

Fox Chapel Area School District

Agenda Study Session

October 2, 2023

Additional School Bus Drivers – 2023-2024 School Year

[illegible]

Fox Chapel Area School District

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October 2, 2023

Disbursements (Fund 10) – September 2023

Fund 10 Disbursements for the period of 9/1/2023-9/30/2023

Vendor Name	Budget Unit	Budget Unit Title	Account Code	Account Title	Transaction Amount
Check Disbursements					
21ST CENTURY CYBER CHARTER SCHOOL	1011100003900000	REG ED-SEC	562	TUITION-PA CHARTER SCHLS	\$13,083.20
A. G. MAURO CO. INC.	1026200003912001	OPER MNT-HS-MAINT	610	GENERAL SUPPLIES	\$1,436.00
A.W. BEATTIE CAREER CENTER	1013900003912290	VOC ED-HS-TVPRD	564	TUITION-VOCATIONAL ED	\$201,688.72
A/CAPA	1028180000000000	SYS TECH	810	DUES & FEES	\$240.00
AASA, THE SCHOOL SUP'TS ASSN.	1028340000000000	STF DV-N.INST CRT	810	DUES & FEES	\$3,850.00
AASA, THE SCHOOL SUP'TS ASSN.	1028341210000000	STFDV CRT N.INST-WPAL2025	810	DUES & FEES	\$3,850.00
ABDO-SPOTLIGHT-MAGIC WAGON	1022500001905000	LIBR SRV-FV	640	BOOKS	\$1,008.80
ACHIEVEMENT HOUSE CYBER CHARTER SCH	1012900003900310	OTHR SPT-SEC-SPED	562	TUITION-PA CHARTER SCHLS	\$3,439.60
ADAM E DANIELSON	1022710000000000	STF DV INST CRT	580	TRAVEL	\$108.73
ADVANCE AUTO PARTS	1026200003912001	OPER MNT-HS-MAINT	610	GENERAL SUPPLIES	\$70.09
ADVANTAGE SPORT & FITNESS INC.	1032501523912550	ATH-ATHACT-HS-ATHLE	610	GENERAL SUPPLIES	\$1,295.00
AEC GROUP LLC.	1021240000000000	INFO SRV	766	CAP REPLACE TECH EQUIP	\$67,710.73
AEC GROUP LLC.	1021249900000000	INFO/DATA-ESSER III	766	CAP REPLACE TECH EQUIP	\$91,667.00
AGORA CYBER CHARTER SCHOOL	1012900003900310	OTHR SPT-SEC-SPED	562	TUITION-PA CHARTER SCHLS	\$10,318.23
AGORA CYBER CHARTER SCHOOL	1011100003900000	REG ED-SEC	562	TUITION-PA CHARTER SCHLS	\$5,082.84
	1000000000000000	REV	R6740	FEES COLLECT FROM STUD	\$19.00
AIU	1022804212910000	NPUBL SPT-TITL2-DMS	329	PROF EDUCATIONAL SERVICES	\$708.28
ALAN CHEN	1028180000000000	SYS TECH	580	TRAVEL	\$124.06
ALAN FEAR	1011100003912121	REG ED-HS-MUSIC	329	PROF EDUCATIONAL SERVICES	\$1,200.00
ALLEGHENY INTERMEDIATE UNIT	1012900003912310	OTHR SPT-HS-SPED	322	AIU SERVICES	\$83,213.19
ALLEGHENY INTERMEDIATE UNIT	1011100003912153	REG ED-HS-ESL	322	AIU SERVICES	\$154.85
ALLEGHENY INTERMEDIATE UNIT	1022710000000000	STF DV INST CRT	329	PROF EDUCATIONAL SERVICES	\$3,800.00
ALLEGHENY INTERMEDIATE UNIT	1022714211900000	STF DV INST CRT-TITL2-EL	329	PROF EDUCATIONAL SERVICES	\$9,500.00
ALLEGHENY WINDOW CLEANING INC.	1026200001905000	OPER MNT-FV	431	BUILDING MAINTENANCE	\$1,560.00
ALLEGHENY WINDOW CLEANING INC.	1026200003912000	OPER MNT-HS	431	BUILDING MAINTENANCE	\$2,600.00
ALLEGHENY WINDOW CLEANING INC.	1026200001908000	OPER MNT-HW	431	BUILDING MAINTENANCE	\$650.00
ALLEGHENY WINDOW CLEANING INC.	1026200001907000	OPER MNT-KR	431	BUILDING MAINTENANCE	\$2,080.00
