHASED SERVICES	\$1,011,473.00	\$78,236.20	\$752,622.81	\$0.00	\$258,850.19
400 - SUPPLIES & MATERIALS	\$408,966.00	\$29,231.03	\$340,806.04	\$9,702.71	\$58,457.25
500 - CAPITAL OUTLAY	\$153,000.00	\$4,020.74	\$72,110.54	\$1,430.00	\$79,459.46
600 - OTHER OBJECTS	\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00
700 - NON-CAPITAL EQUIPMENT	\$6,500.00	\$84.99	\$221.95	\$0.00	\$6,278.05
20 - OPERATIONS & MAINTENANCE Total:	\$2,215,380.00	\$158,620.00	\$1,526,227.31	\$272,420.63	\$416,732.06

Lincolnwood School District 74

General Ledger - OBJECT REPORT

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Print accounts with zero balance  Include Inactive Accounts  Include PreEncumbrance

FUND / TYPE / FUNCTION / OBJECT

Preliminary 2024 Range To Date Year To Date Encumbrance Budget Balance

30 - DEBT SERVICE

0 - EXPENDITURES

5140 - DEBT SERVICE - INTEREST PAYMENTS

600 - OTHER OBJECTS

\$600,725.00 \$0.00 \$310,375.00 \$0.00 \$290,350.00

5200 - INTEREST ON BONDS OUTSTANDING

600 - OTHER OBJECTS

\$1,205,000.00 \$0.00 \$1,205,000.00 \$0.00 \$0.00

30 - DEBT SERVICE Total: \$1,805,725.00 \$0.00 \$1,515,375.00 \$0.00 \$290,350.00

Lincolnwood School District 74

General Ledger - OBJECT REPORT

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Account Type: EXPENDITURE

Print accounts with zero balance  Include Inactive Accounts  Include PreEncumbrance

FUND / TYPE / FUNCTION / OBJECT

Preliminary 2024 Range To Date Year To Date Encumbrance Budget Balance

40 - TRANSPORTATION

0 - EXPENDITURES

2550 - PUPIL TRANSPORTATION

300 - PURCHASED SERVICES

\$1,451,000.00	\$92,324.31	\$738,825.32	\$0.00	\$712,174.68
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40 - TRANSPORTATION Total:	\$1,451,000.00	\$92,324.31	\$738,825.32	\$0.00	\$712,174.68
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FUND / TYPE / FUNCTION / OBJECT	Preliminary 2024	Range To Date	Year To Date	Encumbrance	Budget Balance
51 - IMRF					
0 - EXPENDITURES					
1100 - REGULAR K-12 PROGRAMS					
200 - EMPLOYEE BENEFITS	\$2,710.00	\$97.95	\$745.17	\$334.70	\$1,630.13
1125 - PRE-K PROGRAMS					
200 - EMPLOYEE BENEFITS	\$5,000.00	\$402.26	\$2,130.27	\$2,011.30	\$858.43
1200 - SPECIAL ED PROGRAMS K-12					
200 - EMPLOYEE BENEFITS	\$27,690.00	\$3,112.56	\$15,241.90	\$16,438.15	(\$3,990.05)
1500 - INTERSCHOLASTIC PROGRAMS					
200 - EMPLOYEE BENEFITS	\$700.00	\$3.50	\$336.02	\$67.04	\$296.94
1600 - SUMMER SCHOOL PROGRAMS					
200 - EMPLOYEE BENEFITS	\$500.00	\$0.00	\$130.27	\$0.00	\$369.73
1800 - BILINGUAL PROGRAMS					
200 - EMPLOYEE BENEFITS	\$200.00	\$13.97	\$27.30	\$25.83	\$146.87
2130 - HEALTH SERVICES					
200 - EMPLOYEE BENEFITS	\$13,000.00	\$996.76	\$6,176.90	\$4,664.64	\$2,158.46
2190 - OTHER SUPPORT SERVICES - PUPILS					
200 - EMPLOYEE BENEFITS	\$500.00	\$30.13	\$181.41	\$83.71	\$234.88
2210 - IMPROVEMENT OF INSTRUCTION					
200 - EMPLOYEE BENEFITS	\$5,000.00	\$394.66	\$2,843.60	\$2,170.64	(\$14.24)
2330 - ADMINISTRATIVE SERVICES SPECIAL ED					
200 - EMPLOYEE BENEFITS	\$1,600.00	\$121.62	\$876.27	\$668.91	\$54.82
2410 - PRINCIPAL					
200 - EMPLOYEE BENEFITS	\$14,400.00	\$1,090.79	\$7,946.80	\$6,004.66	\$448.54
2520 - FISCAL SERVICES					
200 - EMPLOYEE BENEFITS	\$19,000.00	\$1,484.02	\$10,697.10	\$8,162.12	\$140.78
2540 - OPERATIONS & MAINTENANCE OF PLANTS					
200 - EMPLOYEE BENEFITS	\$43,700.00	\$3,175.18	\$23,712.85	\$17,212.42	\$2,774.73
2560 - FOOD SERVICES					
200 - EMPLOYEE BENEFITS	\$22,838.00	\$1,653.92	\$9,670.65	\$8,158.04	\$5,009.31
2630 - INFORMATION SERVICES					
200 - EMPLOYEE BENEFITS	\$6,500.00	\$479.06	\$3,451.51	\$2,634.83	\$413.66
2660 - OTHER SUPPORT SERVICES - PUPILS					
200 - EMPLOYEE BENEFITS	\$31,300.00	\$2,432.70	\$16,659.05	\$13,114.52	\$1,526.43
<b>51 - IMRF Total:</b>	<b>\$194,638.00</b>	<b>\$15,489.08</b>	<b>\$100,827.07</b>	<b>\$81,751.51</b>	<b>\$12,059.42</b>

# Lincolnwood School District 74

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FUND / TYPE / FUNCTION / OBJECT	Preliminary 2024	Range To Date	Year To Date	Encumbrance	Budget Balance
52 - SOCIAL SECURITY AND MEDICARE					
0 - EXPENDITURES					
1100 - REGULAR K-12 PROGRAMS					
200 - EMPLOYEE BENEFITS	\$123,940.00	\$8,862.67	\$51,692.14	\$62,683.85	\$9,564.01
1125 - PRE-K PROGRAMS					
200 - EMPLOYEE BENEFITS	\$6,300.00	\$430.38	\$2,365.67	\$2,656.59	\$1,277.74
1200 - SPECIAL ED PROGRAMS K-12					
200 - EMPLOYEE BENEFITS	\$38,100.00	\$3,598.45	\$18,649.46	\$20,988.60	(\$1,538.06)
1250 - REMEDIAL & SUPPLEMENTAL K-12					
200 - EMPLOYEE BENEFITS	\$8,271.00	\$655.23	\$3,518.20	\$4,783.54	(\$30.74)
1500 - INTERSCHOLASTIC PROGRAMS					
200 - EMPLOYEE BENEFITS	\$2,500.00	\$21.87	\$1,055.30	\$155.43	\$1,289.27
1600 - SUMMER SCHOOL PROGRAMS					
200 - EMPLOYEE BENEFITS	\$1,900.00	\$0.00	\$1,028.29	\$0.00	\$871.71
1650 - GIFTED PROGRAMS					
200 - EMPLOYEE BENEFITS	\$6,803.00	\$512.00	\$2,875.82	\$3,862.82	\$64.36
1800 - BILINGUAL PROGRAMS					
200 - EMPLOYEE BENEFITS	\$9,834.00	\$749.95	\$4,040.93	\$5,462.21	\$330.86
2110 - ATTENDANCE & SOCIAL WORK					
200 - EMPLOYEE BENEFITS	\$5,784.00	\$443.02	\$2,447.57	\$3,332.10	\$4.33
2130 - HEALTH SERVICES					
200 - EMPLOYEE BENEFITS	\$11,510.00	\$939.64	\$6,115.78	\$4,264.28	\$1,129.94
2140 - PSYCHOLOGICAL SERVICES					
200 - EMPLOYEE BENEFITS	\$2,485.00	\$190.26	\$1,054.50	\$1,433.78	(\$3.28)
2150 - SPEECH PATHOLOGY & AUDIOLOGY					
200 - EMPLOYEE BENEFITS	\$3,843.00	\$256.72	\$1,476.06	\$1,937.32	\$429.62
2190 - OTHER SUPPORT SERVICES - PUPILS					
200 - EMPLOYEE BENEFITS	\$4,920.00	\$298.87	\$2,401.14	\$994.13	\$1,524.73
2210 - IMPROVEMENT OF INSTRUCTION					
200 - EMPLOYEE BENEFITS	\$9,247.00	\$708.67	\$5,414.10	\$3,810.84	\$22.06
2220 - EDUCATIONAL MEDIA					
200 - EMPLOYEE BENEFITS	\$3,968.00	\$304.90	\$1,666.33	\$2,290.45	\$11.22
2320 - SUPERINTENDENT					
200 - EMPLOYEE BENEFITS	\$4,000.00	\$288.26	\$2,176.79	\$1,585.93	\$237.28
2330 - ADMINISTRATIVE SERVICES SPECIAL ED					

**Lincolnwood School District 74**

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Print accounts with zero balance     
  Include Inactive Accounts     
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FUND / TYPE / FUNCTION / OBJECT	Preliminary 2024	Range To Date	Year To Date	Encumbrance	Budget Balance
200 - EMPLOYEE BENEFITS	\$3,303.00	\$253.02	\$1,907.41	\$1,397.91	(\$2.32)
2410 - PRINCIPAL					
200 - EMPLOYEE BENEFITS	\$18,918.00	\$1,502.77	\$11,250.67	\$8,331.86	(\$664.53)
2510 - DIRECTION OF BUSINESS SUPPORT SERVICES					
200 - EMPLOYEE BENEFITS	\$2,850.00	\$218.42	\$1,642.73	\$1,202.41	\$4.86
2520 - FISCAL SERVICES					
200 - EMPLOYEE BENEFITS	\$16,159.00	\$1,217.60	\$9,291.51	\$6,803.82	\$63.67
2540 - OPERATIONS & MAINTENANCE OF PLANTS					
200 - EMPLOYEE BENEFITS	\$39,373.00	\$2,889.86	\$22,605.33	\$16,436.72	\$330.95
2560 - FOOD SERVICES					
200 - EMPLOYEE BENEFITS	\$18,220.00	\$1,526.67	\$12,234.38	\$7,513.85	(\$1,528.23)
2630 - INFORMATION SERVICES					
200 - EMPLOYEE BENEFITS	\$6,009.00	\$462.14	\$3,466.05	\$2,541.77	\$1.18
2660 - OTHER SUPPORT SERVICES - PUPILS					
200 - EMPLOYEE BENEFITS	\$29,145.00	\$2,295.94	\$16,619.97	\$12,492.04	\$32.99
52 - SOCIAL SECURITY AND MEDICARE Total:	\$377,382.00	\$28,627.31	\$186,996.13	\$176,962.25	\$13,423.62



**Lincolnwood School District 74**

**General Ledger - OBJECT REPORT**

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Account Type: EXPENDITURE

Print accounts with zero balance       Include Inactive Accounts       Include PreEncumbrance

FUND / TYPE / FUNCTION / OBJECT

Preliminary 2024      Range To Date      Year To Date      Encumbrance      Budget Balance

60 - CAPITAL PROJECTS

0 - EXPENDITURES

2530 - FACILITY ACQUISITION & CONSTRUCTION

FUND / TYPE / FUNCTION / OBJECT	Preliminary 2024	Range To Date	Year To Date	Encumbrance	Budget Balance
300 - PURCHASED SERVICES	\$269,504.00	\$0.00	\$275,187.41	\$0.00	(\$5,683.41)
500 - CAPITAL OUTLAY	\$1,689,139.00	\$384,764.96	\$1,393,856.56	\$0.00	\$295,282.44
<b>60 - CAPITAL PROJECTS Total:</b>	<b>\$1,958,643.00</b>	<b>\$384,764.96</b>	<b>\$1,669,043.97</b>	<b>\$0.00</b>	<b>\$289,599.03</b>

Lincolnwood School District 74

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Print accounts with zero balance  Include Inactive Accounts  Include PreEncumbrance

FUND / TYPE / FUNCTION / OBJECT

Preliminary 2024 Range To Date Year To Date Encumbrance Budget Balance

80 - TORT IMMUNITY

0 - EXPENDITURES

2362 - WORKERS COMPENSATION INSURANCE

300 - PURCHASED SERVICES

\$75,800.00 \$0.00 \$8,655.00 \$0.00 \$67,145.00

2371 - PROPERTY INSURANCE

300 - PURCHASED SERVICES

\$120,000.00 \$0.00 \$0.00 \$0.00 \$120,000.00

80 - TORT IMMUNITY Total: \$195,800.00 \$0.00 \$8,655.00 \$0.00 \$187,145.00

Lincolnwood School District 74

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FUND / TYPE / FUNCTION / OBJECT

Preliminary 2024 Range To Date Year To Date Encumbrance Budget Balance

90 - FIRE PREVENTION & SAFETY

0 - EXPENDITURES

2530 - FACILITY ACQUISITION & CONSTRUCTION

300 - PURCHASED SERVICES

\$46,000.00 \$0.00 \$34,370.90 \$0.00 \$11,629.10

2540 - OPERATIONS & MAINTENANCE OF PLANTS

500 - CAPITAL OUTLAY

\$1,435,362.00 \$0.00 \$1,265,859.79 \$0.00 \$169,502.21

90 - FIRE PREVENTION & SAFETY Total: \$1,481,362.00 \$0.00 \$1,300,230.69 \$0.00 \$181,131.31

Lincolnwood School District 74

General Ledger - OBJECT REPORT

Fiscal Year: 2023-2024 From Date:1/1/2024 To Date:1/31/2024

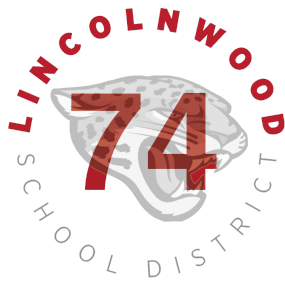
Account Mask: ????????????????????

Account Type: EXPENDITURE

- Print accounts with zero balance
- Include Inactive Accounts
- Include PreEncumbrance

FUND / TYPE / FUNCTION / OBJECT	Preliminary 2024	Range To Date	Year To Date	Encumbrance	Budget Balance
Grand Total:	\$33,861,000.00	\$2,210,496.78	\$17,744,538.81	\$10,306,865.24	\$5,809,595.95

End of Report



## Executive Summary Finance Committee Meeting

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DATE: March 21, 2024

TOPIC: 6-year | Kindergarten through Fifth Grade Math Program Adoption | Carnegie Learning, Inc. © 2014-2023

PREPARED BY: Dominick Lupo

**Recommended for:**

- Action
- Discussion
- Information

**Purpose/Background:**

The Board of Education approves all curricular adoptions and contracts.

The Middle School Math Committee met throughout the 2023-2024 school year to discuss and review kindergarten through fifth grade math programming. The committee consisted of eight teacher representatives ranging in expertise from all grade-levels and programs that utilize our elementary school math materials. Representatives unpacked several of the most popular and widely used programs at the elementary school level. Using a standardized rubric, along with committee discussion, the team chose the *ClearMath Solutions* program from *Carnegie Learning, Inc. © 2014-2023* as the series best suited to meet our students' needs. This program balances an age appropriate amount of materials with ample meaningful learning experiences to teach the skill or topic being explored.

Committee members were unanimous in their support of the *Carnegie* program for this adoption. This program recommendation replaces the *McGraw-Hill MyMath* program.

This program represents a positive instructional shift in rigor and style in which math is presented and explored by elementary school students. The most up-to-date math instruction employs a conceptual approach meaning students learn to understand why math operations work, versus the traditional procedural approach where students learn by memorizing a series of steps to solve a problem.

This program will allow us to meet our students at their current levels of understanding, and give us more options for extending their understanding beyond our current program's capabilities. In addition to print and electronic materials, this adoption comes with *Carnegie's* virtual program called *Mathia*. In *Mathia* students practice and extend their capabilities virtually. The tool utilizes an "intelligence" program that both assesses students on current understanding and offers immediate feedback to students as they are working through conceptual and application-based problems.

In addition to the materials and subscriptions, the administration is looking to secure a solid, initial professional development plan as we work with the teachers to roll out this new program. This will include four, full-day initial implementation workshops (two for Rutledge Hall and two for Todd Hall) where representatives from *Carnegie* will be individually working with all of our elementary school teachers on lesson planning and delivery. They will also be working with the staff to help them understand and utilize all of the available tools targeted to specific profiles of learning needs. Additionally, we are looking to have *Carnegie* instructors come back six times over the course of the first year of implementation to continue guiding our staff in the direction of full implementation of the program.

The District's Legal Counsel reviewed all documents and stated that the signed Amendment to *Carnegie's* terms and conditions and privacy policy from the middle school adoption remains in place to cover this quote.

**Fiscal Impact:**

The fiscal impact of the 6-year adoption will be \$233,733.12 for all materials and professional development.

**Recommendation:**

The Finance Committee concurs with the Administration's recommendation to the Board of Education to approve this contract from *Carnegie Learning, Inc. © 2014-2023* for the adoption of the K-5 math curriculum in the amount of \$233,733.12 from the 2024-2025 school year to the 2029-2030 school year.