ALLEGHENY WINDOW CLEANING INC.	1026200001904000	OPER MNT-OH	431	BUILDING MAINTENANCE	\$2,600.00
ALLEGIANCE STAFFING	1022400000000000	COMP ASST	329	PROF EDUCATIONAL SERVICES	\$433.00
ALLEGIANCE STAFFING	1026200003912000	OPER MNT-HS	329	PROF EDUCATIONAL SERVICES	\$1,948.80
ALLEGIANCE STAFFING	1026200001904000	OPER MNT-OH	329	PROF EDUCATIONAL SERVICES	\$2,481.22
AMERICAN EXPRESS	1023600000000103	SUPERINT-ASUPT	810	DUES & FEES	\$613.00
AMERICAN UNIVERSITY	1032100003912510	STUD ACT-HS-ACTIV	810	DUES & FEES	\$2,215.00
	1000001503912000	REV-COLLC-HS	R6740	FEES COLLECT FROM STUD	\$95.00
ANDREW KING	1051300000000000	PRIOR YR	880	REFUNDS PRIOR YRS RECPTS	\$235.60
ANDREWS AND PRICE	1012430002910390	GIFTED-DMS-SPPRG	810	DUES & FEES	\$120.00
ANDREWS AND PRICE	10235000000000310	LEGAL SRV-SPED	330	PROFESSIONAL SERVICES	\$276.00
ANNE ENGLERT	1011100003912121	REG ED-HS-MUSIC	329	PROF EDUCATIONAL SERVICES	\$1,750.00
APPLE INC.	1022713600000000	STF DEV-CRT/INS-HLTH SFTY	329	PROF EDUCATIONAL SERVICES	\$2,900.00
ARETEL LABS, INC.	1012430003912390	GIFTED-HS-SPPRG	810	DUES & FEES	\$295.00
ARMSTRONG TOOL & SUPPLY COMPANY	1011100003912122	REG ED-HS-ART	610	GENERAL SUPPLIES	\$1,111.80
ASHLEY LYNN CONSTANTINE-HARRIS	1028340000000000	STF DV-N.INST CRT	580	TRAVEL	\$26.66
B & R POOLS	1026200003912000	OPER MNT-HS	431	BUILDING MAINTENANCE	\$1,309.00
B&H PHOTO-VIDEO INC.	1011100003912122	REG ED-HS-ART	762	CAP REPLACE EQUIP	\$2,393.90
BALDWIN CROSS COUNTRY CLUB	1032500003912552	ATH-VAR-B-XCNTRY	810	DUES & FEES	\$164.00
BALDWIN CROSS COUNTRY CLUB	1032500003912565	ATH-VAR-G-XCNTRY	810	DUES & FEES	\$164.00
BATTERY OUTLET PLUS	1026200003912001	OPER MNT-HS-MAINT	610	GENERAL SUPPLIES	\$1,083.70
BAUDVILLE INC.	1011100002910000	REG ED-DMS	610	GENERAL SUPPLIES	\$759.44
BERKS COUNTY INTERMEDIATE UNIT	1023300000000000	TAX SRV	658	TECH SUPPLIES	\$3,380.00
BIG'S SANITATION INC	1026200002910000	OPER MNT-DMS	431	BUILDING MAINTENANCE	\$607.76
BIG'S SANITATION INC	1026200001905000	OPER MNT-FV	431	BUILDING MAINTENANCE	\$303.88
BIG'S SANITATION INC	1026200003912000	OPER MNT-HS	431	BUILDING MAINTENANCE	\$1,291.58
BIG'S SANITATION INC	1026200001908000	OPER MNT-HW	431	BUILDING MAINTENANCE	\$303.88
BIG'S SANITATION INC	1026200001907000	OPER MNT-KR	431	BUILDING MAINTENANCE	\$303.88
BIG'S SANITATION INC	1026200001904000	OPER MNT-OH	431	BUILDING MAINTENANCE	\$303.88
BLICK ART MATERIALS	1011100002910122	REG ED-DMS-ART	610	GENERAL SUPPLIES	\$183.98
BLICK ART MATERIALS	1011100003912122	REG ED-HS-ART	610	GENERAL SUPPLIES	\$980.11
BSN SPORTS	1032500003912562	ATH-VAR-FLD HCKY	610	GENERAL SUPPLIES	\$4,910.00
CANZIAN/JOHNSTON & ASSOCIATES LLC	1046009902910000	CONSTRUC-ARP-DMS	330	PROFESSIONAL SERVICES	\$4,500.00
CARA ELIZABETH ZLATOS	1022710000000000	STF DV INST CRT	580	TRAVEL	\$126.33
CAROLINA BIOLOGICAL SUPPLY COMPANY	1011100003912180	REG ED-HS-SCIEN	610	GENERAL SUPPLIES	\$545.10
CATALYST ACADEMY CHARTER SCHOOL	1011100001900000	REG ED-EL	562	TUITION-PA CHARTER SCHLS	\$3,270.80
CENGAGE LEARNING	1011100003912170	REG ED-HS-MATH	640	BOOKS	\$21,649.06
CENTRAL SUSQUEHANNA I.U.	1012900003912310	OTHR SPT-HS-SPED	322	AIU SERVICES	\$461.00
CENTURY SPORTS	1032500002910569	ATH-DMS-G-SCCR	610	GENERAL SUPPLIES	\$1,640.35

CENTURY SPORTS	1032500003412553	ATH-JV-B-GOLF	610	GENERAL SUPPLIES	\$1,187.55
CENTURY SPORTS	1032500003412569	ATH-JV-G-SCCR	610	GENERAL SUPPLIES	\$821.88
CENTURY SPORTS	1032500003412572	ATH-JV-G-VOLY	610	GENERAL SUPPLIES	\$260.30
CENTURY SPORTS	1032500003912553	ATH-VAR-B-GOLF	610	GENERAL SUPPLIES	\$1,187.55
CENTURY SPORTS	1032500003912562	ATH-VAR-FLD HCKY	610	GENERAL SUPPLIES	\$948.88
CENTURY SPORTS	1032500003912569	ATH-VAR-G-SCCR	610	GENERAL SUPPLIES	\$821.89
CENTURY SPORTS	1032500003912572	ATH-VAR-G-VOLY	610	GENERAL SUPPLIES	\$260.31
CENTURY SPORTS	1032500003912575	ATH-VAR-WRESTLING	610	GENERAL SUPPLIES	\$807.19
CENVEO WORLDWIDE LIMITED	1025110000000000	BUSINESS	610	GENERAL SUPPLIES	\$59.90
CENVEO WORLDWIDE LIMITED	1011100002910000	REG ED-DMS	610	GENERAL SUPPLIES	\$331.68
CHILDREN'S INSTITUTE	1012900002900310	OTHR SPT-MS-SPED	567	TUITION-APS	\$17,848.25
COMDOC INC.	1025400000000000	PRINTING	610	GENERAL SUPPLIES	\$836.79
COMDOC INC.	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$125.82
COMDOC INC.	1025400001907000	PRINTING-KR	448	LEASE OF TECH SERVICES	\$1,610.51
COMDOC INC.	1011100002910150	REG ED-DMS-LANG	658	TECH SUPPLIES	\$799.00
COMMITTEE FOR CHILDREN	1021200002910000	GUIDANCE-DMS	658	TECH SUPPLIES	\$2,719.00
CONSOLIDATED COMMUNICATIONS	1026200000000000	OPER MNT	538	TELECOMMUNICATIONS	\$892.35
CONTRACT PAPER GROUP INC.	1025110000000000	BUSINESS	610	GENERAL SUPPLIES	\$1,584.00
CONTRACT PAPER GROUP INC.	1025400000000000	PRINTING	610	GENERAL SUPPLIES	\$10,348.60
CONTRACT PAPER GROUP INC.	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$7,089.01
CONVERGINT TECHNOLOGIES LLC	1026603600000000	SECURITY SERV-HLTH SFTY	758	CAP NEW TECH SOFTWARE	\$11,058.45
CONVERGINT TECHNOLOGIES LLC	1026600000000000	SECURITY	432	REPAIR OF EQUIPMENT	\$1,490.00
CORELOGIC CENTRALIZED REFUNDS	1000000140000000	REV-INDNA	R6111	CURRENT REAL ESTATE TAXES	\$83.31
COUNTY OF ALLEGHENY LODGE #91 FOP	1026600000000000	SECURITY	810	DUES & FEES	\$225.00
COUNTY OF ALLEGHENY LODGE #91 FOP	1026600002910000	SECURITY-DMS	810	DUES & FEES	\$225.00
COUNTY OF ALLEGHENY LODGE #91 FOP	1026600001905000	SECURITY-FV	810	DUES & FEES	\$225.00
COUNTY OF ALLEGHENY LODGE #91 FOP	1026600003912000	SECURITY-HS	810	DUES & FEES	\$450.00
COUNTY OF ALLEGHENY LODGE #91 FOP	1026600001908000	SECURITY-HW	810	DUES & FEES	\$225.00
COUNTY OF ALLEGHENY LODGE #91 FOP	1026600001907000	SECURITY-KR	810	DUES & FEES	\$225.00