4 Smithfield St, 8th Floor  
 Pittsburgh, PA 15222  
 (888) 851-7094  
 Send Payment to: PO Box 646003, Pittsburgh, PA 15264

QUOTE NO: Q-47869

DATE: 3/12/2024  
 EXPIRES ON: 7/31/2024

CONTACT INFORMATION		
Lincolnwood School District 74 6950 N. E. Prairie Rd. Lincolnwood, IL, 60712	Dominick Lupo Chief Academic Officer 847-675-8234 dlupo@sd74.org	Tony DePalma Account Manager (724) 263-8547 tdepalma@carnegielearning.com

**SIX YEARS - Student Resources (K-5)**

ITEM	DESCRIPTION	TERM	UNITS	NET TOTAL
ClearMath 1e - Bundle Grade K	ClearMath 1e Elementary - Bundle	6 Yrs	130	USD 30,651.40
• ClearMath 1e - Student Resource Book Grade K	Print - Student Resource Book	6 Yrs	130	Included
• ClearMath 1e - Digital Course Student Collection Grade K	Digital Course - Student	6 Yrs	130	Included
• MATHia Adventure Student License	MATHia Adventure per Student License	6 Yrs	130	Included
• ClearMath 1e - Student Practice Book Grade K	Print - Student Practice	6 Yrs	130	Included
ClearMath 1e - Bundle Grade 1	ClearMath 1e Elementary - Bundle	6 Yrs	120	USD 28,293.60
• ClearMath 1e - Student Resource Book Grade 1	Print - Student Resource Book	6 Yrs	120	Included
• ClearMath 1e - Digital Course Student Collection Grade 1	Digital Course - Student	6 Yrs	120	Included
• MATHia Adventure Student License	MATHia Adventure per Student License	6 Yrs	120	Included
• ClearMath 1e - Student Practice Book Grade 1	Print - Student Practice	6 Yrs	120	Included
ClearMath 1e - Bundle Grade 2	ClearMath 1e Elementary - Bundle	6 Yrs	115	USD 27,114.70
Includes 2nd grade and GATE 2nd				
• ClearMath 1e - Student Resource Book Grade 2	Print - Student Resource Book	6 Yrs	115	Included
• ClearMath 1e - Digital Course Student Collection Grade 2	Digital Course - Student	6 Yrs	115	Included
• MATHia Adventure Student License	MATHia Adventure per Student License	6 Yrs	115	Included
• ClearMath 1e - Student Practice Book Grade 2	Print - Student Practice	6 Yrs	115	Included
ClearMath 1e - Bundle Grade 3	ClearMath 1e Elementary - Bundle	6 Yrs	130	USD 30,651.40
Includes GATE 2nd and 3rd grade				
• ClearMath 1e - Student Resource Book Grade 3	Print - Student Resource Book	6 Yrs	130	Included

ITEM	DESCRIPTION	TERM	UNITS	NET TOTAL
• ClearMath 1e - Digital Course Student Collection Grade 3	Digital Course - Student	6 Yrs	130	Included
• MATHia Adventure Student License	MATHia Adventure per Student License	6 Yrs	130	Included
• ClearMath 1e - Student Practice Book Grade 3	Print - Student Practice	6 Yrs	130	Included
ClearMath 1e - Bundle Grade 4	ClearMath 1e Elementary - Bundle	6 Yrs	115	USD 27,114.70
Includes ACC 3rd and 4th grade				
• ClearMath 1e - Student Resource Book Grade 4	Print - Student Resource Book	6 Yrs	115	Included
• ClearMath 1e - Digital Course Student Collection Grade 4	Digital Course - Student	6 Yrs	115	Included
• MATHia Adventure Student License	MATHia Adventure per Student License	6 Yrs	115	Included
• ClearMath 1e - Student Practice Book Grade 4	Print - Student Practice	6 Yrs	115	Included
ClearMath 1e - Bundle Grade 5	ClearMath 1e Elementary - Bundle	6 Yrs	135	USD 31,830.30
Includes GATE 3rd, ACC 4th, and 5th grade				
• ClearMath 1e - Student Resource Book Grade 5	Print - Student Resource Book	6 Yrs	135	Included
• ClearMath 1e - Digital Course Student Collection Grade 5	Digital Course - Student	6 Yrs	135	Included
• MATHia Adventure Student License	MATHia Adventure per Student License	6 Yrs	135	Included
• ClearMath 1e - Student Practice Book Grade 5	Print - Student Practice	6 Yrs	135	Included
<b>SIX YEARS - Student Resources (K-5) TOTAL:</b>				USD 158,089.00

### Teacher Resources (K-5)

ITEM	DESCRIPTION	TERM	UNITS	NET TOTAL
ClearMath 1e - Teacher's Implementation Guide - Print and Digital Collection Grade K	ClearMath 1e Elementary - Teacher's Implementation Guide - Print and Digital Collection	6 Yrs	7	USD 360.50
• ClearMath 1e - Teacher's Implementation Guide Grade K	Print - Teacher's Implementation Guide		7	Included
• ClearMath 1e - Digital Course Teacher Collection Grade K	Digital Course - Teacher	6 Yrs	7	Included
ClearMath 1e - Teacher's Implementation Guide - Print and Digital Collection Grade 1	ClearMath 1e Elementary - Teacher's Implementation Guide - Print and Digital Collection	6 Yrs	8	USD 412.00
• ClearMath 1e - Teacher's Implementation Guide Grade 1	Print - Teacher's Implementation Guide		8	Included
• ClearMath 1e - Digital Course Teacher Collection Grade 1	Digital Course - Teacher	6 Yrs	8	Included
ClearMath 1e - Teacher's Implementation Guide - Print and Digital Collection Grade 2	ClearMath 1e Elementary - Teacher's Implementation Guide - Print and Digital Collection	6 Yrs	8	USD 412.00



ITEM	DESCRIPTION	TERM	UNITS	NET TOTAL
• ClearMath 1e - Teacher's Implementation Guide Grade 2	Print - Teacher's Implementation Guide		8	Included
• ClearMath 1e - Digital Course Teacher Collection Grade 2	Digital Course - Teacher	6 Yrs	8	Included
ClearMath 1e - Teacher's Implementation Guide - Print and Digital Collection Grade 3	ClearMath 1e Elementary - Teacher's Implementation Guide - Print and Digital Collection	6 Yrs	6	USD 309.00
• ClearMath 1e - Teacher's Implementation Guide Grade 3	Print - Teacher's Implementation Guide		6	Included
• ClearMath 1e - Digital Course Teacher Collection Grade 3	Digital Course - Teacher	6 Yrs	6	Included
ClearMath 1e - Teacher's Implementation Guide - Print and Digital Collection Grade 4	ClearMath 1e Elementary - Teacher's Implementation Guide - Print and Digital Collection	6 Yrs	6	USD 309.00
• ClearMath 1e - Teacher's Implementation Guide Grade 4	Print - Teacher's Implementation Guide		6	Included
• ClearMath 1e - Digital Course Teacher Collection Grade 4	Digital Course - Teacher	6 Yrs	6	Included
ClearMath 1e - Teacher's Implementation Guide - Print and Digital Collection Grade 5	ClearMath 1e Elementary - Teacher's Implementation Guide - Print and Digital Collection	6 Yrs	7	USD 360.50
• ClearMath 1e - Teacher's Implementation Guide Grade 5	Print - Teacher's Implementation Guide		7	Included
• ClearMath 1e - Digital Course Teacher Collection Grade 5	Digital Course - Teacher	6 Yrs	7	Included
ClearMath - Manipulatives Kit Grade K	Manipulatives Kit		6	USD 4,500.00
ClearMath - Manipulatives Kit Grade 5	Manipulatives Kit		6	USD 4,500.00
ClearMath - Manipulatives Kit Grade 4	Manipulatives Kit		6	USD 4,500.00
ClearMath - Manipulatives Kit Grade 3	Manipulatives Kit		6	USD 4,500.00
ClearMath - Manipulatives Kit Grade 2	Manipulatives Kit		6	USD 4,500.00
ClearMath - Manipulatives Kit Grade 1	Manipulatives Kit		6	USD 4,500.00
<b>Teacher Resources (K-5) TOTAL:</b>				USD 29,163.00

### Professional Learning

ITEM	DESCRIPTION	TERM	UNITS	NET TOTAL
PL MATH Onsite Implementation Workshop National ClearMath Elementary	Onsite Initial Implementation Workshop, per day (includes materials), up to 25 participants per facilitator		2	USD 9,000.00
PL MATH Onsite Implementation Workshop National ClearMath Elementary	Onsite Initial Implementation Workshop, per day (includes materials), up to 25 participants per facilitator		2	USD 9,000.00

ITEM	DESCRIPTION	TERM	UNITS	NET TOTAL
PL MATH Onsite Coaching, & Support	Onsite Job-Embedded In-Classroom Support, Coaching, Consulting per day		6	USD 21,000.00
<b>Professional Learning TOTAL:</b>				USD 39,000.00

<b>SUBTOTAL:</b>	USD 226,252.00
<b>SHIPPING AND HANDLING:</b>	USD 7,521.12
<b>STATE SALES TAX:</b>	USD 0.00
<b>TOTAL:</b>	USD 233,773.12

**Additional Notes:**

For fastest processing please email purchase order to [tdepalma@carnegielearning.com](mailto:tdepalma@carnegielearning.com)

## TERMS AND CONDITIONS

- The attached quotation is confidential and proprietary information not to be distributed or shared by the Customer.
- By accepting this quote, Customer accepts Carnegie Learning, Inc.'s Terms of Use policy available at: <http://www.carnegielearning.com/terms-of-use>
- Prices are subject to change without notice.
- Quote is valid for 30 days.
- Quoted sales tax is an estimate. Sales Tax is subject to change based on shipping locations and rates at the time of order processing.
- Please include your tax exempt certificate with your purchase order. The Carnegie Learning Federal Tax ID# is 25-1805640.
- Payment Terms: Net 30 Days. Payment of entire invoice amount is required within 30 days from invoice date.
- All media sold by Carnegie Learning, Inc. are sold on a non-returnable basis. The only exceptions to this policy are:
  - Media received that was not ordered (wrong title, wrong quantity). Materials must be in original shrink wrap, if applicable, and not used.
  - Media received in a damaged condition that would render it unsuitable for use.
  - Customer is responsible to inspect textbook shipments and report any textbook quantity, title or damage issues within 45 days of receipt. Failure to report issues within the 45 days could result in additional return fees.
- Carnegie Learning, Inc. is under no obligation to accept return requests after 45 days of customer receipt of order.
- Customer is responsible for expedited shipping costs that fall outside of our standard delivery process. All textbooks carry a standard shipping time frame of 4-6 weeks. Shipments will occur earlier if stock is available.
- Multi-year licenses run consecutively from license activation date.
- The school district is responsible for providing all hardware necessary to run the software, as specified in CLI's Systems Requirements (available at <http://carnegielearning.com/support>). Prices do not include hardware.
- All Professional Development services purchased expire at the term of this agreement. Standalone Professional Development purchases will expire one year from the purchase date.
- An additional credit card fee of 2.5% of total before sales tax will be applied if customer decides to pay by credit card.

- All credit memos and credit balances that exceed 120 days old will first be applied to any existing balances. After application, any remaining credit balance will be refunded via a check. Carnegie Learning will mail the check to the address on file.

EMC SCHOOL AND MONDO EDUCATION ARE PART OF CARNEGIE LEARNING  
4 SMITHFIELD ST, 8TH FLOOR, PITTSBURGH, PA 15222  
Phone 888.851.7094 + Fax 412.690.2444 + [www.carnegielearning.com](http://www.carnegielearning.com)

## AMENDMENT TO AGREEMENT BETWEEN THE BOARD OF EDUCATION OF LINCOLNWOOD SCHOOL DISTRICT 74 AND CARNEGIE LEARNING

This Amendment is entered into as of April 6, 2023, by and between the Board of Education of Lincolnwood School District No. 74 ("School District") and Carnegie Learning, Inc. ("Carnegie Learning") pursuant to the Quote number Q-39504 dated March 10, 2023, and the Carnegie Learning's Terms of Use (collectively, the "Agreement"), and shall continue in force for any extensions of the Agreement or subsequent renewals or order forms, unless otherwise agreed by the Parties.

1. **Terms and Conditions.** This Amendment modifies the Agreement entered into by the Parties. Terms and conditions not amended herein shall have the same meaning as in the Agreement. If there is conflict between this Amendment and the Agreement, the terms of this Amendment will prevail. Carnegie Learning shall not materially modify or amend the Agreement (see <https://www.carnegielearning.com/terms-of-use>) during the term of this Agreement or any extension thereof, without providing written notice.
2. **Auto-Renewal.** The term of the Agreement between the parties shall not automatically renew. Subsequent extensions of the Agreement shall require notice to and approval of the School District.
3. **FOIA/OMA.** School District shall not be required to make any claim of privilege that may be applicable to prevent disclosure in response to, and will not be required to notify Carnegie Learning prior to any disclosure in response to, a valid FOIA request for information that is not confidential or proprietary. Carnegie Learning acknowledges and agrees that the Agreement is not confidential or exempt from disclosure under the Illinois Freedom of Information Act or Open Meetings Act.
4. **Governing Law/Venue/Dispute Resolution.** This Agreement will be governed and construed in accordance with the laws of the State of Illinois, without regard to any conflicts of law provisions. Venue for all actions between the parties shall lie solely in the Circuit Court of Cook County, Illinois. Carnegie Learning hereby agrees to this exclusive venue, to personal jurisdiction of this court, and to service of process in accordance with its rules of civil procedure, and Carnegie Learning waives any objection that this venue is not convenient. Any references to binding arbitration, the waiver of the right to a jury trial, or the waiver of claims which may be litigated on a class or representative basis shall be deleted from the Agreement as it currently exists or as it may be modified or amended in the future.
5. **Illinois Student Privacy Laws.** In addition to its obligation to maintain student data in accordance with applicable federal laws, Carnegie Learning shall also maintain all student data obtained from School District in accordance with any applicable Illinois laws, including (without limitation, and only to the extent applicable) the *Illinois School Student Records Act* (105 ILCS 10/1 *et seq.*); and the *Illinois Student Online Personal Protection Act* (105 ILCS 85/1 *et seq.*) (herein "SOPPA"). In accordance with SOPPA, Carnegie Learning and the School District agree as follows:

- a. The categories or types of SOPPA-covered information, as defined in Section 5 of SOPPA, to be provided to Carnegie Learning pursuant to this Agreement may include:
  - i. Information created by or provided to Carnegie Learning by a student or the student's parent or legal guardian in the course of the student's, parent's, or legal guardian's use of the operator's site, service, or application for K through 12 school purposes;
  - ii. Information created by or provided to Carnegie Learning by an employee or agent of School District for school purposes; or
  - iii. Information gathered by Carnegie Learning through the operation of its site, service, or application for K through 12 school purposes and which personally identifies a student, including, but not limited to, information in the student's educational record, first and last name, electronic mail address, test results, grades, evaluations, documents, student identifiers, or search activity.
- b. The products or services being provided to School District by Carnegie Learning are as described in the documents that comprise this Agreement.
- c. Pursuant to the federal Family Educational Rights and Privacy Act of 1974 ("FERPA"), Carnegie Learning is acting as a school official with a legitimate educational interest, is performing an institutional service or function for which the school would otherwise use employees, under the direct control of the school, with respect to the use and maintenance of covered information, and is using the covered information only for an authorized purpose and may not re-disclose it to third parties or affiliates, unless otherwise permitted under SOPPA, without permission from the school or parent, or pursuant to court order.
- d. If a breach is attributed to Carnegie Learning under SOPPA, any and all costs and expenses incurred by School District in investigating and remediating the breach will be allocated to Carnegie Learning, except for the cost of School District personnel. The costs and expenses may include, but are not limited to, all items described in Section 15(4)(D) of SOPPA, as now written or as may be amended from time to time. Carnegie Learning shall indemnify and defend School District, and its individual Board members, officers, employees, agents, and successors against third-party claims, charges, causes of action, and liability of any kind, including but not limited to attorney's fees, arising directly and specifically from any security or privacy breach involving SOPPA-covered information as a result of negligent or intentional acts or omissions of Carnegie Learning, and any damages limitations in the Agreement shall not apply to School District in this regard.

- e. Carnegie Learning must delete or transfer to School District all SOPPA-covered information within ninety (90) days if the information is no longer needed for the purposes of this Agreement. Carnegie Learning must delete, within a reasonable time period, a student's SOPPA-covered information if the School District requests deletion, unless the student or student's parent consents to the maintenance of the SOPPA-covered information.
- f. Because School District maintains a website, SOPPA requires that School District must publish a copy of this Agreement on the website.
- g. In case of any breach, within the most expedient time possible and without unreasonable delay, but no later than 30 calendar days after the determination that a breach has occurred, Carnegie Learning shall notify the Superintendent of Schools of any breach of the students' SOPPA-covered information.
- h. Carnegie Learning shall provide to School District a list of any third parties or affiliates to whom Carnegie Learning is currently disclosing SOPPA-covered information or has disclosed SOPPA-covered information. This list must, at a minimum, be updated and provided to the school by the beginning of each fiscal year and at the beginning of each calendar year.

6. **Insurance.** During the term of this Agreement and any renewal thereof, Carnegie Learning shall maintain a cyber-liability insurance policy insuring against data breaches. School District shall be named as an additional insured on such policy. Any damages limitations in this Agreement shall not apply to School District in its capacity as an additional insured.

7. **Authority to Execute.** Each signatory hereto represents and warrants that he or she has the proper corporate authority to execute this Amendment and bind his or her entity to the terms and conditions hereof.

**WHEREAS,** this Amendment and its terms and conditions are agreed upon by the Parties on the date set forth above.

**BOARD OF EDUCATION OF  
LINCOLNWOOD SCHOOL DISTRICT 74**

**CARNEGIE LEARNING, INC.**

By:   
Kevin Daly

By: Julie Katruska

Its: Board President

Its: Julie Katruska

Date: 4-6-23

Date: 3/16/2023



# Privacy Policy

[If you are a student user, please review our Student Privacy Policy.](#)

## **Carnegie Learning Privacy Policy**

Updated and Effective: January 3, 2024

This Privacy Policy applies to any websites, software, applications, or interactive features or online services, owned and operated by Carnegie Learning, Inc. (hereinafter “Carnegie Learning,” “we” or “us”) that post a link to or include this Privacy Policy, including the learning platforms we provide access to through separate licensing agreements (“Learning Platforms”) (collectively, our “Sites”). This Privacy Policy also applies to any information we collect offline in connection with use of the Sites.

Please read this Privacy Policy carefully. Please review our [Terms of Use](#), which also applies to your use of the Sites. By accessing, visiting, using, interacting, or submitting information to the Sites, you agree to the practices described in this Privacy Policy.

Note that this privacy policy applies to visitors to our Sites (“Visitors”), which may include teachers, or representatives of schools, learning institutions, school districts, state or local board of education or other sponsoring organizations (“Schools”) that utilize our Learning Platforms.

Our Sites are mostly general audience websites and are not intended for use by children younger than age 13 (“Children” and each, a “Child”). However, our Learning Platforms may be used by students authorized and instructed to access and use our Learning Platforms by their School, including Children, for whom we have certain more restrictive practices. To understand our privacy practices with regard to student users, including Children younger than age 13, please review our [Student Privacy Policy](#).

By directing your students to our Learning Platforms, you consent on their behalf to our collection, use, and sharing of their information in accordance with our [Student Privacy Policy](#). To the extent there is any conflict between our general privacy practices and our privacy practices with regard to Children, the Student Privacy Policy controls.

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## 1. INFORMATION WE COLLECT

Carnegie Learning collects information about you directly through our Sites, automatically when you visit the Sites, and sometimes from third parties. Some of this information may be considered “personal information” or “personal data”, some of which may be “sensitive”, under various applicable laws. We consider information that identifies you as a specific, identified individual (such as your name and email address) to be personal information. We will also treat additional information, including IP addresses and cookie identifiers, as “personal information” where required by applicable law. Note that we may de-identify or pseudonymize personal information so that it is non-personal, such as aggregating or converting it to a code, sometimes using a function commonly known as “hash”. We maintain and use de-identified data without attempting to re-identify it, except where permitted by applicable law, such as to determine whether our de-identification processes satisfy legal requirements. We will treat de-identified and pseudonymized information as non-personal to the fullest extent allowed by applicable law. If we combine non-personal information with personal information, then we will treat the combined information as personal information under this Privacy Policy.

### **Information You Provide Directly**

Visitors may provide certain information directly to the Sites, such as when you contact us for information about our products, customer support, or research inquiries, when you register for an account, or when you sign-up for our email mailing list.

In order to obtain access to and use our Learning Platforms, we ask you to register to become a member. During this member registration process, and through other interactions on our Sites and across the Learning Platforms, we collect information that teachers and administrators provide to us as well as information about their students, including, but not limited to, your name, the school or school district you work for, the physical address of your school, your job title, the grades and curricula you teach, your student roster, your email address, and your phone number. When you register for the Learning Platforms, we will also ask you to create a password. When you use the Learning Platforms, we collect information about your interactions with the Learning Platforms, including the courses you use. Some of our Learning Platforms offer live courses, which may be recorded and made available for later viewing within the Learning Platform.

We may also ask you for feedback about usage of various products and services as well as satisfaction with those products and services.

### **Information We Collect Automatically**

We and our third-party business partners may use a variety of technologies that automatically or passively collect certain information when you visit or interact with our Sites (“Usage Information”). Usage Information may include your browser types and versions and operating system you are using, search terms and results within the Sites and all areas of the Sites that you visit, date and time you visit the Sites, the length of your stay on certain courses or pages and your language settings, among other information. In addition, we automatically collect your IP address or other unique identifier (“Device Identifier”) for any computer, mobile phone or other device you may use to access the Sites. A Device Identifier is a number that is automatically assigned to your device used to access the Sites, and our servers identify your device by its Device Identifier. We may be able to collect or infer your approximate location through information we collect, such as IP address.