COUNTY OF ALLEGHENY LODGE #91 FOP	1026600001904000	SECURITY-OH	810	DUES & FEES	\$225.00
D7WA -- NORWIN HIGH SCHOOL	1032500002910575	ATH-DMS-WRESTLING	810	DUES & FEES	\$300.00
DANA LYNNE SIMILE	1028340000000000	STF DV-N.INST CRT	240	TUITION REIMBURSEMENT	\$2,056.20
DANIEL BREITKREUTZ	1026110003912000	SPV MAINT-HS	580	TRAVEL	\$149.58
	1000001033912000	REV-WPA-HS	R6740	FEES COLLECT FROM STUD	\$100.00
DEER LAKES SCHOOL DISTRICT	1011100003900000	REG ED-SEC	561	TUITION TO OTHER LEA IN P	\$6,675.00
DEMCO INC.	1022500002910000	LIBR SRV-DMS	610	GENERAL SUPPLIES	\$664.88
DEMCO INC.	1022500003912000	LIBR SRVC-HS	610	GENERAL SUPPLIES	\$236.95
DEPAUL SCHOOL FOR HEARING AND SPEEC	1012210002910310	HEAR SPT-DMS-SPED	329	PROF EDUCATIONAL SERVICES	\$779.21
DEPAUL SCHOOL FOR HEARING AND SPEEC	1012210001904310	HEAR SPT-OH-SPED	329	PROF EDUCATIONAL SERVICES	\$257.21
DEPAUL SCHOOL FOR HEARING AND SPEEC	1012110003912310	LIFE SKIL-HS-SPED	329	PROF EDUCATIONAL SERVICES	\$257.21
DESANTIS SOLUTIONS	1026200002910000	OPER MNT-DMS	610	GENERAL SUPPLIES	\$1,775.00
DESANTIS SOLUTIONS	1026200001905001	OPER MNT-FV-MAINT	610	GENERAL SUPPLIES	\$195.99
DESANTIS SOLUTIONS	1026200003912000	OPER MNT-HS	610	GENERAL SUPPLIES	\$5.00
DESANTIS SOLUTIONS	1026200003912001	OPER MNT-HS-MAINT	610	GENERAL SUPPLIES	\$133.31
DIDAX	1011100001900000	REG ED-EL	610	GENERAL SUPPLIES	\$104.88
DISTRICT VII ATHLETIC DIRECT. ASSC.	1032500003912000	ATHLETIC-HS	810	DUES & FEES	\$150.00
DQE COMMUNICATIONS	1026200000000000	OPER MNT	538	TELECOMMUNICATIONS	\$1,262.50
DUQUESNE CITY SCHOOL DISTRICT	1029903901900000	PASS THRU-PASMART-EL	899	PASS THRU FUNDS	\$9,847.65
DUQUESNE LIGHT COMPANY	1026200002910000	OPER MNT-DMS	622	ELECTRICITY	\$12,108.49
DUQUESNE LIGHT COMPANY	1026200001905000	OPER MNT-FV	622	ELECTRICITY	\$4,311.33
DUQUESNE LIGHT COMPANY	1026200003912000	OPER MNT-HS	622	ELECTRICITY	\$34,618.36
DUQUESNE LIGHT COMPANY	1026200001908000	OPER MNT-HW	622	ELECTRICITY	\$8,927.73
DUQUESNE LIGHT COMPANY	1026200001907000	OPER MNT-KR	622	ELECTRICITY	\$8,138.79
DUQUESNE LIGHT COMPANY	1026200001904000	OPER MNT-OH	622	ELECTRICITY	\$8,627.86
EAI EDUCATION	1011100001900110	REG ED-EL-GNRL	610	GENERAL SUPPLIES	\$7,168.60
EAI EDUCATION	1011100003912180	REG ED-HS-SCIEN	610	GENERAL SUPPLIES	\$1,405.10
EASTERN AREA SPECIAL SCHOOLS JOINT	1012900003912310	OTHR SPT-HS-SPED	322	AIU SERVICES	\$7,000.00
EASY WAY SAFETY SERVICES, INC.	1012330001900310	AUTS SPT-EL-SPED	610	GENERAL SUPPLIES	\$215.00
EBSCO SUBSCRIPTION SERVICES	1022500001908000	LIBR SRV-HW	640	BOOKS	\$54.95
EBSCO SUBSCRIPTION SERVICES	1022500001907000	LIBR SRV-KR	640	BOOKS	\$199.95
EBSCO SUBSCRIPTION SERVICES	1022501073912000	LIBRARY SRV-GNRL-HS	640	BOOKS	\$846.15
EFCC ACQUISITION CORP.	1012110001900310	LIFE SKIL-EL-SPED	330	PROFESSIONAL SERVICES	\$2,831.75
ELIZABETH DINAPOLI	1000000140000000	REV-INDNA	R6111	CURRENT REAL ESTATE TAXES	\$1,455.07
EMILY PAIGE HUMISTON	1032500003912562	ATH-VAR-FLD HCKY	610	GENERAL SUPPLIES	\$290.00
EQUIPARTS	1026200002910001	OPER MNT-DMS-MAINT	610	GENERAL SUPPLIES	\$58.53
EQUIPARTS	1026200003912001	OPER MNT-HS-MAINT	610	GENERAL SUPPLIES	\$232.17
EQUIPARTS	1026200001907001	OPER MNT-KR-MAINT	610	GENERAL SUPPLIES	\$55.50
FIBER & CABLE SPECIALISTS, INC	1021240000000000	INFO SRV	438	REPAIR OF TECH EQUIP	\$4,185.50

FINALFORMS	1032500003912000	ATHLETIC-HS	658	TECH SUPPLIES	\$3,105.00
FINITURA INC	1025400000000000	PRINTING	610	GENERAL SUPPLIES	\$4,007.72
FINITURA INC	1025400000000000	PRINTING	432	REPAIR OF EQUIPMENT	\$366.75
FLINN SCIENTIFIC INC.	1011100003912180	REG ED-HS-SCIEN	610	GENERAL SUPPLIES	\$640.11
FOLLETT SCHOOL SOLUTIONS INC	1011100002910150	REG ED-DMS-LANG	640	BOOKS	\$1,917.00
FOX CHAPEL AUTHORITY	1026200001905000	OPER MNT-FV	424	WATER	\$2,211.34
FOX CHAPEL AUTHORITY	1026200001907000	OPER MNT-KR	424	WATER	\$3,065.93
FROSTY HOLLOW HARDWOODS	1011100003912270	REG ED-HS-TECHED	610	GENERAL SUPPLIES	\$3,030.00
GEORGE LEE	1000000110000000	REV-ASPWL	R6111	CURRENT REAL ESTATE TAXES	\$856.05
GEORGETOWN UNIVERSITY	1028360000000000	STF DV-NINST NCRT	360	EMPLOYEE TRAINING SERVICE	\$3,500.00
GLASS KALEIDOSCOPE	1011100003912122	REG ED-HS-ART	610	GENERAL SUPPLIES	\$400.00
GRAFIX BUSINESS SOLUTIONS, INC.	1011100002910000	REG ED-DMS	432	REPAIR OF EQUIPMENT	\$175.00
GRAFIX BUSINESS SOLUTIONS, INC.	1011100003912000	REG ED-HS	432	REPAIR OF EQUIPMENT	\$175.00
GRAFIX BUSINESS SOLUTIONS, INC.	1011100001907000	REG ED-KR	432	REPAIR OF EQUIPMENT	\$530.00
GRAINGER	1026200002910001	OPER MNT-DMS-MAINT	610	GENERAL SUPPLIES	\$364.40
GRAINGER	1026200003912001	OPER MNT-HS-MAINT	610	GENERAL SUPPLIES	\$1,288.05
GRAINGER	1026200001907001	OPER MNT-KR-MAINT	610	GENERAL SUPPLIES	\$193.94
GRAINGER	1026200001904001	OPER MNT-OH-MAINT	610	GENERAL SUPPLIES	\$75.36
GREAT MINDS PBC	1011100001900110	REG ED-EL-GNRL	640	BOOKS	\$20,596.42
GREATAMERICA FINANCIAL SERVICES	1025400000000000	PRINTING	448	LEASE OF TECH SERVICES	\$320.16
GRIMCO, INC	1025400000000000	PRINTING	610	GENERAL SUPPLIES	\$171.17
GUMPHER ELECTRICAL SERVICES	1026200003912000	OPER MNT-HS	431	BUILDING MAINTENANCE	\$443.37
HAB-DLT (ER)	10	GENERAL FUND	0462.005	COURT-ORDER DEDUCTS-EE	\$62.99
HAMPTON OFFICE PRODUCTS	1011100002910000	REG ED-DMS	610	GENERAL SUPPLIES	\$628.52
HARMAR TIRE & SERVICE	1026500003912000	VEHIC MNT-HS	433	REPAIR OF VEHICLES	\$82.11
HEATH R ASBURY	1022710000000000	STF DV INST CRT	580	TRAVEL	\$119.33
HF GROUP	1025110000000000	BUSINESS	550	PRINTING	\$163.94
HOME DEPOT CREDIT SERVICES	1026200002910001	OPER MNT-DMS-MAINT	610	GENERAL SUPPLIES	\$37.00
HOME DEPOT CREDIT SERVICES	1026200001908001	OPER MNT-HW-MAINT	610	GENERAL SUPPLIES	\$39.20
HOME DEPOT CREDIT SERVICES	1011100003912122	REG ED-HS-ART	610	GENERAL SUPPLIES	\$195.81