Many browsers and devices allow you to block the transmission of automatically collected information, such as your IP address, or to block the installation of cookies. You may choose to enable these options. However, enabling these options may prevent you from using many of the core features and functions available on our Sites.

The technologies that may be used to collect Usage Information include the following:

**Cookies.** When you use our Sites, Carnegie Learning may store data in “cookies” or similar technology on your devices, which are data files placed on your computer or other device when you visit the Sites or otherwise access our online content. We use both session and persistent cookies (which remain on your computer after the browser has been closed). Carnegie Learning may use cookies for many purposes, including, without limitation, to collect information about how you use our Sites (including to track the pages you’ve visited), to remember you and your settings and your preferences, and to show you personalized content based on information we have collected or inferred about you, such as your school district and your academic interests. This information allows us to customize your Carnegie Learning experience so that your visit is as relevant and as valuable to you as possible.

For more information on cookies, visit <http://www.allaboutcookies.org>.

**Web Tags.** We may use web tags (small graphic images or other web programming code, also known as “1x1 GIFs” or “clear GIFs” or “pixels” or “beacons”) and similar technologies on our Sites and within our communications to you. Web tags can recognize certain types of information on your computer such as cookies, the time and date a page is viewed, and a description of the page where the web beacon is placed. Web tags or similar technologies may be used for a number of purposes by us and our third-party providers, including, without limitation, to count visitors to the Sites, to monitor how users navigate the Sites, to count how many e-mails that were sent were actually opened or links were actually viewed, to improve your experience on the Sites, or for marketing and targeted advertising purposes. Our web tags may collect some contact information (for example, the email address associated with an email message that contains a web tags).

**Embedded Scripts.** An embedded script is programming code that is designed to collect information about your interactions with the Sites, such as the links you click on. The code is temporarily downloaded onto your device from our web server or a third-party service provider, is active only while you are connected to the Sites, and is deactivated or deleted thereafter.



website analytics, to improve the Sites and our products and services, and to address functionality issues.

In addition, we may use a variety of other technologies that collect similar information for security and fraud detection purposes.

**Chat Boxes.** When you participate in our chat feature, Carnegie Learning can record and use your communications and the information you provide in order to assist you during the chat session, provide customer support, to improve our products and services, and for marketing purposes. If you do not consent, please do not continue with chat assistance.

### ***Information We Receive From Schools and School-Affiliated Third Parties***

We may receive information about you from Schools or from third parties as directed by Schools or made available through Schools. For example, your School may provide us your name and email address so that we may contact you, such as to send you information on how to register for an account. We may also receive information from your School to confirm that you are an educator or otherwise eligible to sign-up for an account. We may also collect information when you sign-in to use our Learning Platforms and interact with us directly through a separate third-party platform with whom your School has a relationship.

Your School is responsible for providing you notice of its own privacy policy(ies) that apply to the personal information we collect from or receive about you and your students through the Learning Platforms on behalf of the School. If you have questions on whether any alternative or supplemental terms apply to the collection, use, and sharing of your information, please contact your School. If you want to amend, remove, modify, or access information submitted to us by a School, please contact your School.

### ***Invite-a-Colleague Features***

You may choose to provide us names or other contact information for a colleague to enable them to create an account with the Sites. If you send a communication through the Sites, the information you provide (names, email addresses, etc.) is to facilitate the communication and is not used for other purposes, unless we obtain consent from that person. If you disclose any personal information relating to other people to us, you represent that you have the authority to do so and to permit us to use the information in accordance with this Privacy Policy.

### ***Social Media Features***

The Sites may permit you to interact with a third party platform (such as Google, Facebook, Instagram, Twitter, LinkedIn, and Pinterest) and the Sites, for example "liking" or "sharing" content from the Sites, posting your social media posts to the Sites, including a hashtag associated with us in your social media post, or creating an account or registering with the Service using existing login information from a third-party platform ("Social Media Features"). Also, both we and the third party may have access to certain information about you and your use of the Sites and the third-party service. These third-party social networking companies may collect information about your visit to our Sites through the Social Media Features we have integrated into the Service. Note that through the Social Media Features, these third-party social networking companies may be able to collect certain information about your visits to the Sites regardless of whether or not you affirmatively interact with the Social Media Features and whether or not you are logged into (or have) an account with the social networking company.

If you use Social Media Features, your interaction and personal information may be publicly disclosed on the Sites and on the third-party platform. If others give us access to their profile, page, or other content on a third-party platform, we may also receive information about you if it is accessible through that content. Your use of Social Media Features is subject to the [Terms of Use](#) for the Sites.

The information we collect in connection with Social Media Features is subject to this Privacy Policy; the information the third-party platform collects is subject to the third party's privacy practices (including whether the third party shares information with us, the types of information shared, and your choices about what is visible to others on the third-party platform).

### ***Information We Receive From Other Third Parties***

We may receive certain information about you from third parties. If you are on another website and agree to receive information from us, that site will forward your information to us so that we may contact you. We may validate or supplement that information with the information we collect with outside records from other third parties, such as public databases, publicly available social media or other web pages, joint marketing partners, and third parties who enhance the information we have about you. We use this information to respond to your requests, tailor content, offer you products or services that we believe may interest you, enhance our products and services, and for other business purposes. The information collected and stored by third parties is subject solely to the third party's privacy practices.

## **2. HOW DOES CARNEGIE LEARNING USE THE INFORMATION COLLECTED?**

**Carnegie Learning may use the information it collects for a number of purposes, including:**

- To allow you to participate in the Sites and Learning Platforms, such as to provide information you have requested and provide services in accordance with our agreements with Schools, including to process your registration (including verifying information you provide is active and valid) and to provide customer service
- To analyze and provide academic and learning outcomes based on students' use of the services;



- To tailor the content and advertising we display to you or others, on the Sites or elsewhere, as well as communications we send to you, and to analyze trends and statistics regarding use of the Sites;
- To analyze the performance and functioning of the Sites, including to test, correct and improve our content, applications and services;
- To develop new applications, products and services;
- To research how users interact with the Sites, conduct surveys, and to perform other market research;
- To manage Carnegie Learning's everyday business needs, such as administration and improvement of our Sites and related services;
- For other internal business and legal purposes, including investigation of information security and information asset protection-related incidents and to protect against fraud or other potentially illegal activities, to enforce our Terms of Use, to comply with all applicable laws and regulations and Carnegie Learning's corporate reporting obligations, and to enforce Carnegie Learning's agreements;
- For external academic research and scholarship.

### 3. WHEN DOES CARNEGIE LEARNING SHARE INFORMATION?

Carnegie Learning may share non-personal information, such as aggregate user statistics, de-identified or pseudonymized or hashed information (such as hashed email addresses), and Usage Information, with third parties in our discretion, including for targeted advertising purposes, unless prohibited by applicable law or our agreement with a School. For example, Carnegie Learning may provide other businesses and members of the public aggregated statistical data showing general usage patterns and statistics about our Sites, interactions, and transactions, or otherwise share non-personal information in its discretion, including for targeted advertising purposes.

Carnegie Learning does not share your personal information with unaffiliated third parties for their own direct marketing purposes without your consent. You may withdraw your consent to further data sharing at any time.

We may share the information we have collected about you (including personal information) in the circumstances described below or elsewhere in this Privacy Policy as disclosed at the time you provide information, or otherwise with your consent.

#### **Affiliates and Subsidiaries**

Carnegie Learning may share personal or other information among Carnegie Learning companies such as subsidiaries and affiliates, including for marketing purposes.

#### ***Companies Providing Services on our Behalf***

Carnegie Learning may share your information with third parties who perform services and functions on our behalf to support our interactions with you including, for example, by fulfilling information requests, administering surveys or contests, providing necessary technical services, or communicating with you. However, all such third parties have no independent rights to your information and are prohibited from using your information in any way that contradicts Carnegie Learning's privacy policy. Our third-party service providers may be located in the U.S., Canada or other foreign jurisdictions.

#### ***Schools and School-Affiliated Third Parties***

As discussed above, we provide the access to our Learning Platforms through agreements with Schools. Accordingly, Schools (and those who obtain authorized access from the Schools, including administrators) have access to all of the information we collect via registration and interactions with the Learning Platforms (including courses and videos viewed or used and how you interact with those courses and videos) by users associated with that School.

A School may also direct us to share information with a third party affiliated with the School. For example, you may be asked to sign-in to our Learning Platforms through a third-party platform with whom your School has a relationship. When you choose to sign-in through a third-party platform, data collected through your use of the Learning Platforms may be shared with those third parties.

We encourage you to read the privacy policies of the Schools and third-party platforms you use that may collect and use your information and the information that we share via registration and interactions with the Learning Platforms, as those parties have their own policies. Please contact us as detailed below if you have questions about which entities may be involved.

#### ***When You Agree to Receive Information from Third Parties or Direct That We Share Your Information***

We may share information when you direct us to do so. For example, you may be presented with an opportunity to receive marketing offers from a third party or you may engage with Social Media Features or other third-party applications or features, through which information about you is shared. Please note that we are not responsible for the privacy practices of third parties. If you later decide that you no longer want to receive communications from a third party, you will need to contact that third party directly.

#### ***Business and Legal Purposes***



activities against Carnegie Learning and others; support auditing, compliance, and corporate governance functions; test, correct, and improve our content, applications, and services; develop new applications, products, and services; analyze academic and learning outcomes and preferences; for external academic research and scholarship; comply with subpoenas, court orders, or similar legal processes, including from law enforcement agencies, regulators and courts; comply with any and all applicable laws; and we may also use Device Identifiers, including IP addresses, to identify users, and may do so in cooperation with copyright owners, Internet service providers, wireless service providers or law enforcement agencies in our discretion.

#### **Business Transfers**

Carnegie Learning may also share personal or other information in the event of an acquisition, reorganization or merger of Carnegie Learning or its assets, including, without limitation, during the course of any due diligence process, Carnegie Learning reserves the right to disclose and transfer all information related to the Sites, including personal information.

#### **Sweepstakes, Contests, and Promotions**

We may offer sweepstakes, contests or other promotions (any, a "Promotion"), that may require registration. By participating in a Promotion, you are agreeing to the provisions, conditions, or official rules that govern that Promotion, which may contain specific requirements of you (including, without limitation and except where prohibited by law, allowing the sponsor(s) of the Promotion to use your name, voice, likeness or other indicia of persona in advertising or marketing materials). If you choose to enter a Promotion, Personal Information may be disclosed to third parties or the public in connection with the administration of such Promotion, including, without limitation, in connection with winner selection, prize fulfillment, as required by law or permitted by the Promotion's terms or official rules (such as on a winners list).

### **4. THIRD-PARTY ADVERTISING AND ANALYTICS COMPANIES AND SIMILAR THIRD PARTIES**

Carnegie Learning works with third parties, such as analytics companies, network advertisers, ad agencies, and others who provide us with information about the Sites, users, and our advertisements, and who serve our advertisements on our Sites and elsewhere online. We and our third-party business partners collect certain information about your visits to and activity on our Sites and other websites and services, and may use this information to target advertising to you and others and to assess the effectiveness of our advertising. We may also share (or permit third parties to collect) certain information, such as Usage Information, aggregated or de-identified or hashed information, with these third parties for similar purposes.

These third parties may set and access their own tracking technologies on your device (including cookies and web tags) and may otherwise collect or have access to your personal information over time, including your visits to and activity on the Sites as well as other websites and online services, some of which may be personal information or personal data under various state laws.

**Your Advertising Choices:** Some of these third parties may be members of the Network Advertising Initiative ("NAI") or Digital Advertising Alliance ("DAA") Self-Regulatory Program for Online Behavioral Advertising. Both NAI and DAA provide information regarding procedures for opting-out of targeted online advertising from participating companies. For information from NAI about opting out, [click here](#). For information from DAA about opting out [click here](#). If you are a California resident, please see our ["California Privacy Notice"](#) for more information about your rights.

We also use Google Analytics, which uses cookies and other technologies to collect and analyze information about use of the Site and provide other reports. This service may also collect information regarding your use of other websites, apps, and online resources. For information about opting out from Google, [click here](#), and to download the Google Analytics opt-out browser add-on from Google, [click here](#).

### **5. SECURITY**

Carnegie Learning takes commercially reasonable steps to help protect and secure personal information. We have implemented an information security program with numerous measures, including administrative, technical and physical controls that are designed to reasonably safeguard information that can individually identify you against the loss, misuse and alteration of the information under our control. However, please remember that no data storage or data transmission over the Internet, or by other means, can be guaranteed to be 100% secure. Thus, while we strive to protect your personal data, Carnegie Learning cannot ensure or warrant the security of any information you transmit to us. Therefore, you understand, acknowledge, and agree that you transmit certain personal information to the Sites at your own risk.

### **6. THIRD PARTY LINKS OR CONTENT**

The Sites may contain links to other web sites or include other content hosted and served by third parties that Carnegie Learning does not control. The third parties whose content appears on the Sites may collect information about you through the use of cookies and web tags, may independently collect or solicit personal information, and may have the ability to track your use of their sites and services. Likewise, our content, including some of our Learning Platforms, may be provided through or be included on third parties' web pages and web sites that are not associated with Carnegie Learning and over which we have no control. We may collect Usage Information through Carnegie Learning content appearing on third party sites. Carnegie Learning is not responsible for the privacy practices of any third party.



## 7. CONSENT TO TRANSFER OF DATA

Carnegie Learning is a United States company. If you are a user of the Sites outside of the United States, by using the Sites and/or providing us with information, you acknowledge and agree that your personal information may be processed for the purposes identified in the Privacy Policy. In addition, we and our Canadian, US and other foreign service providers, may process your personal information in the country in which it was collected and in other countries, including the United States. By providing your information, you fully understand and unambiguously consent to this transfer, processing, and storage of your information in the United States and other jurisdictions, where laws regarding processing of personal information may be less stringent than the laws in your country, and where governments, courts or law enforcement or regulatory agencies in those other countries may be able to obtain disclosure of that personal information through the laws of those countries.

## 8. WHAT ARE YOUR CHOICES ABOUT YOUR INFORMATION?

**Access, Correction, and Deletion:** Members can access, correct, and delete certain information related to your use of our Sites by accessing your Carnegie Learning account. If you use our Learning Platforms through an agreement with a School and want to amend, remove, modify, or access information not otherwise available through your account, please contact your School.

Visitors to the Sites can also ask us to update your information by contacting us at [privacy@carnegielearning.com](mailto:privacy@carnegielearning.com). For users of the Learning Platforms, you may need consent from the applicable School to modify information we hold.

If you are a California resident, please see our [Notice to California Residents](#). Canadian residents please refer to the ["Notice for Canadian Residents"](#) section below for further details regarding your choices.

### **Marketing Messages from us**

- **Email:** You can unsubscribe from email by following the instructions contained within the email you receive from us. Members can also manage your communication settings in our Subscription Center when logged into your account: <https://discover.carnegielearning.com/Subscription-Center.html>. Note that we reserve the right to send you certain email or postal communications relating to your use of the Sites, announcements, notices of changes to this Privacy Policy or our other terms, or similar administrative or transactional messages, and these transactional messages may be unaffected if you choose to opt-out from marketing emails.
- **Text Messages:** If you sign up to receive SMS or MMS or RCS messages from Carnegie Learning, you may unsubscribe from any SMS or MMS or RCS messages received by replying "STOP".

## 9. CHANGES TO THIS PRIVACY POLICY

We ask that you periodically review our Privacy Policy to be sure you are familiar with the most current version. The Policy will state its effective date, which is the most recent date on which we revised the Policy.

To the extent allowed by applicable law and our agreement with a School, as applicable, Carnegie Learning reserves the right to make changes to our Privacy Policy at any time. Any changes will be effective upon posting, unless otherwise indicated. Your continued use of the Sites after the effective date of the revised Privacy Policy (or other act as specified in the revised Privacy Policy) will constitute your consent to those changes to the fullest extent allowed by applicable law. If we make material changes to the way we treat personal information we have previously collected about you, we will provide notice through the Sites and may also notify you in other ways, such as by email to your registered email address, in our discretion. However, we will not make material changes to how we treat previously collected personal information without your consent (opt-in or opt-out for adults and prior parental consent for Children), as required by law. You may need to consent to the new Privacy Policy in order to continuing using the Sites.

## 10. CONTACT US

For any questions about Carnegie Learning, our privacy policies, or to request review and/or removal of information collected by Carnegie Learning, please call us toll free at [1-888-851-7094](tel:1-888-851-7094) or contact us at:

Steve Sernett

Vice President of Legal and Corporate Counsel

Carnegie Learning, Inc.

4 Smithfield Street

8<sup>th</sup> floor

Pittsburgh, PA 15222

[privacy@carnegielearning.com](mailto:privacy@carnegielearning.com)



To report technical issues with the Site or apps, or to submit feature requests, please contact us using the appropriate form.

## 11. NOTICE FOR CANADIAN RESIDENTS

Please note, you may withdraw consent at any time (subject to legal or contractual restrictions and reasonable notice). Subject to certain limits set out in the applicable laws, Canadian residents also have the right to request access to the personal information that Carnegie Learning collects and to update or correct personal information if it is inaccurate. We may need to verify your identity before implementing your request.

Subject to applicable law, if you are a Canadian resident and would like to submit a request to access your personal information or to withdraw consent to the processing of your personal data, you must submit your request to Steve Sernett by sending an email to [privacy@carnegielearning.com](mailto:privacy@carnegielearning.com) or calling [1-888-851-7094](tel:1-888-851-7094). You may also use this contact to submit any requests for information on our privacy practices or to submit a complaint regarding our practices.

Your request or complaint must include your full name, street address, city, province, postal code, and an email address so that we are able to contact you if needed regarding this request.

We cannot properly process requests or complaints that do not come through the designated request mechanism or do not contain sufficient information to allow us to process your request. You may also be required to take reasonable steps as we determine from time to time in order to verify your identity and/or the authenticity of the request. Once your request is processed, absent exemptions, we will provide you with details regarding what personal information we have, how it is used, and with which third parties it is shared.

You and We confirm that it is our wish that this Privacy Policy, the Terms of Use, and all other related policies be drawn up in English. *Vous reconnaissez avoir exigé la rédaction en anglais du présent document ainsi que tous les documents qui s'y rattachent.*

## 12. NOTICE FOR UNITED KINGDOM/EUROPEAN/SWITZERLAND RESIDENTS

### Notice to Individuals Located in the United Kingdom (UK) and European Economic Area (EEA) and Switzerland

If you are a resident of the United Kingdom (UK), European Union or other EEA countries, or of Switzerland, the following information applies.

**Purposes of processing and legal basis for processing:** As explained above, we process personal information in various ways depending upon your use of our Sites. We process personal information on the following legal bases: (1) with your consent; (2) as necessary to perform our agreement to provide Sites; and (3) as necessary for our legitimate interests in providing the Sites where those interests do not override your fundamental rights and freedoms related to data privacy.

**Right to lodge a complaint:** Users that reside in the UK or EEA or Switzerland have the right to seek information and assistance or lodge a complaint about our data collection and processing actions with the supervisory authority where they reside. Contact details for data protection authorities are available here. **UK:** <https://ico.org.uk/>, **EEA:** [https://edpb.europa.eu/about-edpb/board/members\\_en](https://edpb.europa.eu/about-edpb/board/members_en), **Switzerland:** <https://www.edoeb.admin.ch/edoeb/en/home/the-fdpic/links/data-protection---switzerland.html>.

**Transfers:** Personal information we collect may be transferred to, and stored and processed in, the United States or any other country in which we or our affiliates or subcontractors maintain facilities. We ensure that transfers of personal information to a third country or an international organization are subject to appropriate safeguards as described in Article 45-49 of the GDPR.

**Withdraw consent:** If we have collected personal information with your consent, you have the right to withdraw that consent at any time.

**Access:** You have the right to request access to personal information we collected about you and information about its sources, purposes, and sharing.

**Correction:** You have the right to request that we correct the personal information we hold about you if it is inaccurate or incomplete.

**Erasure:** You have the right to request that we erase data we have collected from you. Please note that we may have a reason to deny your deletion request or delete data in a more limited way than you anticipated, e.g., because of a legal obligation to retain it.

**Portability:** You have the right, in certain circumstances, to request that we provide your personal information to you in a format that can be transferred to another entity.

**Restrict Processing:** You have the right, in certain circumstances, to request that we limit our processing of your personal information if you are (1) contesting the accuracy of your personal information, (2) asserting that our processing is unlawful; (3) asserting that we no longer need to keep the information for reasons related to the establishment, exercise, or defense of legal claims, or you object to our processing.

**Object:** You have the right to object to our processing if we are processing your personal information based on legitimate interests, using your personal information for direct marketing (including profiling), or processing your personal information for purposes of scientific or historical research and statistics.



**Verification Procedures:** We must verify your identity for everyone's protection, so we may require you to provide us with verification information prior to accessing any records containing personal information about you. We do this by:

- Asking you to provide personal identifiers we can match against information we may have collected from you previously and confirm your request using the email or telephone account stated in the request; or
- Having you submit your request through your account page, which will automatically verify your identity and will result in faster processing of your request.

We will use the information you provide for verification only for the purpose of verification. We may have a reason under the law why we do not have to respond to your request or respond to it in a more limited way than you anticipated. If we do, we will explain that to you in our response.

#### **Our Representative in the EEA:**

Rickert Rechtsanwaltsgesellschaft mbH

- Carnegie Learning, Inc. -

Colmantstraße 15

53115 Bonn

Germany

[Art-27-rep-carnegie@rickert.law](mailto:Art-27-rep-carnegie@rickert.law)

### 13. NOTICE TO RESIDENTS OF BRAZIL

If you are a resident of Brazil, the following information applies.

**Purposes of processing and legal basis for processing:** As explained above, we process personal information in various ways depending upon your use of our Sites. We process personal information on the following legal bases: (1) with your consent; (2) as necessary to perform our agreement to provide Sites; and (3) as necessary for our legitimate interests in providing the Sites where those interests do not override your fundamental rights and freedoms related to data privacy.

**Right to lodge a complaint:** Users that reside in Brazil have the right to seek information and assistance or lodge a complaint about our data collection and processing actions with the *Agência Nacional de Proteção de Dados*, "ANPD", [www.gov.br/anpd/pt-br](http://www.gov.br/anpd/pt-br).

**Transfers:** Personal information we collect may be transferred to, and stored and processed in, the United States or any other country in which we or our affiliates or subcontractors maintain facilities. We ensure that transfers of personal information to a third country or an international organization are subject to appropriate safeguards as described in Articles 33-36 of the *Lei Geral de Proteção de Dados Pessoais* (LGDP).

**Withdraw consent:** If we have collected personal information with your consent, you have the right to withdraw that consent at any time.

**Access:** You have the right to request access to personal information we collected about you and information about its use and sharing

**Correction:** You have the right to request that we correct the personal information we hold about you if it is inaccurate, incomplete, or outdated.

**Erasure:** You have the right to request that we erase data we have collected from you in some cases. Please note that we may have a reason to deny your deletion request or delete data in a more limited way than you anticipated, e.g., because of a legal obligation to retain it.

**Portability:** You have the right, in certain circumstances, to request that we provide your personal information to you in a format that can be transferred to another entity.

**Automated Decisionmaking:** You have the right to request information about a decision based solely on automated processing, including profiling, and request a review of such decisions.

**Verification Procedures:** We must verify your identity for everyone's protection, so we may require you to provide us with verification information prior to accessing any records containing personal information about you. We do this by:

Asking you to provide personal identifiers we can match against information we may have collected from you previously and confirm your request using the email or telephone account stated in the request; or

Having you submit your request through your account page, which will automatically verify your identity and will result in faster processing of your request.

We will use the information you provide for verification only for the purpose of verification. We may have a reason under the law why we do not have to respond to your request or respond to it in a more limited way than you anticipated. If we do, we will explain that to you in our response.



## IV. NOTICE TO CALIFORNIA RESIDENTS

### A. California Privacy Notice

**This California Privacy Notice is updated and effective as of January 3, 2024**

California consumers have certain privacy rights with respect to the personal information we collect. **If you are a California consumer with whom we have a direct business or potential business relationship, this section applies to you.**

This California Privacy Notice sets forth the disclosures and rights for California Consumers regarding their personal information, as required by the California Consumer Privacy Act of 2018 ("CCPA"), the California Privacy Rights Act of 2020 ("CPRA"), and any implementing regulations adopted thereunder. Terms (including defined capitalized terms) used in this California Privacy Notice have the same meanings given in the CCPA and CPRA and the associated regulations, unless otherwise defined.

#### EXERCISING YOUR CALIFORNIA RIGHTS

California consumers have the right to request: (1) that we disclose to you what personal information we collect, use, disclose, and sell, including the right to request that we provide to you the categories and specific pieces of personal information we have collected about you ("**Right to Know**"); (2) that we delete the personal information we have collected from you ("**Right to Delete**"); (3) that we correct inaccurate personal information we hold about you ("**Right to Correct**"), (4) to opt-out from the sharing of your personal information to a third party for cross-context behavioral advertising (i.e., targeted advertising) ("**Right to Opt-Out of Sharing**"), (5) and to opt-out from the sale of their personal information ("**Right to Opt-Out of Sale**"), all subject to the meanings and exceptions set forth in the CCPA and CPRA. More information on each of these rights is below.

In your request, you must provide enough information to allow us to verify you are the person about whom we collected personal information, or their authorized representative. You must also describe your request with enough detail so that we can understand, evaluate, and respond to it. We can't respond to your request if we can't verify your identity. Making such a request does not require you to create an account with us, and we will only use the information you provide in a request to verify your identity.

#### Verifying Your Requests

We will take reasonable steps to verify your identity based upon the information you provide and the type of request you are making.

When you exercise your Right to Know, Right to Delete, and/or Right to Correct Inaccurate Information, we may ask that you provide us with information, beyond your full name, in order to verify your identity and fulfill your request. If we are unable to verify that the individual submitting the request is the same individual about whom we have collected information (or someone authorized by that individual to act on their behalf), we will not be able to process the request.

#### Agents

If you are an authorized representative submitting a request on a user's behalf, please complete the applicable request per the instructions below. We will follow up to request a signed, written permission signed by the individual who is the subject of the request authorizing you to make the request on their behalf. The written permission must state your full legal name, the full legal name of the individual who is the subject of the request and needs to be clear about the permission granted. Alternatively, you may submit a copy of a power of attorney under Probate Code sections 4000-4465. In either case, please also indicate in your email the nature of your request. The consumer's identity, in addition to your own, will need to be independently verified in order for us to be able to fulfill your request. We may also ask the consumer to directly confirm with us that they provided you permission to submit a request. Please keep in mind that if we do not receive adequate proof that you are authorized to act on the consumer's behalf, we may deny the request.

#### Right to Know

California consumers have the right to know what information we have collected about you (the categories and the specific pieces of information).

If you are a California consumer with whom we have a direct business or potential business relationship and would like to exercise your Right to Know, please submit your request by emailing [privacy@carnegielearning.com](mailto:privacy@carnegielearning.com). In order to have us provide specific pieces of information, we may require a signed declaration under penalty of perjury that you are the consumer whose personal information is the subject of the request.

#### Right to Delete

California consumers have the right to request that we delete information we have collected from you. If you are a California consumer with whom we have a direct business or potential business relationship and would like to exercise your Right to Delete, please submit your request by emailing [privacy@carnegielearning.com](mailto:privacy@carnegielearning.com).

#### Right to Limit The Use and Disclosure of Sensitive Personal Information

Under the CPRA Regulations, a business must only provide the Right to Limit The Use and Disclosure of Sensitive Personal Information when sensitive personal information is not collected or processed for the purpose of inferring characteristics about a consumer, or does not fall under certain statutory exceptions, pursuant to CPRA §1798.121. Carnegie Learning's use and disclosure of sensitive personal information is not used for such purpose and/or falls within the statutory exceptions, and we therefore do not offer such this right at this time.





#### **Right to Opt-Out of Sharing**

California consumers have the right to opt-out of the sharing of your personal information to a third party for cross-context behavioral advertising (i.e., targeted advertising), whether or not for monetary or other valuable consideration. If you are a California consumer with whom we have a direct business or potential business relationship and would like exercise your Right to Opt-Out of Sharing, please submit your request by emailing [privacy@carnegielearning.com](mailto:privacy@carnegielearning.com).

#### **Right to Opt-Out of Sale**

California consumers have the right to opt-out of the sale of your personal information. If you are a California consumer with whom we have a direct business or potential business relationship and would like exercise your Right to Opt-Out of Sale, please submit your request by emailing [privacy@carnegielearning.com](mailto:privacy@carnegielearning.com).

#### **Other Important Information for Do Not Sell or Share**

Carnegie Learning engages in online advertising practices (and certain analytics or similar activities), which may be considered a "sale" or "share" for cross-context behavioral advertising as defined in the CCPA and CPRA. To disable sharing through cookies set by 3rd parties that may be considered "sales" or "sharing" under the CCPA and CPRA, click here: [Include a direct link to open the cookie manager and instructions.]In addition, the Digital Advertising Alliance ("DAA") also offers tools for California consumers to send requests under the CCPA and CPRA to opt out of the sale of personal information by some or all of the participating companies (<https://www.privacyrights.info>).

#### **Data Retention**

We will retain all categories of personal information described in this California Privacy Notice for as long as it is reasonably necessary for the purposes set out in this California Privacy Notice, considering the time period reasonably necessary to: provide the Sites to you; exercise the choices and rights you have requested; comply with our contractual obligations; enforce our terms for use of the Sites; and, comply with legal and regulatory requirements. Except as noted differently on specific pages or apps, we retain your personal information while you have an account with us, or while you are using our Sites or continuing to visit us.

#### **Users Younger than 16**

Carnegie Learning does not knowingly sell or share personal information of users younger than 16.

#### **Right to Non-Discrimination for the Exercise of Privacy Rights**

California consumers have the right to not receive discriminatory treatment for exercising CCPA and CPRA rights. We will not discriminate against you for exercising your CCPA and CPRA rights.

#### **Do Not Track**

Some browsers incorporate a 'Do Not Track' (DNT) feature that, when turned on, signals to websites and online services that you do not wish to be tracked. Because there is not yet an accepted standard for how to respond to browser DNT signals, we do not currently respond to them.

#### **PERSONAL INFORMATION WE COLLECT**

The personal information we collect about you will depend upon how you use the Carnegie Learning Site and Learning Platform or otherwise interact with us. Accordingly, we may not collect all of the below information about you.

In addition to the below, we may collect and/or use additional types of information and will do so after providing notice to you and obtaining your consent to the extent such notice and consent is required by the CCPA and CPRA.



Category of Personal Information Collected	from which the Information was Collected	Business or Commercial Purpose(s) for which Information is Collected	whom this type of Personal Information is Disclosed for a Business Purpose	Personal Information is Sold or Shared for Cross Contextual Behavioral Advertising
<p><b>Identifiers</b> (such as name, email address, contact information, IP address)</p>	<p>We may collect this type of information from:</p> <ul style="list-style-type: none"> <li>• You,</li> <li>• Affiliated Companies,</li> <li>• School/Education Institution Customers,</li> <li>• Third party business partners,</li> <li>• Cookies and Tracking Technologies</li> </ul>	<p>We may use this type of information to:</p> <ul style="list-style-type: none"> <li>• to provide access to our products and services, or to provide quotes or offers for, and updates about, our products and services;</li> <li>• to send a confirmation notice to the Registrant of the registration;</li> <li>• to administer and manage accounts, including password resetting, responding to questions raised by Registrants, to contact the Registrant about any problems with the Registrant's account or conduct on the Site;</li> <li>• to send out notifications or emails about the Site including information about current events, changes, improvements, upgrades, and rules of the Site;</li> <li>• for administrative, planning, product or service development, quality control and research purposes relating to our products and services;</li> <li>• or marketing purposes, but only where we have express or implied consent to contact someone or we are otherwise permitted by law to do so. Registrants may also opt out at any time by following the specific opt out instructions within the communications that we send;</li> <li>• to comply with the law and protect us, our consumers or the general public;</li> <li>• for other purposes described to you at the time of collection or otherwise with your consent or as consistent with this Privacy Policy.</li> </ul>	<p>We may disclose this type of information to:</p> <ul style="list-style-type: none"> <li>• Subsidiaries and Affiliates</li> <li>• School/Education Institution Customers</li> <li>• Service Providers,</li> <li>• Third parties or affiliated companies when you agree to or direct that we share your information with them.</li> <li>• Third parties who may acquire your information as a result of a merger, acquisition or otherwise ownership transition.</li> <li>• Law enforcement, government entities, or others if required by law or in connection with court proceedings (such as pursuant to subpoenas or court orders);</li> <li>• Third parties we partner with for contests, sweepstakes, or promotions,</li> <li>• Third party advertising and analytics companies</li> </ul>	<p>Third party advertising, analytics, and other similar marketing business partners may have access to this data, and this may be considered a "sale" or "share" under the CCPA and CPRA under certain circumstances.</p>



Category of Personal Information Collected	from which the Information was Collected	Business or Commercial Purpose(s) for which Information is Collected	whom this type of Personal Information is Disclosed for a Business Purpose	Personal Information is Sold or Shared for Cross Contextual Behavioral Advertising
<p><b>Any categories of Personal Information described in subdivision (v) of Section 1798.140</b> (such as name, signature, address, phone number, and other categories of information classified as “personal” under this California law) Note: information in this category may overlap with other categories.</p>	<p>We may collect this type of information from:</p> <ul style="list-style-type: none"> <li>• You,</li> <li>• Affiliated Companies,</li> <li>• School/Education Institution Customers,</li> <li>• Third party business partners,</li> <li>• Cookies and Tracking Technologies</li> </ul>	<p>We may this this type of information to:</p> <ul style="list-style-type: none"> <li>• to provide access to our products and services, or to provide quotes or offers for, and updates about, our products and services;</li> <li>• to send a confirmation notice to the Registrant of the registration;</li> <li>• to administer and manage accounts, including password resetting, responding to questions raised by Registrants, to contact the Registrant about any problems with the Registrant’s account or conduct on the Site;</li> <li>• to send out notifications or emails about the Site including information about current events, changes, improvements, upgrades, and rules of the Site;</li> <li>• for administrative, planning, product or service development, quality control and research purposes relating to our products and services;</li> <li>• for marketing purposes, but only where we have express or implied consent to contact someone or we are otherwise permitted by law to do so. Registrants may also opt out at any time by following the specific opt out instructions within the communications that we send;</li> <li>• to comply with the law and protect us, our consumers or the general public;</li> <li>• for other purposes described to you at the time of collection or otherwise with your consent or as consistent with this Privacy Policy.</li> </ul>	<p>We may disclose this type of information to:</p> <ul style="list-style-type: none"> <li>• Subsidiaries and Affiliates</li> <li>• School/Education Institution Customers</li> <li>• Service Providers,</li> <li>• Third parties or affiliated companies when you agree to or direct that we share your information with them.</li> <li>• Third parties who may acquire your information as a result of a merger, acquisition or otherwise ownership transition.</li> <li>• Law enforcement, government entities, or others if required by law or in connection with court proceedings (such as pursuant to subpoenas or court orders);</li> <li>• Third parties we partner with for contests, sweepstakes, or promotions,</li> <li>• Third party advertising and analytics companies</li> </ul>	<p>Third party advertising, analytics, and other similar marketing business partners may have access to this data, and this may be considered a “sale” or “share” under the CCPA and CPRA under certain circumstances.</p>



Category of Personal Information Collected	from which the Information was Collected	Business or Commercial Purpose(s) for which Information is Collected	whom this type of Personal Information is Disclosed for a Business Purpose	Personal Information is Sold or Shared for Cross Contextual Behavioral Advertising
<p><b>Audio, electronic, visual, thermal, olfactory, or similar information</b></p> <p>This category includes, for example, images, video, or audio recordings.</p>	<p>We may collect this type of information from:</p> <ul style="list-style-type: none"><li>• You</li><li>• Affiliated Companies</li><li>• School/Education Institution Customers</li><li>• Third party business partners</li></ul>	<p>We may use this type of information to:</p> <ul style="list-style-type: none"><li>• to provide access to our products and services, or to provide quotes or offers for, and updates about, our products and services;</li><li>• for administrative, planning, product or service development, quality control and research purposes relating to our products and services;</li><li>• for marketing purposes, but only where we have express or implied consent to contact someone or we are otherwise permitted by law to do so. Registrants may also opt out at any time by following the specific opt out instructions within the communications that we send;</li><li>• to comply with the law and protect us, our consumers or the general public;</li><li>• for other purposes described to you at the time of collection or otherwise with your consent or as consistent with this Privacy Policy.</li></ul>	<p>We may disclose this type of information to:</p> <ul style="list-style-type: none"><li>• Subsidiaries and Affiliates</li><li>• School/Education Institution Customers</li><li>• Service Providers,</li><li>• Third parties or affiliated companies when you agree to or direct that we share your information with them.</li><li>• Third parties who may acquire your information as a result of a merger, acquisition or otherwise ownership transition.</li><li>• Law enforcement, government entities, or others if required by law or in connection with court proceedings (such as pursuant to subpoenas or court orders);</li><li>• Third party advertising and analytics companies</li></ul>	<p>We do not sell or share this category of information.</p>



Category of Personal Information Collected	from which the Information was Collected	Business or Commercial Purpose(s) for which Information is Collected	whom this type of Personal Information is Disclosed for a Business Purpose	Personal Information is Sold or Shared for Cross Contextual Behavioral Advertising
<p><b>Inferences drawn from any of the information identified above to create a profile about You</b></p> <p>(such as preferences, characteristics, predispositions and behaviors)</p>	<p>We may collect this type of information from:</p> <ul style="list-style-type: none"> <li>You,</li> <li>Affiliated Companies,</li> <li>School/Education Institution Customers,</li> <li>Third party business partners,</li> <li>Cookies and Tracking Technologies</li> </ul>	<p>We may use this type of information to:</p> <ul style="list-style-type: none"> <li>to provide access to our products and services, or to provide quotes or offers for, and updates about, our products and services;</li> <li>to send a confirmation notice to the Registrant of the registration;</li> <li>to administer and manage accounts, including password resetting, responding to questions raised by Registrants, to contact the Registrant about any problems with the Registrant's account or conduct on the Site;</li> <li>to send out notifications or emails about the Site including information about current events, changes, improvements, upgrades, and rules of the Site;</li> <li>for administrative, planning, product or service development, quality control and research purposes relating to our products and services;</li> <li>for marketing purposes, but only where we have express or implied consent to contact someone or we are otherwise permitted by law to do so. Registrants may also opt out at any time by following the specific opt out instructions within the communications that we send;</li> <li>to comply with the law and protect us, our consumers or the general public;</li> <li>for other purposes described to you at the time of collection or otherwise with your consent or as consistent with this Privacy Policy.</li> </ul>	<p>We may disclose this type of information to:</p> <ul style="list-style-type: none"> <li>Subsidiaries and Affiliates</li> <li>School/Education Institution Customers</li> <li>Service Providers,</li> <li>Third parties or affiliated companies when you agree to or direct that we share your information with them.</li> <li>Third parties who may acquire your information as a result of a merger, acquisition or otherwise ownership transition.</li> <li>Law enforcement, government entities, or others if required by law or in connection with court proceedings (such as pursuant to subpoenas or court orders);</li> <li>Third parties we partner with for contests, sweepstakes, or promotions,</li> <li>Third party advertising and analytics companies</li> </ul>	<p>Third party advertising, analytics, and other similar business partners may have access to this data, and this may be considered a "sale" or "share" under the CCPA and CPRA under certain circumstances.</p>

#### QUESTIONS AND CONTACT INFORMATION

If you have questions about any of these rights, please email [privacy@carnegielearning.com](mailto:privacy@carnegielearning.com)

#### B. California's Shine the Light Law

Carnegie Learning does not share personal information with third parties for the third parties' direct marketing purposes without your specific consent (opt-in or opt-out).