HOME DEPOT CREDIT SERVICES	1011100003912270	REG ED-HS-TECHED	610	GENERAL SUPPLIES	\$70.84
HONG KIM VU	1000000160000000	REV-SHARP	R6111	CURRENT REAL ESTATE TAXES	\$5.00
HORIZON INFORMATION SERVICES	1021240000000000	INFO SRV	438	REPAIR OF TECH EQUIP	\$4,671.00
HORIZON INFORMATION SERVICES	1032500002910000	ATHLETIC-DMS	658	TECH SUPPLIES	\$3,188.00
HORIZON MARKETING GROUP	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$1,100.00
HOUGHTON-MIFFLIN-HARCOURT	1011109902910150	REG ED-ARP-DMS-READ	640	BOOKS	\$27,137.74
HOUGHTON-MIFFLIN-HARCOURT	1011100001900110	REG ED-EL-GNRL	640	BOOKS	\$281,588.43
HOUGHTON-MIFFLIN-HARCOURT	1011109901900000	REG ED-ESSER III-ELEM	640	BOOKS	\$4,448.85
HOUGHTON-MIFFLIN-HARCOURT	1011100001908000	REG ED-HW	610	GENERAL SUPPLIES	\$107.88
INSTITUTIONAL SPECIALTIES INC.	1032500003912000	ATHLETIC-HS	431	BUILDING MAINTENANCE	\$125.00
INTERIOR SUPPLY	1046000001907000	CONSTRUC-KR	610	GENERAL SUPPLIES	\$527.36
IXL LEARNING	1012900001904310	OTHR SPT-OH-SPED	658	TECH SUPPLIES	\$299.00
J. APPLESEED	1022501073912000	LIBRARY SRV-GNRL-HS	640	BOOKS	\$337.55
J. W. PEPPER & SON INC.	1011100002910123	REG ED-DMS-BAND	640	BOOKS	\$142.45
J. W. PEPPER & SON INC.	1011100002910121	REG ED-DMS-MUSIC	610	GENERAL SUPPLIES	\$806.99
J.C. EHRLICH CO. INC.	1026200002910000	OPER MNT-DMS	431	BUILDING MAINTENANCE	\$43.20
J.C. EHRLICH CO. INC.	1026200001905000	OPER MNT-FV	431	BUILDING MAINTENANCE	\$43.20
J.C. EHRLICH CO. INC.	1026200003912000	OPER MNT-HS	431	BUILDING MAINTENANCE	\$87.48
J.C. EHRLICH CO. INC.	1026200001908000	OPER MNT-HW	431	BUILDING MAINTENANCE	\$47.52
J.C. EHRLICH CO. INC.	1026200001907000	OPER MNT-KR	431	BUILDING MAINTENANCE	\$43.20
J.C. EHRLICH CO. INC.	1026200001904000	OPER MNT-OH	431	BUILDING MAINTENANCE	\$71.28
JANITORS SUPPLY INC.	1026200002910000	OPER MNT-DMS	610	GENERAL SUPPLIES	\$13,068.32
JANITORS SUPPLY INC.	1026200001905000	OPER MNT-FV	610	GENERAL SUPPLIES	\$7,222.31
JANITORS SUPPLY INC.	1026200003912000	OPER MNT-HS	610	GENERAL SUPPLIES	\$22,225.28
JANITORS SUPPLY INC.	1026200001908000	OPER MNT-HW	610	GENERAL SUPPLIES	\$6,203.40
JANITORS SUPPLY INC.	1026200001907000	OPER MNT-KR	610	GENERAL SUPPLIES	\$8,661.40
JANITORS SUPPLY INC.	1026200001904000	OPER MNT-OH	610	GENERAL SUPPLIES	\$10,872.26
JENNIFER DEPOLI ANTONIKAS	1011100003912240	REG ED-HS-FAMILY	610	GENERAL SUPPLIES	\$54.90
JENNIFER K BILLINGS	1022710000000000	STF DV INST CRT	580	TRAVEL	\$128.30
	1000001501904000	REV-COLLG-OH	R6740	FEES COLLECT FROM STUD	\$10.00
JML LANDSCAPE MANAGEMENT	1026200002910000	OPER MNT-DMS	431	BUILDING MAINTENANCE	\$1,912.58
JML LANDSCAPE MANAGEMENT	1026200001905000	OPER MNT-FV	431	BUILDING MAINTENANCE	\$992.25
JML LANDSCAPE MANAGEMENT	1026200003912000	OPER MNT-HS	431	BUILDING MAINTENANCE	\$4,121.83
JML LANDSCAPE MANAGEMENT	1026200001908000	OPER MNT-HW	431	BUILDING MAINTENANCE	\$1,701.33