## Connect With Us



4 Smithfield Street, Floor 8  
Pittsburgh, PA 15222  
P: [888.851.7094](tel:888.851.7094)

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# Student Privacy Policy

## CARNEGIE LEARNING STUDENT PRIVACY POLICY

Updated and Effective: October 31, 2022

This Privacy Policy applies to the collection of information from students by Carnegie Learning, Inc. ("Carnegie Learning") through access-controlled learning platforms we provide, including through any related websites, software, applications, or interactive features or online services, and that post a link to or include this Privacy Policy (collectively, our "Learning Platforms"). This Privacy Policy also applies to any student information we collect offline in connection with use of the Learning Platforms.

### OVERVIEW

The Learning Platforms include teaching and learning resources designed for students in pre-K through college. Typically students will access the Learning Platforms through agreements Carnegie Learning has with teachers, or representatives of schools, learning institutions, school districts, state or local boards of education or other educational organizations (collectively, "Schools").

The Learning Platforms are made available to students and others authorized by the Schools, who have been provided access by the Schools, such as by adding a student's name and email address to their class roster or by syncing class rosters through third-party services authorized by a School. Teachers or administrators may also provide other information to us about their students who participate in the Learning Platforms. We may also disclose information to the Schools pursuant to our agreements with the Schools. When we provide access to the Learning Platforms through a School agreement, we collect, process, disclose, and store student information in order to provide learning services through the Learning Platforms and on behalf of Schools and only in the ways permitted by the applicable School agreement. We otherwise use information as set forth in this policy.

Certain students may obtain access through Private Providers. If you are accessing the Learning Platforms through a Private Provider, [please see below for additional information](#).

### **Students Younger than 13**

Some students that access our Learning Platforms may be younger than the age of 13 ("Children") and the online collection of personal information from those students may therefore be subject to the Children's Online Privacy Protection Act ("COPPA") and other applicable law. Carnegie Learning collects personal information about Children for the use and benefit of Schools, and for no other commercial purpose. When a School provides access to the Learning Platforms to students who are Children, the School represents that it has secured all necessary consent from the parents of those Children or is providing that consent on the parents' behalf. We limit the use of information about Children to the educational context authorized by the contracting School. If you are the parent of a Child who uses our Learning Platforms through his/her/their School and have questions about our privacy practices, please contact us as indicated in the "[Contact Us](#)" section below.

### **What Information Do We Collect from Students?**

We may collect information from you directly, automatically when you visit the Learning Platforms, and sometimes from third parties, such as your teacher or School administrator. Some of this information may be considered "personal information" under various applicable laws. We consider information that identifies you as a specific, identified individual (such as your name and email address) to be personal information. We will also treat additional information, including IP addresses and cookie identifiers, as "personal information" where required by applicable law. Note that we may de-identify personal information so that it is non-personal, such as aggregating or converting it to a code, sometimes using a function commonly known as "hash". We will treat de-identified information as non-personal to the fullest extent allowed by applicable law. If we combine non-personal information with personal information, then we will treat the combined information as personal information under this Privacy Policy.

#### ***Information collected directly from students***

Carnegie Learning may ask you to provide certain information to us directly, depending on which product(s) you are using, including:

- Full Name
- Date of Birth
- Email address
- Student identifier
- Student login ID and password (unique to our system)
- The grade, class, school where a student is enrolled, and any relevant programs such as English Language Learner (ELL) or English as a Second Language (ESL) or Special Education



- Feedback about any of our products and services
- Records of interactions with customer support
- Data generated from student activity within the Learning Platforms, including answers provided, errors, hint requests, preferences, timing information, progress within the system, and inferences made from this data about student knowledge.
- External assessment scores used to customize instruction

#### **Information collected automatically through use of the Learning Platforms**

In addition to any personal information that you choose to submit to the Learning Platforms, we and our third-party service providers may use a variety of technologies that automatically or passively collect certain information whenever you visit or interact with the Learning Platforms ("Usage Information"). Usage Information may include the following, among other information:

- Web browser type and version
- Operating system
- All pages and activities viewed on the Learning Platforms
- Date and time of use
- Length of stay on certain courses or pages
- We also automatically collect your IP address or other unique identifier ("Device Identifier") for any computer, mobile phone or other device you may use to access the Learning Platforms. A Device Identifier is a number that is automatically assigned to your device used to access the Learning Platforms, and our servers identify your device by its Device Identifier. We may be able to collect or infer your approximate location through information we collect, such as IP address.

Any Usage Information, Device Identifier, or other persistent identifier we collect is used for the sole purposes of providing our Learning Platforms to students and their Schools and to support the Learning Platforms' internal operations.

The technologies that may be used to collect Usage Information include the following:

**Cookies.** When you use our Learning Platforms, Carnegie Learning may store data in "cookies" or similar technology on your devices, which are data files placed on your computer or other device when you visit the Learning Platforms or otherwise access our online content. Carnegie Learning may use cookies for many purposes, including, without limitation, to remember you and your preferences, to collect information about how you use our Learning Platforms, personalize content within the Learning Platforms, and track the pages you've visited. We use both session and persistent cookies (which remain on your computer after the browser has been closed). This information allows us to customize your Carnegie Learning experience so that your visit is as relevant and as valuable to you as possible.

For more information on cookies, visit <http://www.allaboutcookies.org>.

**Web Beacons.** We may use web beacons (small graphic images or other web programming code, also known as "1x1 GIFs" or "clear GIFs") and similar technologies on our Learning Platforms. Web beacons can recognize certain types of information on your computer such as cookies, the time and date a page is viewed, and a description of the page where the web beacon is placed. Web beacons or similar technologies may be used for a number of purposes, including, without limitation, to count visitors to the Learning Platforms, to monitor how users navigate the Learning Platforms, to count how many e-mails that were sent were actually opened or links were actually viewed and to improve your experience on the Learning Platforms.

**Embedded Scripts.** An embedded script is programming code that is designed to collect information about your interactions with the Learning Platforms, such as the links you click on. The code is temporarily downloaded onto your device from our web server or a third party service provider, is active only while you are connected to the Learning Platforms, and is deactivated or deleted thereafter.

In addition, we may use a variety of other technologies that collect similar information for security and fraud detection purposes.

#### **Information We Receive from Schools**

We may receive information about you from your School(s). For example, the School may provide us your name and email address to set up an account on your behalf and/or so that we may contact you, such as to send you an invitation to create a password and log-in. The School may also provide us with your parent or legal guardian's email address and phone number, such as to communicate with them about the Learning Platforms, including to send course reminders and ask for feedback about our products and services. The information we collect is subject to this Privacy Policy. The information collected and stored by a School remains subject to the School's privacy practices.

#### **How Does Carnegie Learning Use Information Collected about Students?**

- Allow students to access and use the service as designated by the School
- Help students reset their passwords
- Investigate information security and information asset protection-related incidents





- Analyze academic and learning outcomes and preferences
- Personalize the teaching and learning resources available across the Learning Platforms to improve student instruction and meet individual student needs
- Allow students to participate in features or activities we offer, including sweepstakes, contests, or other prize promotions
- Communicate with and provide reports to you, your parents or legal guardians, teachers or School or school district administrators at the student, class, School, or district level, or as otherwise directed by the School, based on your use of and activities on the Learning Platforms, including reminders and other informational messages
- Support teachers or School or school district administrators in implementing our products or using our services
- Monitor the use of our products and perform such analyses as might be necessary or helpful in improving product performance, efficiency, and security
- Research how students use the Learning Platforms and analyze the educational effectiveness of our products and services to contribute to general knowledge about how students learn
- For external academic research and scholarship
- Enforce our Terms of Use
- Use the information as may be required or permitted by legal, regulatory, industry self-regulatory, insurance, audit or security requirements.

Carnegie Learning will not use any information collected about students to advertise or market to students or their parents.

### **How Does Carnegie Learning Share Information Collected about Students?**

#### ***To And On Behalf Of Schools***

As discussed above, we provide the Learning Platforms to students through agreements with Schools and on behalf of those Schools. Accordingly, Schools (and those who obtain authorized access from the Schools) and have access to all of the information we collect via registration and the Learning Platforms from students associated with that School.

In some cases, a School (including teachers or administrators) may enter into additional reporting or research agreements for the provision of reports or analyses that require data to be associated with demographic categories (gender, ethnicity, free or reduced lunch status, etc.) or other individual student information, such as test scores. In such cases, the teachers, Schools and/or school district administrators provide Carnegie Learning and specified service providers with the information required, which may personally identify students. When such agreements are in place, reports containing student information are provided only to the teachers, Schools and school district administrators authorized to receive that information. In such cases, data is held securely and only Carnegie Learning employees and service providers directly involved in producing these reports have access to students' personal information.

#### ***Service Providers***

In order to provide and support our products, Carnegie Learning may contract with third parties and share information required to carry out these services with these third parties. These service providers provide support services, such as hosting the Learning Platforms and operating their features, or performing other administrative services. In such cases, all third parties are required to abide by this policy. Carnegie Learning takes reasonable steps to release personal information collected from students only to service providers and third parties who are capable of and have agreed to maintain the confidentiality and security of that information and to use that personal information only to provide the applicable service to us or on our behalf. You may view a list of our current service providers here: [Link](#)

#### ***Administrative and Legal Reasons***

We may disclose personal information about students to third parties when necessary to protect the security or integrity of the Learning Platforms; take precautions against liability; respond to judicial process; or provide information to law enforcement agencies or for an investigation on a matter related to public safety. We may also disclose personal information about students in connection with a merger or the sale of Carnegie Learning's assets or interest in the Learning Platforms, or other similar change in ownership (including, during the course of any due diligence process), provided that any subsequent owner of student's personal information has agreed to abide by Carnegie Learning's then-current student privacy policy.

#### ***Research and Statistical Purposes***

Carnegie Learning uses de-identified and aggregate data about students' use of our Learning Platforms for product development, research or other purposes. To de-identify data, we remove all direct and indirect personal identifiers. These identifiers include, but are not limited to, name, ID number, birth date, teacher name, class and school identifications. Carnegie Learning agrees not to attempt to re-identify any de-identified data, and to restrict any third parties to whom it discloses such data from attempting to re-identify any de-identified data. We may store de-identified data indefinitely. Schools, school districts, and individuals may ask for their data to be excluded from any de-identified data sets. To request such exclusion, please email [privacy@carnegielearning.com](mailto:privacy@carnegielearning.com).

In addition, for research and other purposes, Carnegie Learning may transfer de-identified data to third parties. For example, we may share information such as problems attempted, answers or hint requests for each step of the problem, and associated time stamps. We review all requests for such de-identified data sets, and we require all recipients of de-identified data sets to agree to the [Carnegie Learning Private Dataset Terms of Use](#), which prohibit, among other things, any attempts to re-identify the de-identified data and any commercial use of the data.



Review Board (IRB) which is responsible for approving the goals and procedures of the study, including those related to maintaining privacy of information. The IRB may or may not require parental or student notification or approval. Schools or school districts provide prior consent to any research that involves interaction with the schools and their students' information. Carnegie Learning is committed to abiding by IRB recommendations and requirements.

As part of our commitment to continual improvement, Carnegie Learning may field test new application content and test versions of features within our products, including through studies which employ random assignment. We may also partner with third-party researchers to conduct such research. If the research is not exempt from IRB review, an Institutional Review Board (IRB) will review the goals and procedures of the study, including those related to maintaining privacy of information.

### ***Sweepstakes, Contests, and Promotions***

We may offer sweepstakes, contests or other promotions (any, a "Promotion"), that may require registration. By participating in a Promotion, you are agreeing to the provisions, conditions, or official rules that govern that Promotion, which may provide for the sharing of information collected in connection with the Promotion beyond those instances described elsewhere in this Privacy Policy.

### **Third-Party Analytics Services**

We may work with analytics providers to provide us with information regarding the use of our Learning Platforms. These third parties may set and access their own tracking technologies on your devices (including cookies and web beacons), and they may otherwise collect or have access to information about you, including Usage Information. With respect to Children, to the extent there is any collection of information through tracking technologies, it is used only for providing support for internal operations as needed to provide the Learning Platforms.

### **Data Retention & Access**

You may be able to review, modify, and delete certain information related to your use of our Learning Platforms through your account. Schools may ask to review the information that Carnegie Learning has collected and retained about a particular student, or request its deletion, by contacting us at [privacy@carnegielearning.com](mailto:privacy@carnegielearning.com). If you are a parent or student and would like to access or request deletion of any information collected by Carnegie Learning as a result your or your student's use of our Learning Platforms, please contact your School

Carnegie Learning will retain personal information about students as long as required by our agreement with a School or as required by law. Carnegie Learning may otherwise retain personal information as required by applicable law or its contractual obligations to a School. Carnegie Learning may also delete personal information or other data when requested by a School or as provided under a School agreement. The School may request a copy of the data or that we retain the data on their behalf by emailing their request to [privacy@carnegielearning.com](mailto:privacy@carnegielearning.com) within 60 days of such notification.

Unless otherwise prohibited by an agreement with a School, Carnegie Learning may retain aggregated, de-identified, or other non-personal data, including curriculum or other content submitted by users when using the Learning Platforms as long as needed for our business purposes.

### **Security**

Carnegie Learning takes commercially reasonable steps to help protect and secure personal information. We have implemented an information security program with numerous measures, including administrative, technical and physical controls that are designed to reasonably safeguard personal information under our control against loss, misuse and unauthorized alteration. However, please remember that no data storage or data transmission over the Internet, or by other means, can be guaranteed to be 100% secure. Thus, while we strive to protect your personal data, Carnegie Learning cannot ensure or warrant the security of any information you transmit to us. Therefore, each School and any student user accessing the Learning Platforms under the School's authorization understands, acknowledges, and agrees that you transmit personal information to the Learning Platforms at your own risk.

### **Third-Party Links or Content**

The Learning Platforms may contain links to other web sites or include other content hosted and served by third parties that Carnegie Learning does not control. Likewise, our content, including some of our Learning Platforms, may be provided through or be included on third parties' web pages and web sites that are not associated with Carnegie Learning and over which we have no control. We may collect Usage Information through Carnegie Learning content appearing on third-party sites. Carnegie Learning is not responsible for the privacy practices of any third party.

### **Consent to Transfer of Data**

Carnegie Learning is a United States company. If you are a user of the Learning Platforms outside of the United States, by using the Learning Platforms and/or providing us with information, you acknowledge and agree that your personal information may be processed for the purposes identified in the Privacy Policy. In addition, your personal information may be processed in the country in which it was collected and in other countries, including the United States. By providing your information, you fully understand and unambiguously consent to this transfer, processing, and storage of your information in the United States and other jurisdictions, where laws regarding processing of personal information may be less stringent than the laws in your country, and where governments, courts or law enforcement or regulatory agencies in those other countries may be able to obtain disclosure of that personal information through the laws of those countries.

### **Contact Us**



Carnegie Learning, Inc.

4 Smithfield Street, Floor 8

Pittsburgh, PA 15222

[privacy@carnegielearning.com](mailto:privacy@carnegielearning.com)

(877) 401-2527

### **Accessing the Learning Platforms through Private Provider**

The Learning Platforms may be made available through agreements we have with organizations who provide specialized education services to students, but who are not directly associated with a School ("Private Provider"). In those cases, we or the Private Provider (rather than the School) will obtain any necessary consent from a student's parent or legal guardian as required by law.

When students access the Learning Platforms through a Private Provider, Carnegie Learning acts as a service provider on behalf of and in the ways permitted by the agreement with the Private Provider. Accordingly, Private Providers may have access to all of the information we collect from students that is associated with the students' accounts with the Private Provider. If a Private Provider is working in connection with a student's School, they may share or ask us to share student information about students associated with that School.

If you are the parent of a Child who uses our Learning Platforms through a Private Provider and have questions about our privacy practices, or would like to request to access or delete your Child's information, please contact us as indicated in the "[Contact Us](#)" section above. If you would like more information about how the Private Provider handles your personal information, please contact the Private Provider.

### **Information for California Residents**

Carnegie Learning collects personal information from users of the Learning Platforms as a service provider on behalf of and only in the ways permitted by the applicable School agreement. Carnegie Learning does not sell personal information collected through the Learning Platforms or share that information with third parties for their own direct marketing purposes. If you are a California consumer and would like to submit a request to access or delete information under the California Consumer Privacy Act (CCPA), please direct your request to your School administrator.

## Connect With Us

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P: [888.851.7094](tel:888.851.7094)



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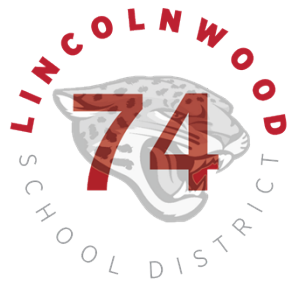
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## Executive Summary Finance Committee Meeting

DATE: March 21, 2024

TOPIC: Middle School Science Curriculum Adoption – © 2024 Amplify Education, Inc.

PREPARED BY: Dominick Lupo

### **Recommended for:**

- Action
- Discussion
- Information

### **Purpose/Background:**

The Board of Education approves all curricular adoptions and contracts.

The Science Committee met throughout the 2023-2024 school year to discuss program implementation. The three middle school science teachers sampled several programs including Amplify Science. The staff responded positively to the structures and materials presented by the Amplify representatives. Teachers feel that Amplify Science would be engaging for students, and it appeared that amount of material was appropriate for each grade level.

Much like the Mystery Science experience that students get as a part of our kindergarten through fifth grade science programming, Amplify Science is a curriculum that blends hands-on investigations, literacy-rich activities, and interactive digital tools to empower students to think, read, write, and argue like real scientists. The learning experiences, lessons, and materials offered by Amplify Science presented as being meaningful and authentic to the topics being explored, and committee members were unanimous in their support of the Amplify program.

In addition to the materials and subscriptions, the team, along with administration, is looking to secure a solid initial professional development plan from Amplify Science. This will include one, full-day initial implementation workshop to be delivered on-site. There is the option of a virtual professional development workshop, but the administration feels that a hands-on, in-person workshop would be the best course of action given the tactile nature of the program.

District Legal Counsel reviewed Amplify's terms and conditions and offered an amendment which Amplify signed without any edits.

**Fiscal Impact:**

The fiscal impact of the 6-year adoption will be \$67,710.20 for all materials and professional development. This grant will be paid for using the funds from the Targeted School Improvement grant as this program will be a resource to increase students' access to informational texts.

**Recommendation:**

The Finance Committee concurs with the Administration's recommendation to the Board of Education to approve this Agreement from Amplify Education for the middle school science curriculum in the amount of \$67,710.20 from the 2024-2025 school year until the 2029-2030 school year.

# Customer Privacy Policy

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Last Modified: June 30, 2023

*Update 6/30/2023: This Privacy Policy has been updated to address new state law data privacy requirements.*

We advise you to read this Privacy Policy in its entirety, including the jurisdiction-specific provisions in the appendix. Ou

## Customer Privacy Policy: K–12 Schools

### Who We Are

Amplify Education, Inc. (“**Amplify**”) is leading the way in next-generation curriculum and assessment. Amplify’s programs provide teachers with powerful tools that help them understand and respond to the needs of each student and use data in a way that is safe, secure, and effective.

### Our Products and Services

Amplify’s products support classroom instruction and learning and include Amplify CKLA, Amplify ELA, Amplify Science, Amplify Desmos Math, Desmos Math, Boost Reading, Boost Math, mCLASS, Mathigon, services at [teacher.desmos.com](https://teacher.desmos.com) (for creating and assigning activities) and [student.desmos.com](https://student.desmos.com) (for use of the activities or curricula as directed by an instructors), and any other product or service that links to this Privacy Policy (together, the “**Products**”).

Our Products are primarily geared towards K–12 students, educators, and staff who use the Products pursuant to an agreement or with the permission of School Districts and State Agencies (“**Authorized School Users**”). We also provide limited opportunities for teens and parents on behalf of children under 13 (“**Child Users**”) to sign up for an account for at-home use of our Products. See the Appendix for additional information for users of our at-home use of our Products.

### What This Privacy Policy Covers

This Customer Privacy Policy (“**Privacy Policy**”) describes how Amplify collects, uses, and discloses personal information through the provision of Products.

For purposes of this Privacy Policy, “**you**” and “**your**” means Authorized Users.

For additional information that applies to the Product(s) that are designed for home use, visit the Appendix–Supplemental Disclosures of this Privacy Policy.

This Privacy Policy does not apply to Amplify’s handling of:

- information collected from users of [Amplify’s company website](#), which is governed by our [Website Privacy Policy](#).
- applicant data that we process in accordance with our applicant privacy notice.

There may be different contractual terms or privacy policies in place with some of our School Customers. Such other terms or policies may supersede this Privacy Policy for information collected or released under those terms. If you have any questions as to which legal agreement or privacy policy controls the collection and use of your personal information, please contact us using the information provided below. Unless expressly superseded, this Privacy Policy is incorporated into and is subject to the Agreement that governs your use of the Products.

**Our Approach to Student Data Privacy:** In the course of providing the Products to our School Customers and their Authorized School Users, Amplify collects, receives, generates, or has access to “**Student Data,**” which is information that directly relates to an identifiable student.

We consider Student Data to be confidential and we collect and use Student Data solely for educational purposes in connection with providing our Products to, or on behalf of, our School Customers, as described in this Privacy Policy and our Agreements. We work to maintain the security and confidentiality of Student Data that we collect or store, and we enable our School Customers to control the use, access, sharing, and retention of Student Data.

Our collection and use of Student Data is governed by our Agreements with our School Customers, including this Privacy Policy, and applicable laws which may include the federal Family Educational Rights and Privacy Act of 1974 (“**FERPA**”), the Children’s Online Privacy Protection Act (“**COPPA**”), the Protection of Pupil Rights Amendment (“**PPRA**”), as well as other applicable federal, state, and local privacy laws and regulations (“**Applicable Laws**”). With respect to FERPA, Amplify receives Student Data as a “school official” under Section 99.31 of FERPA for the purpose of providing its Products, and such Student Data is owned and controlled by the School Customer.

Amplify is also an early adopter and proud signatory of the [Student Privacy Pledge](#), an industry-wide pledge to safeguard privacy and security of Student Data.

# 1. Definitions

Capitalized terms not defined in this section or above will have the meaning set forth by Applicable Laws.

**“Agreement”** means the underlying contractual agreement between Amplify and the School Customer.

**“Authorized Users”** means all authorized users of our Products, including Authorized School Users, parents and legal guardians, and children under the age of 13 who are permitted to sign up for our Products only with verifiable consent from their parent or guardian.

**“Authorized School Users”** means K–12 students, educators, and staff using Amplify’s Products pursuant to an Agreement or with the permission of the School District or State Agency.

**“School Customer”** means the School District or State Agency that is the party to the Agreement to provide the Amplify Products to the School Customer’s Authorized School Users.

**“School District”** means a local education agency, school network, independent school, or other regional education system.

**“State Agency”** means the educational agency primarily responsible for the supervision of public elementary and secondary schools in any of the 50 states, the Commonwealth of Puerto Rico, the District of Columbia, or other territories and possessions of the United States, as well as a national or regional ministry or department of education in other countries, as applicable.

## 2. What personal information do we collect?

When you access or use our Products, you may choose to provide us with personal information, including Student Data. This information may be provided to us directly (e.g. when an account is created or through communications with us) or through our Products.

**Student Data.** Below is a list of the categories of Student Data that may be collected by Amplify or its Products, either directly or through the School Customer’s use of the various features and configurations of the Products:

- **Identifier and Enrollment Data**, such as name, email, school / state ID number, username and password, grade level, homeroom, courses, teacher names.



- **Why?** Most of Amplify’s Products require some basic information about who is in a classroom and who teaches the class—student or teacher Identifier and Enrollment data. This information is provided to Amplify by our School Customers, either directly from the School Customer’s student information system or via a third party with whom the School Customer contracts to provide that information.
- **Demographic Data**, such as date of birth, socioeconomic status, race, national origin, and preferred or primary language.
  - **Why?** To support school instructional and reporting requirements, Amplify’s Products allow School Customers to view reports and analyze data using student demographic and other special indicators. For example, a School District may wish to analyze student literacy assessment results based on English Language Learner status to better tailor classroom instruction, and in that case may provide the associated indicator as part of the enrollment information to enable that reporting.
- **School Records**, such as grades, attendance, assessment results, and Individualized Education Plan status (i.e. whether a plan is in place)
  - **Why?** Some of our Products support grading assignments and administering formative, diagnostic, and curriculum-based assessments. Teachers use that data to support students’ progress in the program or help with instructional decisions. We do not collect specific details from an IEP, nor do we collect health or other sensitive information.
- **Schoolwork and Student Generated Content**, which includes any information contained in student assignments and assessments, including information in response to instructional activities and participation in collaborative or interactive features of our Products, such as student responses to academic questions and student-written essays, as well as images, video, and audio recordings.
  - **Why?** As part of the digital learning experience, some of our Products may enable students to write texts and create and upload images, video, and audio recordings. For example, in Amplify ELA, students may write essays or submit short-form responses in our platform as part of a lesson on literature. As another example, in Boost Reading, student interactions with reading skills games are recorded to keep track of the student’s progress to level up in the program and to provide visibility to teachers on how students are mastering the skills.
- **Teacher Comments and Feedback**, such as scores, written comments, or other feedback that educators may provide about student responses or student course performance.
  - **Why?** To enable teachers to track the performance and provide feedback to their students.

**Other Data.** We may collect the following types of personal information from all other Authorized Users:

- **Contact Information**, such as name and email address, as well as grade level taught, school name and school location, whether you are a teacher, administrator, or other authorized person that creates an account or uses our Products or communicates with us.
- **Account Information**, such as customer user login and password, for account creation and access purposes.
- **Survey Responses**, which you provide in response to surveys or questionnaires.

- **Device and Usage Data.** Depending on the Product, we may collect certain information about the device used to connect to our Product, such as device type and model, browser configurations, and persistent identifiers, such as IP addresses and unique device identifiers. We may collect device diagnostic information, such as battery level, usage logs, and error logs, as well as usage, viewing, and technical information (e.g., email open rates), such as the number of requests a device makes, to ensure proper system capacity for all Authorized Users. We may collect IP addresses and use that information to approximate device location to support operation of the Product. To the extent that we collect this information from website visitors who have not signed up for an account, this data is solely used to support operation of the Product and is not linked to Student Data.
- **How? Cookies and Similar Technologies.** We collect device and usage data through “cookies,” Web beacons, HTML5 local storage, and other similar technologies, which are used in some of our Products.
  - **Why?** We use this information to remember returning users and facilitate ease of login, to customize the function and appearance of the Products, and to improve the learning experience. This information also helps us track product usage for various purposes, including website optimization, to ensure proper system capacity, troubleshoot and fix errors, provide technical assistance and customer support, provide and monitor the effectiveness of our Products, monitor and address security concerns, and compile analytics for product improvement and other internal purposes. Learn how to opt out of cookies and similar technologies by reading the [“What Rights and Choices Do You Have?” section of this Privacy Policy below.](#)

## 3. How do we use personal information?

**Student Data.** Amplify uses Student Data for educational purposes, to provide the Products, and to ensure secure and effective operation of our Products, including:

- to provide and improve our educational Products;
- to support School Customers’ and Authorized School Users’ activities;
- to ensure secure and effective operation of our Products;
- for purposes requested or authorized by the School Customer or Authorized School User or as otherwise permitted by Applicable Laws;
- for adaptive or personalized learning purposes, provided that Student Data is not disclosed to third parties;
- for customer support purposes, to respond to the inquiries and fulfill the requests of our School Customers and their Authorized School Users;
- to enforce Product access and security controls; and
- to conduct system audits and improve protections against the misuse of our Products, or to detect and prevent fraud and other harmful activities.

We also use personal information to power the adaptive and personalized learning features of the Products. For example, we may make instructional recommendations to teachers and students based on the student’s progress in the program. These recommendations are offered as optional, additional learning support.

**Other Data.** Amplify may use Authorized User information for the purposes for which Student Data is used as set forth above. Amplify does not use Student Data for marketing purposes, but it may use the personal information of other Authorized Users for marketing in limited circumstances (e.g. to periodically send newsletters and other promotional materials), and as otherwise required or permitted, or as we may notify you at the time of collection. Learn how to opt out of these communications by reading the [“What Rights and Choices Do You Have?” section of this Privacy Policy below.](#)

Amplify may use aggregate or de-identified data as described in the [Aggregate/De-identified Data section below.](#)

## 4. To whom do we disclose personal information?

**Student Data.** We disclose Student Data to third parties only as needed to provide the Products under the Agreement, as directed or permitted by the School Customer or Authorized School User, and as required by law. Such disclosures may include but are not limited to the following:

- to other Authorized School Users of the School Customer entitled to access such data in connection with the Products;
- to our service providers, subprocessors, or vendors who have a legitimate need to access such data in order to assist us in providing or supporting our Products, such as platform, infrastructure, and application software. We contractually bind such parties to protect Student Data in a manner consistent with those practices set forth in this Privacy Policy and in accordance with Applicable Laws. List of Amplify subprocessors is available at <http://www.amplify.com/subprocessors>;
- to comply with the law, respond to requests in legal or government enforcement proceedings (such as complying with a subpoena), protect our rights in a legal dispute, or seek assistance of law enforcement in the event of a threat to our rights, security, or property or that of our affiliates, customers, Authorized Users, or others;
- in the event Amplify or all or part of its assets are acquired or transferred to another party, including in connection with any bankruptcy or similar proceedings, provided that successor entity will be required to comply with the privacy protections in this Privacy Policy with respect to information collected under this Privacy Policy, or we will provide the School Customer with notice and an opportunity to opt out of the transfer of such data prior to the transfer; and
- except as restricted by Applicable Laws or contracts with our School Customers, we may also share Student Data with Amplify’s affiliated education companies, provided that such disclosure is solely for the purposes of providing Products and at all times is subject to this Policy.

**Other Data.** Amplify discloses Authorized User information for the purposes for which Student Data is used as set forth above. Amplify may also disclose Authorized User information as otherwise required or permitted, or as disclosed at the time of collection.

## 5. Aggregate/De-identified data

Amplify may use de-identified or aggregate data for purposes allowed under FERPA and other Applicable Laws, to research, develop, and improve educational sites, services, and applications and to demonstrate the effectiveness of the Amplify Products. Amplify will not attempt to re-identify de-identified data. We may use aggregate information (which is information that has been collected in summary form such that the data cannot be associated with any individual) for analytics and reports. For example, our marketing materials may note the total number of students served by our programs in the prior year, but that information cannot be used to identify any one student. We may also share de-identified or aggregate data with research partners to help us analyze the information for product improvement and development purposes.

Records and information are de-identified when all personal information has been removed or obscured, such that the remaining information does not reasonably identify a specific individual. We de-identify Student Data in compliance with Applicable Laws and in accordance with the guidelines of NIST SP 800-122. Amplify has implemented internal procedures and controls to protect against the re-identification of de-identified Student Data. Amplify does not disclose de-identified data to its research partners unless that party has agreed in writing not to attempt to re-identify such data.

## 6. Data prohibitions, Advertising, Advertising limitations

Amplify will not:

- sell Student Data to third parties;
- use or disclose Student Data to inform, influence, or enable targeted advertising to a student based on Student Data or information or data inferred over time from the student's usage of the Products;
- use Student Data to develop a profile of a student for any purpose other than providing the Products to a School Customer or Authorized School User, or as authorized by a parent or legal guardian;
- use Student Data for any commercial purpose other than to provide the Products to the School Customer or Authorized School User, or as permitted by Applicable Laws.

Amplify may, from time to time, provide customized content, advertising, and commercial messages to Authorized Users, provided that such advertisements shall not be based on Student Data or directed to K-12 students. Amplify may use de-identified Student Data to recommend educational products or services to School Customers and their Authorized Users (subject to exceptions permitted under applicable law), or to notify such users about new educational product updates, features, or services.

## 7. External third-party services

This Privacy Policy applies solely to Amplify's Products and practices. Amplify School Customers and other Authorized Users may choose to connect or use our Products in conjunction with third-party services and Products. Additionally, our sites and Products may contain social media plugins (e.g. like or share buttons) as well as links to third-party websites or services. This Privacy Policy does not address, and Amplify is not responsible for, the privacy, information, or other practices of such third parties. Customers should carefully consider which third-party applications to include among the Products and services they provide to students and vet the privacy and data security standards of those providers.

Authorized Users may be able to log in to our Products using third-party sign-in services such as Clever or Google. These services authenticate your identity and provide you with the option to share certain personal information with us, including your name and email address, to pre-populate our account sign-up form. If you choose to enable a third party to share your third-party account credentials with Amplify, we may obtain personal information via that mechanism. You may configure your accounts on these third-party platform services to control what information they share.

## 8. Security

Amplify's servers are hosted, managed, and controlled by us in the United States and are not intended to subject Amplify to the laws or jurisdiction of any jurisdiction other than that of the United States. If you are located outside the United States, you understand and consent to having Student Data collected and maintained by Amplify processed in the United States. United States data protection and other relevant laws may not be the same as those in your jurisdiction. This includes the use of cookies and other tracking technologies as described herein. See also [Notice for European Economic Area and United Kingdom Customers below](#).

### Student Data

Amplify maintains a comprehensive information security program and uses industry standard administrative, technical, operational, and physical measures to safeguard Student Data in its possession against loss, theft and unauthorized use, disclosure, or modification. Amplify performs periodic risk assessments of its information security program and prioritizes the remediation of identified security vulnerabilities. Please see [amplify.com/security](https://amplify.com/security) for a detailed description of Amplify's security program.

In the event Amplify discovers or is notified that Student Data within our possession or control was disclosed to, or acquired by, an unauthorized party, we will investigate the incident, take steps to mitigate the potential impact, and

notify the School Customer in accordance with Applicable Laws.

## Other Data

Outside of Student Data, Amplify uses commercially reasonable administrative, technical, personnel, and physical measures to safeguard personal information in its possession against loss, theft, and unauthorized use, disclosure or modification.

# 9. What rights and choices do you have?

## What Choices Do You Have?

**Opt-out of Marketing Communications.** If you want to stop receiving promotional materials from Amplify, you can email us at [privacy@amplify.com](mailto:privacy@amplify.com) or follow the unsubscribe instructions at the bottom of each email.

**Opt-out of Cookies and Similar Tracking Technologies.** With respect to cookies, you may be able to reject cookies through your browser or device controls. Note that you have to opt-out of cookies on each browser or device that you use. If you replace, change, or upgrade your browser or device, or delete your cookies, you may need to use these opt-out tools again. Please be aware that disabling cookies may negatively impact your experience as some features may not work properly. To learn more about browser cookies, including how to manage or delete them, check the “Help,” “Tools,” or similar section of your browser.

## What Rights Do You Have With Respect to Student Data?

**Review and Correction.** FERPA requires schools to provide parents with access to their children’s education records, and parents may request that the school correct records that they believe to be inaccurate or misleading.

- If you are a parent or guardian and would like to review, correct, or update your child’s data stored in our Products, contact your School District. Amplify will work with your School District to enable your access to and, if applicable, correction of your child’s education records.
- If you have any questions about whom to contact or other questions about your child’s data, you may contact us using the information provided below.

**No third-party website tracking.** Amplify does not track students across third-party websites and does not respond to Do Not Track (DNT) signals. Amplify does not permit third-party advertising networks to collect information from or about students using Amplify educational Products for the purpose of serving targeted advertising across websites and over time and Amplify will never use Student Data for targeted advertising.

## What is our Deletion/Retention Policy?

Upon request, we provide the School Customer the opportunity to review and delete the personal information collected from students.

**Student Data Retention.** We will retain Student Data for the period necessary to fulfill the purposes outlined in this Privacy Policy and our Agreement with the School Customer. We do not knowingly retain Student Data beyond the time period required to support a School Customer's or Authorized School User's educational purpose, unless authorized by the School Customer or Authorized School User. Upon request, Amplify will return, delete, or destroy Student Data stored by Amplify in accordance with applicable law and customer requirements. We may not be able to delete all data in all circumstances, such as information retained in technical support records, customer service records, back-ups, and similar business records. Unless otherwise notified by our School Customer, we will delete or de-identify Student Data after termination of our Agreement with the School Customer.

## 10. COPPA

**Except as described in the Appendix,** we do not knowingly collect personal information from a Child User unless and until a School Customer or educator has, on behalf of a parent or guardian, authorized us to collect such information to provide the Products. We comply with all applicable provisions of COPPA. To the extent COPPA applies to the information we collect, we process such information for educational purposes only, at the direction of the partnering School District or State Agency and on the basis of educational institutional consent. If you are a parent or guardian and have questions about your child's use of the Products and any personal information collected, please direct these questions to your child's school.

## 11. Updates to this policy

We may change this Privacy Policy in the future. For example, we may update it to comply with new laws or regulations, to conform to industry best practices, or to reflect changes in our product offerings. When these changes do not reflect material changes in our practices with respect to use and/or disclosure of Authorized Users' personal information, including Student Data, such changes to the Privacy Policy will become effective when we post the revised Privacy Policy on our website. In the event there are material changes in our practices that would result in Authorized Users' personal information being used in a materially different manner than was disclosed when the information was collected, with respect to Student Data, we will notify the School Customer, and with respect to other information, we will notify you via email and provide an opportunity to opt-out before such changes take effect.

# 12. Contact us

If you have questions about this Privacy Policy, please contact us at:

Email: [privacy@amplify.com](mailto:privacy@amplify.com)

Mail: Amplify Education, Inc.