JML LANDSCAPE MANAGEMENT	1026200001907000	OPER MNT-KR	431	BUILDING MAINTENANCE	\$2,524.00
JML LANDSCAPE MANAGEMENT	1026200001904000	OPER MNT-OH	431	BUILDING MAINTENANCE	\$2,668.83
	1000001033912000	REV-WPA-HS	R6740	FEES COLLECT FROM STUD	\$100.00
JOHNSON CONTROLS FIRE PROTECTION LP	1026200003912000	OPER MNT-HS	431	BUILDING MAINTENANCE	\$4,056.74

JOHNSON CONTROLS FIRE PROTECTION LP	1026200001907000	OPER MNT-KR	431	BUILDING MAINTENANCE	\$911.20
JOHNSON CONTROLS INC	1026200001907000	OPER MNT-KR	431	BUILDING MAINTENANCE	\$5,958.44
JONATHAN MONROE	1032100003912510	STUD ACT-HS-ACTIV	329	PROF EDUCATIONAL SERVICES	\$50.00
JORDAN TAX SERVICE INC.	1023300000000000	TAX SRV	310	ADMINISTRATIVE SERVICES	\$150.85
JOSHUA D DUSO	1011100002910240	REG ED-DMS-FAMLY	610	GENERAL SUPPLIES	\$363.39
KATELYN ELIZABETH FANNING	1022710001904000	STF DV INST CRT-OH	240	TUITION REIMBURSEMENT	\$4,363.56
KATHRYN L MUELLER	1022710000000000	STF DV INST CRT	580	TRAVEL	\$126.33
KAYLEE NICOLE KREPPS	1022710001904000	STF DV INST CRT-OH	240	TUITION REIMBURSEMENT	\$3,096.00
KELLY SERVICES INC.	1023800000000000	PRINC SRV	329	PROF EDUCATIONAL SERVICES	\$15,799.24
KELLY SERVICES INC.	1011100002910110	REG ED-DMS-GENRL	329	PROF EDUCATIONAL SERVICES	\$4,482.02
KELLY SERVICES INC.	1011100001905110	REG ED-FV-GENRL	329	PROF EDUCATIONAL SERVICES	\$2,271.38
KELLY SERVICES INC.	1011100003912110	REG ED-HS-GENRL	329	PROF EDUCATIONAL SERVICES	\$5,475.13
KELLY SERVICES INC.	1011100001908110	REG ED-HW-GENRL	329	PROF EDUCATIONAL SERVICES	\$1,657.13
KELLY SERVICES INC.	1011100001907110	REG ED-KR-GENRL	329	PROF EDUCATIONAL SERVICES	\$4,677.76
KELLY SERVICES INC.	1011100001904110	REG ED-OH-GENRL	329	PROF EDUCATIONAL SERVICES	\$6,534.00
KERR PTO	1033004111907000	COMM SRV-TITL1-KR	635	MEALS/REFRESHMENTS	\$277.02
KEVIN LEOBEUF	1011100003912121	REG ED-HS-MUSIC	329	PROF EDUCATIONAL SERVICES	\$3,250.00
KISKI AREA SCHOOL DISTRICT	1032500003912552	ATH-VAR-B-XCENTRY	810	DUES & FEES	\$187.00
KISKI AREA SCHOOL DISTRICT	1032500003912565	ATH-VAR-G-XCENTRY	810	DUES & FEES	\$187.00
KISKI AREA SCHOOL DISTRICT	1032500003912000	ATHLETIC-HS	810	DUES & FEES	\$262.00
KISKI JR HIGH WRESTLING BOOSTERS	1032500002910575	ATH-DMS-WRESTLING	810	DUES & FEES	\$350.00
KOLTON LANDSCAPING, LLC	1026200003912000	OPER MNT-HS	431	BUILDING MAINTENANCE	\$5,750.00
KRISTY LYNNE BATIS	1023800001904000	PRINC SRV-OH	810	DUES & FEES	\$155.89
KURTZ BROTHERS	1011100003912150	REG ED-HS-LANG	610	GENERAL SUPPLIES	\$85.75
	1000000000000000	REV	R6740	FEES COLLECT FROM STUD	\$21.00
	1000000000000000	REV	R6740	FEES COLLECT FROM STUD	\$25.00
LAURA MARIE MILLER	1023800002910000	PRINC SRV-DMS	580	TRAVEL	\$62.62
LEADER SERVICES	1028180000000000	SYS TECH	658	TECH SUPPLIES	\$16,780.00
LIBERTY DISTRIBUTORS, INC.	1026200003912000	OPER MNT-HS	610	GENERAL SUPPLIES	\$314.84
	1000001503912000	REV-COLLG-HS	R6740	FEES COLLECT FROM STUD	\$570.00