55 Washington St.#800

Brooklyn, NY, 11201

Phone: (800) 823-1969

Attn: General Counsel

To report a security vulnerability, visit <https://amplify.com/report-a-vulnerability/>.

## Appendix – Supplemental Disclosures

### 1. Notice for Parents/Guardians Regarding Mathigon

While our Products are primarily geared towards School Customers, we do provide an opportunity for children and teens to sign up for a Mathigon account at home—outside of the school context—only with verifiable parental consent from parents or guardians if their child is a Child User.

Please note that most parts of Mathigon can be used without creating an account or providing any personal information that directly identifies you. However, if you are a parent or guardian and would like to authorize your child to sign up for a Mathigon account so that we can offer personalized educational services (e.g. by remembering your child’s progress, tailoring our content to your child’s interests or abilities, or suggesting what to learn next), please read our [Acceptable Use Policy](#), available at [amplify.com/acceptable-use-policy](https://amplify.com/acceptable-use-policy), which explains our verifiable consent process, and then sign up by visiting <https://mathigon.org/signup>.

**What Rights Do You Have?** If you are the parent or guardian of a Child User, you may request that we provide for your review, delete from our records, or cease collecting any personal information from your Child User. To exercise these rights, please contact us by sending an email to: [help@amplify.com](mailto:help@amplify.com). You may also be able to correct your personal information provided to us, download a copy of all the personal information we have about you, or delete your account via your account settings page. Please note that we may retain certain information as permitted by law. We may also retain cached or archived copies of the information we collect for a certain period of time.



## 2. Notice for our California Customers

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### Personal Information We Collect

Student Data, which includes:

- Roster Information
- Demographic Data, such as race and national origin
- School Records
- Account Information
- Schoolwork and Student Generated Content
- Teacher Comments and Feedback
- Device and Usage Data

### How We Use Personal Information

- To provide and improve our educational Products;
- To support School Customers' and Authorized School Users' activities;
- To ensure secure and effective operation of our Products;
- For purposes requested or authorized by the School Customer or Authorized School Users, or as otherwise permitted by Applicable Laws;
- For adaptive or personalized learning purposes, provided that Student Data is not disclosed;
- For customer support purposes, to respond to the inquiries and fulfill the requests of our School Customers and their Authorized School Users;
- To enforce product access and security controls; and
- To conduct system audits and improve protections against the misuse of our Products, or to detect and prevent fraud and other harmful activities.

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Authorized Users, which includes:

- Contact Information
- Account Information
- Survey Responses
- Device and Usage Data

- For the purposes for which Student Data is used as set forth above;
- For marketing purposes in limited circumstances (e.g. to periodically send newsletters and other promotional materials), which will not be based on Student Data or directed to K–12 students
- As otherwise required or permitted, or as we may notify you at the time of collection.

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We do not sell or share your personal information, as described in California law.

We retain your personal information for as long as reasonably necessary for the purposes disclosed in the chart above. Additional information about our retention of Student Data can be found in Section 9 of this Privacy Policy.

Please see the Additional U.S. State Privacy Law Rights section of this appendix for information about your rights pursuant to applicable California law.

### Notice of Financial Incentive

As part of our services, there will be opportunities to complete surveys and questionnaires. As an incentive for completing the survey or questionnaire, you can voluntarily provide personal information as an entry into a raffle drawing or to obtain other benefits, discounts, offers, or deals that may constitute a financial incentive under California law (“**Financial Incentive**”). The categories of personal information required for us to provide the Financial Incentives include: contact information and any other information that you choose to provide when you complete the survey.

Participation is voluntary and you can opt out at any time before the survey is complete. We do not allow students to participate in our surveys.

The value of the personal information we collect in connection with our Financial Incentives is equivalent to the value of the benefit offered.

### 3. Notice for other U.S. Customers—Additional U.S. State Privacy Law Rights

You have the following rights, where provided under applicable state law, regarding your personal information (each of which is subject to various exceptions and limitations):

- **Access.** You have the right to request, up to two times every 12 months, that we disclose to you the categories of personal information collected about you; the categories of sources from which the personal information is collected; the categories of personal information sold or shared; the business or commercial purpose for collecting, selling, or sharing the personal information; the categories of third parties with whom personal information was shared; and the specific pieces of personal information collected about you.
- **Correction.** You have the right to request that we correct inaccurate personal information collected from you, subject to certain exceptions allowed under applicable law.
- **Deletion.** You have the right to request that we delete the personal information that we maintain about you, subject to certain exceptions. Even after the deletion of your account, some personal information may remain on our servers, such as in technical support logs, server caches, data backups, or email conversations. These will be automatically deleted after a reasonable amount of time, unless we are legally required to retain information for longer, or unless there is a legitimate business reason (e.g. security and fraud prevention or financial record-keeping). We are not required to delete any information which has been aggregated or de-identified in accordance with Section 5.
- **No Discrimination.** You have the right not to be discriminated against for exercising these rights.
- **Appeals.** You have a right to appeal decisions concerning your ability to exercise your consumer rights.
- **Submission of Requests.** You may exercise the above rights by emailing us at [privacy@amplify.com](mailto:privacy@amplify.com). Note that we may deny certain requests, or fulfill a request only in part, based on our legal rights and obligations. For example,

we may retain personal information as permitted by law, such as for tax or other record keeping purposes, to maintain an active account, and to process transactions and facilitate customer requests.

- **Authorized Agent.** You may designate an authorized agent to make a request on your behalf. When submitting the request, please ensure the authorized agent identifies himself/herself/itself as an authorized agent and can show written permission from you to represent you. We may contact you directly to confirm that you have authorized the agent to act on your behalf and confirm your identity.
- **Verification.** Whether you submit a request directly on your own behalf, or through an authorized agent, we will take reasonable steps to verify your identity prior to responding to your requests. The verification steps will vary depending on the sensitivity of the personal information and whether you have an account with us.

***Note for students and other Authorized Users who engage with Amplify in connection with a School Customer's use of***

***Amplify:*** Because Amplify provides the Products to School Customers and Authorized Users as a “School Official,” we collect, retain, use, and disclose Student Data only for or on behalf of our School Customers and Authorized Users for educational purposes, including the purpose of providing the Products specified in our Agreement with the School Customer and for no other commercial purpose. Accordingly, we act as a “service provider” for our School Customers under the CCPA. If you have any questions or would like to exercise your California rights, please contact your school directly.

#### **4. Notice for European Economic Area and United Kingdom Customers**

If you represent a school in the United Kingdom or European Economic Area, you can review our standard template DPA with attached SCCs [here](#). If the school would like to enter into that DPA (and attached SCCs) with Amplify, please send an email to [privacy@amplify.com](mailto:privacy@amplify.com) with the following information about the school: (i) name, (ii) address, (iii) telephone number, (iv) signatory name, (v) signatory title, and (vi) signatory email address, and (vii) teacher.desmos.com account usernames. We will then send the school's signatory a copy of the DPA for electronic signatures and arrange for signature by Amplify's authorized representative.

Amplify collects personal data for the purposes described in Section 3 of this Privacy Policy. We rely on the following lawful bases for our processing activities:

- Consent;
- Pursuant to a contract with the user of our Products;
- To comply with our legal obligations; or
- When we have a legitimate interest in doing so, which is not outweighed by the risks to the individual.

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# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

9/30/2024

3/11/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Lockton Companies 1185 Avenue of the Americas, Suite 2010 New York NY 10036 646-572-7300	<b>CONTACT NAME:</b> <b>PHONE (A/C. No. Ext):</b> <b>E-MAIL ADDRESS:</b>	<b>FAX (A/C. No):</b>
	<b>INSURER(S) AFFORDING COVERAGE</b>	
<b>INSURED</b> 1502045 Amplify Education, Inc. 55 Washington St. Brooklyn NY 11201	<b>INSURER A:</b> National Union Fire Ins Co Pitts. PA	
	<b>INSURER B:</b> QBE Insurance Corporation	
	<b>INSURER C:</b>	
	<b>INSURER D:</b>	
	<b>INSURER E:</b>	
	<b>INSURER F:</b>	
		<b>NAIC #</b> 19445  39217

**COVERAGES** **CERTIFICATE NUMBER:** 20363608 **REVISION NUMBER:** XXXXXXXX

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			NOT APPLICABLE			EACH OCCURRENCE \$ XXXXXXXX DAMAGE TO RENTED PREMISES (Ea occurrence) \$ XXXXXXXX MED EXP (Any one person) \$ XXXXXXXX PERSONAL & ADV INJURY \$ XXXXXXXX GENERAL AGGREGATE \$ XXXXXXXX PRODUCTS - COMP/OP AGG \$ XXXXXXXX \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY			NOT APPLICABLE			COMBINED SINGLE LIMIT (Ea accident) \$ XXXXXXXX BODILY INJURY (Per person) \$ XXXXXXXX BODILY INJURY (Per accident) \$ XXXXXXXX PROPERTY DAMAGE (Per accident) \$ XXXXXXXX \$ XXXXXXXX
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$			NOT APPLICABLE			EACH OCCURRENCE \$ XXXXXXXX AGGREGATE \$ XXXXXXXX \$ XXXXXXXX
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y/N <input checked="" type="checkbox"/> N/A If yes, describe under DESCRIPTION OF OPERATIONS below			NOT APPLICABLE			PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ XXXXXXXX E.L. DISEASE - EA EMPLOYEE \$ XXXXXXXX E.L. DISEASE - POLICY LIMIT \$ XXXXXXXX
B	Cyber/Professional Liability	N	N	130001837	12/1/2023	12/1/2024	Limit: \$5,000,000 Ret: \$250,000 See attached
A	Management Liab			01-508-53-84	9/30/2023	9/30/2024	

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

**CERTIFICATE HOLDER****CANCELLATION** See Attachment

20363608

 Lincolnwood School District 74  
 6950 N. East Prairie Road  
 Lincolnwood, IL 60712

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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Other: Management Liability

Policy#:	01-508-53-84
New Policy Term:	9/30/2023 - 9/30/2024
Issuing Co.:	National Union Fire Insurance Company of Pittsburgh, PA
D&O Limit	\$5,000,000.00
Retention	\$50,000.00
EPLI Limit	\$3,000,000.00
Retention	\$200,000.00
Fiducary Limit	\$2,000,000.00
Retention	\$ -
Crime Limit	\$1,000,000.00
Retention	\$10,000.00
Employed Lawyers Limit	\$3,000,000.00
Retention	\$10,000.00

Other: Excess Management Liability

Policy#:	BPRO8099329
Policy Term:	9/30/2023 - 9/30/2024
Issuing Co.:	National Union Fire Insurance Company of Pittsburgh, PA
Excess D&O and EPL Limit	\$5,000,000

**AMENDMENT TO AGREEMENT BETWEEN THE BOARD OF EDUCATION OF  
LINCOLNWOOD SCHOOL DISTRICT 74 AND AMPLIFY EDUCATION, INC.**

This Amendment is entered into as of April 4, 2024, by and between the Board of Education of Lincolnwood School District No. 74 (“School District”) and Amplify Education, Inc. (“Amplify”) pursuant to Quote # Q-338508-1 dated January 29, 2024, and the Customer Terms & Conditions (collectively, the “Agreement”), and shall continue in force for any extensions of the Agreement or subsequent renewals or order forms, unless otherwise agreed by the Parties.

1. **Terms and Conditions.** This Amendment modifies the Agreement entered into by the Parties. Terms and conditions not amended herein shall have the same meaning as in the Agreement. If there is conflict between this Amendment and the Agreement, the terms of this Amendment will prevail. Amplify shall not materially modify or amend the Agreement (see <https://amplify.com/customer-terms>) during the term of this Agreement or any extension thereof, without providing written notice.
2. **Auto-Renewal.** The term of the Agreement between the parties shall not automatically renew. Subsequent extensions of the Agreement shall require notice to and approval of the School District.
3. **FOIA/OMA.** School District shall not be required to make any claim of privilege that may be applicable to prevent disclosure in response to, and will not be required to notify Amplify prior to any disclosure in response to, a valid FOIA request for information that is not confidential or proprietary. Amplify acknowledges and agrees that the Agreement is not confidential or exempt from disclosure under the Illinois Freedom of Information Act or Open Meetings Act.
4. **Governing Law/Venue.** This Agreement will be governed and construed in accordance with the laws of the State of Illinois, without regard to any conflicts of law provisions. Venue for all actions between the parties shall lie solely in the Circuit Court of Cook County, Illinois. Amplify hereby agrees to this exclusive venue, to personal jurisdiction of this court, and to service of process in accordance with its rules of civil procedure, and Amplify waives any objection that this venue is not convenient. Any references to binding arbitration, the waiver of the right to a jury trial, or the waiver of claims which may be litigated on a class or representative basis shall be deleted from the Agreement as it currently exists or as it may be modified or amended in the future.
5. **Illinois Student Privacy Laws.** In addition to its obligation to maintain student data in accordance with applicable federal laws, Amplify shall also maintain all student data obtained from School District in accordance with any applicable Illinois laws, including (without limitation, and only to the extent applicable) the *Illinois School Student Records Act* (105 ILCS 10/1 *et seq.*); and the *Illinois Student Online Personal Protection Act* (105 ILCS 85/1 *et seq.*) (herein “SOPPA”). In accordance with SOPPA, the School District has separately executed an Exhibit E “General Offer of Privacy Terms” to join in the IL-NDPA Agreement between Amplify and another Illinois public school district.
6. **Insurance.** During the term of this Agreement and any renewal thereof, Amplify shall maintain a cyber-liability insurance policy insuring against data breaches. School District shall be



named as an additional insured on such policy. Any damages limitations in this Agreement shall not apply to School District in its capacity as an additional insured.

7. **Authority to Execute.** Each signatory hereto represents and warrants that he or she has the proper corporate authority to execute this Amendment and bind his or her entity to the terms and conditions hereof.

**WHEREAS**, this Amendment and its terms and conditions are agreed upon by the Parties on the date set forth above.

**BOARD OF EDUCATION OF  
LINCOLNWOOD SCHOOL DISTRICT 74**

**AMPLIFY EDUCATION, INC.**

By: \_\_\_\_\_

By: Richard Morris

Its: \_\_\_\_\_

Its: SVP, Finance

Date: \_\_\_\_\_

Date: 03 / 11 / 2024



# Price Quote

## Amplify

55 Washington Street, Suite 800  
Brooklyn, NY 11201  
Phone: (800) 823-1969  
Fax: (646) 403-4700

Quote #: Q-336048-1  
Date: 3/11/2024  
Expires On: 4/10/2024

### Customer Contact Information

Dominick Lupo  
Lincolnwood Sch Dist 74  
0  
dlupo@sd74.org

### Amplify Contact Information

Katie Galvin  
Inside Account Executive  
kgalvin@amplify.com

6 Years Integrated

#### Grade 6

PRODUCT	PRICE	QUANTITY FREE	QUANTITY CHARGE	TOTAL PRICE
Amplify Science MS G6 Integrated Teacher License - 6yr (2024-2030)	\$0.00	0	1	\$0.00
Amplify Science Full Year Grade 6 Course - Integrated Model - LICENSE - UPFRONT - 6yr (2024-2030)	\$86.00	0	140	\$12,040.00
Amplify Science Middle School: Grade 6 Integrated Course Model Kits	\$2,914.00	0	1	\$2,914.00
Amplify Science Grade 6 Investigation Notebook Bundle (1 qty per unit)	\$161.46	0	140	\$22,604.40
Amplify Science Middle School: Grade 6 Integrated Course Model Print Teacher Guides (1 qty per unit)	\$300.00	1	0	\$0.00
<b>TOTAL</b>				<b>\$37,558.40</b>

#### Grade 7

PRODUCT	PRICE	QUANTITY FREE	QUANTITY CHARGE	TOTAL PRICE
Amplify Science MS G7 Integrated Teacher License - 6yr (2024-2030)	\$0.00	0	1	\$0.00
Amplify Science Full Year Grade 7 Course - Integrated Model - LICENSE - UPFRONT - 6yr (2024-2030)	\$86.00	0	155	\$13,330.00
Amplify Science Middle School: Grade 7 Integrated Course Model Kits	\$3,265.00	0	1	\$3,265.00
Amplify Science Grade 7 Investigation Notebook Bundle (1 qty per unit)	\$161.46	0	155	\$25,026.30
Amplify Science Middle School: Grade 7 Integrated Course Model Print Teacher Guides (1 qty per unit)	\$300.00	1	0	\$0.00
<b>TOTAL</b>				<b>\$41,621.30</b>

**Grade 8**

PRODUCT	PRICE	QUANTITY FREE	QUANTITY CHARGE	TOTAL PRICE
Amplify Science MS G8 Integrated Teacher License - 6yr (2024-2030)	\$0.00	0	1	\$0.00
Amplify Science Full Year Grade 8 Course - Integrated Model - LICENSE - UPFRONT - 6yr (2024-2030)	\$86.00	0	128	\$11,008.00
Amplify Science Middle School: Grade 8 Integrated Course Model Kits	\$3,525.00	0	1	\$3,525.00
Amplify Science Grade 8 Investigation Notebook Bundle (1 qty per unit)	\$161.46	0	128	\$20,666.88
Amplify Science Middle School: Grade 8 Integrated Course Model Print Teacher Guides (1 qty per unit)	\$300.00	1	0	\$0.00
<b>TOTAL</b>				<b>\$35,199.88</b>

**Professional Development**

PROFESSIONAL DEVELOPMENT	QUANTITY	PRICE	TOTAL PRICE
Amplify Science G6-8 Year 1 Hybrid 15: Virtual Launch	1.00	\$5,450.00	\$5,450.00
<b>TOTAL</b>		<b>\$5,450.00</b>	<b>\$5,450.00</b>

**Shipping and Handling**

SHIPPING AND HANDLING	SHIPPING COST	TOTAL PRICE
Amplify Shipping and Handling	\$12,209.23	\$12,209.23

TOTAL DISCOUNT \$900.00  
 GRAND TOTAL \$132,038.81

**Scope and Duration****Payment Terms:**

- This Price Quote (including all pricing and other terms) is valid through Quote Expiration Date stated above.
- Payment terms: net 30 days.
- Prices do not include sales tax, if applicable.
- Pricing terms in the Price Quote are based on the scope of purchase and other terms herein.
- The Federal Tax ID # for Amplify Education, Inc. is 13-4125483. A copy of Amplify's W-9 can be found at: <http://www.amplify.com/w-9.pdf>

**License and Services Term:**

- Licenses: 07/01/2024 until 06/30/2030.
- Services: 18 months from order date. Unless otherwise stated above, all training and other services purchased must be scheduled and delivered within such term or will be forfeited.

**Special Terms:**

- **FOR SHIPPED MATERIALS:**
  - Expedited shipping is available at extra charge.
  - Print materials and kits are non-returnable and non-refundable, except in the case of defective or missing materials reported by Customer within 60 days of receipt.

- FOR SERVICES:
  - Training and professional development sessions cancelled with less than one week notice will be deemed delivered.

### Quote Special Terms

#### Free-with-Order Science Teacher Guides

Please note that the above pricing reflects the availability of free-with-order print teacher guides in proportion to the purchase of licenses, materials kits, and print student investigation notebooks for entire classroom.

#### Science Dig Exp Included with Kit

Please note that the above pricing reflects the receipt of a class set of 36 Student Digital Experience Licenses, included with every purchase of a grade level set of K-5 Science Kits.

### How to Order Our Products

Amplify would like to process your order as quickly as possible. Please visit [amplify.com/ordering-support](https://amplify.com/ordering-support) to find all the information you need for submitting your order. We accept the following forms of payment: purchase orders, checks, and credit card payments (Visa, MasterCard, Discover and American Express). In order for us to assist you, please help us by following these instructions:

#### **Please include these three documents with your order:**

- Authorized purchase order or check
- A copy of your Price Quote
- A copy of your Tax-Exemption Certificate

#### **If submitting a purchase order:**

To expedite your order, please visit [amplify.com/ordering-support](https://amplify.com/ordering-support) where you can submit your signed purchase order. You can also email a purchase order to [IncomingPO@amplify.com](mailto:IncomingPO@amplify.com) or fax it to (646) 403-4700. Purchase Orders can also be mailed to our Order Management Department at the address below.

#### **If submitting your order via credit card:**

- Please email [Accountsreceivable@amplify.com](mailto:Accountsreceivable@amplify.com) to request a secure credit card payment link

#### **If submitting your order via sending a check:**

- Please mail your documents directly to our Order Management Department and notify your sales representative of the check number and check amount.
- Please note that mailing a check can add up to two weeks of processing time for your order. For faster processing of your order, please submit your order via Purchase Order or Credit Card Authorization Form.

The information requested above is essential to ensure the smooth completion of your order with Amplify. Failure to submit documents will prevent your order from processing.

Our Order Management Department is located at 55 Washington Street, Suite 800, Brooklyn, NY 11201. Please note that mailing any documents can result in delays of up to two weeks. **For faster processing of your order, we recommend you submit a purchase order via our website: [amplify.com/ordering-support](https://amplify.com/ordering-support).**

This Price Quote is subject to the Customer Terms & Conditions of Amplify Education, Inc. attached and available at [amplify.com/customer-terms](https://amplify.com/customer-terms). Issuance of a purchase order or payment pursuant to this Price Quote, or usage of the products specified herein, shall be deemed acceptance of such Terms & Conditions.

### Terms & Conditions

1. Scope. These Terms and Conditions (the "Customer Terms") are a legal agreement between Amplify Education, Inc. ("Amplify") and your school, district, state agency, or other educational organization ("you" or "Customer") for the license and use of one or more of Amplify products or services (the "Products"), as specified in the receipt, price quote, proposal, renewal letter, or other ordering document containing the details of this purchase (the "Quote"). Unless otherwise specified in the Quote, these Customer Terms and the Quote constitute the entire agreement between Amplify and Customer regarding the license and use of the Products (the "Agreement"). This Agreement becomes effective at the earliest of the following: (i) issuing a purchase order, shipment request, or payment against the Quote; (ii) accessing, downloading, or using the Products; or (iii) otherwise accepting this Agreement. You represent and warrant that: (1) you are of legal age to accept this Agreement; (2) you are authorized to accept this Agreement and to access and use the Products; and (3) your use of the Products will comply at all times with Amplify's [Acceptable Use Policy](#) available at [amplify.com/acceptable-use](#) ("AUP"). If you do not agree to this Agreement, do not access, download, or use the Products.

2. License. Subject to the terms and conditions of the Agreement, Amplify grants to Customer a non-exclusive, non-transferable, non-sublicensable license to access and use, and permit Authorized School Users, as defined below, to access and use the Products in accordance with the AUP, for the duration specified in the Quote (the "Term"), and for the number of Authorized School Users specified in the Quote for whom Customer has paid the applicable fees to Amplify. "Authorized School User" means an individual teacher or other personnel employed by Customer, or an individual student registered or authorized for instruction with Customer, who Customer permits to access and use the Products subject to the terms and conditions of the Agreement, solely while such individual is so employed or so registered. Each Authorized School User's access and use of the Products will be subject to Amplify's AUP in addition to the terms and conditions of the Agreement. Violations of this Agreement or the AUP may result in suspension or termination of the applicable account.

3. Restrictions. Customer may access and use the Products solely for non-commercial instructional and administrative purposes. Guidelines for such purposes may be detailed in materials associated with the Product you are accessing. Further, Customer may not, except as expressly authorized or directed by Amplify: (a) copy, modify, translate, distribute, disclose, or create derivative works based on the contents of, sell, or otherwise exploit, the Products, or any part thereof; (b) decompile, disassemble, reverse engineer the Products, or otherwise use the Products to develop functionally similar products or services; (c) modify, alter, or delete any of the copyright, trademark, or other proprietary notices in or on the Products; (d) rent, lease, or lend the Products or use the Products for the benefit of any third party; (e) avoid, circumvent, or disable any security or digital rights management device, procedure, protocol, or mechanism in the Products; or (f) permit any Authorized User or third party to do any of the foregoing. Customer also agrees that any works created in violation of this section are derivative works, and, as such, Customer agrees to assign, and hereby assigns, all right, title, and interest in such works to Amplify. The Products and derivatives thereof may be subject to export control laws, restrictions, regulations, and orders of the U.S. and other jurisdictions (together, "Export Laws"). Customer agrees to comply with all applicable Export Laws, and will not, and will not permit Authorized School Users to, export, or transfer for the purpose of re-export, any Product to any prohibited or embargoed country in violation of any U.S. export law or regulation. Further, Customer represents that it is not a party subject to sanctions by the U.S. Office of Foreign Assets Control or included on any restricted party list maintained by the U.S. Bureau of Industry and Security. The software and associated documentation portions of the Products are "commercial items" (as defined at 48 CFR 2.101), comprising "commercial computer software" and "commercial computer software documentation," as those terms are used in 48 CFR 12.212. Accordingly, if Customer is the U.S. Government or its contractor, Customer will receive only those rights set forth in this Agreement in accordance with 48 CFR 227.7201-227.7204 (for Department of Defense and their contractors) or 48 CFR 12.212 (for other U.S. Government licensees and their contractors).

4. Reservation of Rights. SUBSCRIPTION PRODUCTS ARE LICENSED, NOT SOLD. Subject to the limited rights expressly granted hereunder, all rights, title, and interest in and to all Products, including all related IP Rights, are and will remain the sole and exclusive property of Amplify or its third-party licensors. "IP Rights" means, collectively, rights under patent, trademark, copyright, and trade secret laws, and any other intellectual property or proprietary rights recognized in any country or jurisdiction worldwide. Customer must promptly notify Amplify of any violation of Amplify's IP Rights in the Products, and will reasonably assist Amplify as necessary to remedy any such violation. Amplify Products are protected by patents (see [amplify.com/virtual-patent-marking](#)).

5. Payments. In consideration of the Products, Customer will pay to Amplify (or other party designated on the Quote) the fees specified in the Quote in full within 30 days of the date of invoice, except as otherwise agreed by the parties or for those amounts that are subject to a good faith dispute of which Customer has notified Amplify in writing. Customer will be responsible for all state or local sales, use or gross receipts taxes, and federal excise taxes unless Customer provides a then-current tax exemption certificate in advance of the delivery, license, or performance of any Product, as applicable.

6. Shipments. Unless otherwise specified on the Quote, physical Products will be shipped FOB origin in the US (Incoterms 2010 EXW outside of the US) and are deemed accepted by Customer upon receipt. Upon acceptance of such Products, orders are non-refundable, non-returnable, and non-exchangeable, except in the case of defective or missing materials reported to Amplify by Customer within 60 days of receipt. In such case, Customer may not return Products without Amplify's written authorization.

7. Account Information. For subscription Products, the authentication of Authorized School Users is based in part upon information supplied by Customer or Authorized School Users, as applicable. Customer will and will cause its Authorized School Users to (a) provide accurate information to Amplify or a third-party service as applicable, and promptly report any changes to such information, (b) not share login credentials or otherwise allow others to use their account, (c) maintain the confidentiality and security of their account information, and (d) use the Products solely via such authorized accounts. Customer agrees to notify Amplify immediately of any unauthorized use of its or its Authorized School Users' accounts or related authentication information. Amplify will not be responsible for any losses arising out of the unauthorized use of accounts created by or for Customer and its Authorized School Users.

8. Confidentiality. Customer acknowledges that, in connection with this Agreement, Amplify has provided or will provide to Customer and its Authorized School Users certain sensitive or proprietary information, including software, source code, assessment instruments, research, designs, methods, processes, customer lists, training materials, product documentation, know-how, or trade secrets, in whatever form ("Confidential Information"). Customer agrees (a) not to use Confidential Information for any purpose other than use of the Products in accordance with this Agreement and (b) to take all steps reasonably necessary to maintain and protect the Confidential Information of Amplify in strict confidence. Confidential Information shall not include information that, as evidenced by Customer's contemporaneous written records: (i) is or becomes publicly available through no fault of Customer; (ii) is rightfully known to Customer prior to the time of its disclosure; (iii) has been independently developed by Customer without any use of the Confidential Information; or (iv) is subsequently learned from a third party not under any confidentiality obligation.

9. Student Data. The parties acknowledge and agree that in the course of providing the Products to the Customer, Amplify may collect, receive, or generate information that directly relates to an identifiable current or former student of Customer ("Student Data"). Student Data may include personal information from a student's "educational records," as defined by the Family Educational Rights and Privacy Act of 1974 ("FERPA"). Student Data is owned and controlled by the Customer and Amplify receives Student Data as a "school official" under Section 99.31 of FERPA for the purpose of providing the Products hereunder. Individually and collectively, Amplify and Customer agree to uphold our obligations, as applicable, under FERPA, the Children's Online Privacy Protection Act ("COPPA"), the Protection of Pupil Rights Amendment ("PPRA"), and applicable state laws relating to student data privacy. Amplify's [Privacy Policy](https://amplify.com/customer-privacy) at [amplify.com/customer-privacy](https://amplify.com/customer-privacy) ("Privacy Policy") will govern collection, use, and disclosure of Student Data collected or stored on behalf of Customer under this Agreement. Customer is responsible for providing notice and obtaining appropriate consents under applicable laws to authorize Authorized School Users' use of the Products, including making a copy of the [Privacy Policy](https://amplify.com/customer-privacy) available to the parents or guardians of users who are under the age of 13. In addition, Amplify has entered into the Data Privacy Agreements listed at [amplify.com/privacy-security](https://amplify.com/privacy-security) aligned with state and national templates to facilitate compliance with applicable state laws and help expedite Customer's student data privacy documentation process.

10. Customer Materials and Requirements. Customer represents, warrants, and covenants that it has all the necessary rights, including consents and IP Rights, in connection with any data, information, content, and other materials provided to or collected by Amplify on behalf of Customer or its Authorized School Users using the Products or otherwise in connection with this Agreement ("Customer Materials"), and that Amplify has the right to use such Customer Materials as contemplated hereunder or for any other purposes required by Customer. Customer is solely responsible for the accuracy, integrity, completeness, quality, legality, and safety of such Customer Materials. Customer is responsible for meeting hardware, software, telecommunications, and other requirements listed at [amplify.com/customer-requirements](https://amplify.com/customer-requirements).

11. Warranty Disclaimer. PRODUCTS ARE PROVIDED "AS IS" AND WITHOUT WARRANTY OF ANY KIND BY AMPLIFY. AMPLIFY EXPRESSLY DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED, INCLUDING ANY WARRANTY AS TO TITLE, NON-INFRINGEMENT, MERCHANTABILITY, OR FITNESS FOR A PARTICULAR PURPOSE OR USE. CUSTOMER ASSUMES RESPONSIBILITY FOR SELECTING THE PRODUCTS TO ACHIEVE CUSTOMER'S INTENDED RESULTS AND FOR THE ACCESS AND USE OF THE PRODUCTS, INCLUDING THE RESULTS OBTAINED FROM THE PRODUCTS. WITHOUT LIMITING THE FOREGOING, AMPLIFY MAKES NO WARRANTY THAT THE PRODUCTS WILL BE ERROR-FREE OR FREE FROM INTERRUPTIONS OR OTHER FAILURES OR WILL MEET CUSTOMER'S REQUIREMENTS. AMPLIFY IS NEITHER RESPONSIBLE NOR LIABLE FOR ANY THIRD-PARTY CONTENT OR SOFTWARE INCLUDED IN PRODUCTS, INCLUDING THE ACCURACY, INTEGRITY, COMPLETENESS, QUALITY, LEGALITY, USEFULNESS, OR SAFETY OF, OR IP RIGHTS RELATING TO, SUCH THIRD-PARTY CONTENT AND SOFTWARE. ANY ACCESS TO OR USE OF SUCH THIRD-PARTY CONTENT AND SOFTWARE MAY BE SUBJECT TO THE TERMS AND CONDITIONS AND INFORMATION COLLECTION, USAGE, AND DISCLOSURE PRACTICES OF THIRD PARTIES.

12. Limitation of Liability. IN NO EVENT WILL AMPLIFY BE LIABLE TO CUSTOMER OR TO ANY AUTHORIZED USER FOR ANY INCIDENTAL, SPECIAL, CONSEQUENTIAL, PUNITIVE, RELIANCE, OR COVER DAMAGES, DAMAGES FOR LOST PROFITS, LOST DATA OR LOST BUSINESS, OR ANY OTHER INDIRECT DAMAGES, EVEN IF AMPLIFY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. TO THE EXTENT PERMITTED BY APPLICABLE LAW, AMPLIFY'S ENTIRE LIABILITY TO

CUSTOMER OR ANY AUTHORIZED USER ARISING OUT OF PERFORMANCE OR NONPERFORMANCE BY AMPLIFY OR IN ANY WAY RELATED TO THE SUBJECT MATTER OF THIS AGREEMENT, REGARDLESS OF WHETHER THE CLAIM FOR SUCH DAMAGES IS BASED IN CONTRACT, TORT, STRICT LIABILITY, OR OTHERWISE, MAY NOT EXCEED THE AGGREGATE OF CUSTOMER'S OR ANY AUTHORIZED USER'S DIRECT DAMAGES UP TO THE FEES PAID BY CUSTOMER TO AMPLIFY FOR THE AFFECTED PORTION OF THE PRODUCTS IN THE PRIOR 12-MONTH PERIOD. UNDER NO CIRCUMSTANCES WILL AMPLIFY BE LIABLE FOR ANY CONSEQUENCES OF ANY UNAUTHORIZED USE OF THE PRODUCTS THAT VIOLATES THIS AGREEMENT OR ANY APPLICABLE LAW OR REGULATION.

13. Term/Termination. This Agreement will be in effect for the Term and may be renewed or extended by mutual agreement of the parties. Without prejudice to any rights either party may have under this Agreement, in law, equity, or otherwise, a party will have the right to terminate this Agreement if the other party (or in the case of Amplify, an Authorized School User) materially breaches any term, provision, warranty, or representation under this Agreement and fails to correct the breach within 30 days of its receipt of written notice thereof. Upon termination, Customer will: (a) cease using the Products, (b) return, purge, or destroy (as directed by Amplify) all copies of any Products and, if so requested, certify to Amplify in writing that such surrender or destruction has occurred, (c) pay any fees due and owing hereunder, and (d) not be entitled to a refund of any fees previously paid, unless otherwise specified in the Quote. Customer will be responsible for the cost of any continued use of the Products following termination. Upon termination, Amplify will return or destroy any Student Data provided to Amplify hereunder. Notwithstanding the foregoing, nothing will require Amplify to return or destroy any data that does not include Student Data, including de-identified information or data that is derived from access to Student Data but which does not contain Student Data. Sections 3–14 will survive the termination of this Agreement.

14. Miscellaneous. This Agreement, including all addenda, attachments, and the Quote, as applicable, constitutes the entire agreement between the parties relating to the subject matter hereof. The provisions of this Agreement will supersede any conflicting terms and conditions in any Customer purchase order, other correspondence or verbal communication, and will supersede and cancel all prior agreements, written or oral, between the parties relating to the subject matter hereof. This Agreement may not be modified except in writing signed by both parties. All defined terms in this Agreement will apply to their singular and plural forms, as applicable. The word "including" means "including without limitation." This Agreement will be governed by and construed and enforced in accordance with the laws of the U.S., state of New York, without giving effect to the choice of law rules thereof. This Agreement will be binding upon and inure to the benefit of the parties and their respective successors and assigns. The parties expressly understand and agree that their relationship is that of independent contractors. Nothing in this Agreement will constitute one party as an employee, agent, joint venture partner, or servant of another. Each party is solely responsible for all of its employees and agents and its labor costs and expenses arising in connection herewith. Neither this Agreement nor any of the rights, interests or obligations hereunder may be assigned or delegated by Customer or any Authorized School User without the prior written consent of Amplify. If one or more of the provisions contained in this Agreement will for any reason be held to be unenforceable at law, such provisions will be construed by the appropriate judicial body to limit or reduce such provision or provisions so as to be enforceable to the maximum extent compatible with applicable law. Amplify will have no liability to Customer or to third parties for any failure or delay in performing any obligation under this Agreement due to circumstances beyond its reasonable control, including acts of God or nature, fire, earthquake, flood, epidemic, pandemic, strikes, labor stoppages or slowdowns, civil disturbances or terrorism, national or regional emergencies, supply shortages or delays, action by any governmental authority, or interruptions in power, communications, satellites, the Internet, or any other network. Each party represents and warrants that it has all necessary right, power, and authority to enter into this Agreement and to comply with the obligations hereunder.

We are delighted to work with you and we thank you for your order!

Amplify Education, Inc. - Confidential Information



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

3/11/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Arthur J. Gallagher Risk Management Services, LLC 300 Madison Avenue, 28th Floor New York NY 10017	<b>CONTACT NAME:</b> Janice Hellmers <b>PHONE (A/C No. Ext):</b> 212-994-7100 <b>E-MAIL ADDRESS:</b> janice.hellmers@ajg.com		<b>FAX (A/C, No):</b> 212-994-7047
	<b>INSURER(S) AFFORDING COVERAGE</b>		
<b>INSURED</b> Amplify Education, Inc. 55 Washington Street, Ste 800 Brooklyn NY 11201	<b>INSURER A :</b> American Zurich Insurance Company		<b>NAIC #</b> 40142
	<b>INSURER B :</b> American Guarantee and Liability Ins Co		26247
	<b>INSURER C :</b> Zurich American Insurance Company		16535
	<b>INSURER D :</b>		
	<b>INSURER E :</b>		
<b>INSURER F :</b>			

**COVERAGES**

CERTIFICATE NUMBER: 2015675648

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Y		CPO 3294270-00	9/30/2023	9/30/2024	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
C	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			CPO 3294270-00	9/30/2023	9/30/2024	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$ 10,000			AUC 3294266-00	9/30/2023	9/30/2024	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000 Crisis Mgmt Service \$ 50,000
A	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	WC 3294268-00	9/30/2023	9/30/2024	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**  
 Lincolnwood School District 74 is an Additional Insured as respects General Liability policy, pursuant to and subject to the policy's terms, definitions, conditions and exclusions.

**CERTIFICATE HOLDER****CANCELLATION**
 Lincolnwood School District 74  
 6950 N. East Prairie Road  
 Lincolnwood IL 60712

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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# Executive Summary

## Finance Committee Meeting

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DATE: March 21, 2024

TOPIC: Donation from ROSE Foundation

PREPARED BY: Courtney Whited

Recommended for:

Action

Discussion

Information

Purpose/Background:

In accordance with District Policy 8:80, a donation approval is presented to Lincolnwood School District 74 for \$200.00 and \$60 of Smoothie King gift certificates from Recognize Our Staff's Excellence (ROSE) Foundation for costs related to staff recognition endeavors.

Fiscal Impact:

\$200 grant revenue

Recommendation:

The Finance Committee concurs with the Administration's recommendation to the Board of Education to accept the donation of \$200 and \$60 Smoothie King gift certificates from ROSE Foundation.