LINS ELEVATOR SERVICE, INC.	1026200002910000	OPER MNT-DMS	431	BUILDING MAINTENANCE	\$2,535.62
LINS ELEVATOR SERVICE, INC.	1026200003912000	OPER MNT-HS	431	BUILDING MAINTENANCE	\$673.62
LINS ELEVATOR SERVICE, INC.	1026200001907000	OPER MNT-KR	431	BUILDING MAINTENANCE	\$1,402.83
LINS ELEVATOR SERVICE, INC.	1026200001904000	OPER MNT-OH	431	BUILDING MAINTENANCE	\$337.83
	1000001503912000	REV-COLLG-HS	R6740	FEES COLLECT FROM STUD	\$95.00
LOWE'S BUSINESS ACCOUNT	1026200001908001	OPER MNT-HW-MAINT	610	GENERAL SUPPLIES	\$28.47
	1000001033912000	REV-WPA-HS	R6740	FEES COLLECT FROM STUD	\$100.00
LUGAILA MECHANICAL INC.	1026200002910000	OPER MNT-DMS	431	BUILDING MAINTENANCE	\$8,025.00
LUGAILA MECHANICAL INC.	1026200001905000	OPER MNT-FV	431	BUILDING MAINTENANCE	\$10,230.00
LUGAILA MECHANICAL INC.	1026200003912000	OPER MNT-HS	431	BUILDING MAINTENANCE	\$25,050.00
LUKE THOMAS BARKLEY	1028180000000000	SYS TECH	580	TRAVEL	\$56.66
	1000001501908000	REV-COLLG-HW	R6740	FEES COLLECT FROM STUD	\$5.00
MANNIX GABRIEL MCKAVENEY	1022400000000000	COMP ASST	580	TRAVEL	\$1.31
MARIA MCKAMISH STEWART	1022710000000000	STF DV INST CRT	580	TRAVEL	\$130.43
MARY CATHERINE RELJAC	1028340000000000	STF DV-N.INST CRT	580	TRAVEL	\$15.85
MARY CATHERINE RELJAC	1023600000000000	SUPERINT	580	TRAVEL	\$20.24
MARY JO MONTGOMERY	1032100003912510	STUD ACT-HS-ACTIV	580	TRAVEL	\$27.60
MARYJANE D BASH	1028180000000000	SYS TECH	580	TRAVEL	\$21.61
MATTHEW J HARRIS	1028340000000000	STF DV-N.INST CRT	580	TRAVEL	\$60.92
MATTHEW LAWRENCE KAMENICKY	1022710002910000	STF DV INST CRT-DMS	240	TUITION REIMBURSEMENT	\$4,200.00
MAX JAHNKE	1011100003912121	REG ED-HS-MUSIC	329	PROF EDUCATIONAL SERVICES	\$1,800.00
MCGRW-HILL SCHOOL EDUCATION, LLC	1011109901900000	REG ED-ESSER III-ELEM	640	BOOKS	\$3,200.15
MCGRW-HILL SCHOOL EDUCATION, LLC	1011100001900110	REG ED-EL-GNRL	658	TECH SUPPLIES	\$90.12
MELISSA ELIZABETH WIEST	1028180000000000	SYS TECH	580	TRAVEL	\$34.89
	1000001033912000	REV-WPA-HS	R6740	FEES COLLECT FROM STUD	\$100.00
MICAELA LYNN DIFRANCESCA	1022710001904000	STF DV INST CRT-OH	240	TUITION REIMBURSEMENT	\$1,695.00
	1000001503912000	REV-COLLG-HS	R6740	FEES COLLECT FROM STUD	\$95.00
MICHAEL L O'BRIEN	1032500003912000	ATHLETIC-HS	580	TRAVEL	\$360.97
MIGUEL A. SAGUE JR.	1023800003912000	PRINC SRV-HS	329	PROF EDUCATIONAL SERVICES	\$100.00
MILUSKA TRIVENO LAUTERBACH	1022710001907000	STF DV INST CRT-KR	240	TUITION REIMBURSEMENT	\$1,701.00
MOBILE COMMUNICATION SERVICE, INC.	1026600000000000	SECURITY	610	GENERAL SUPPLIES	\$2,275.38
MODEL CLEANERS UNIFORMS & APPAREL L	1011100003912121	REG ED-HS-MUSIC	415	LAUNDRY SERVICES	\$4,403.80
MONTROSE ENVIRONMENTAL SOLUTIONS	1026200002910000	OPER MNT-DMS	431	BUILDING MAINTENANCE	\$300.00
MONTROSE ENVIRONMENTAL SOLUTIONS	1026200003912000	OPER MNT-HS	431	BUILDING MAINTENANCE	\$500.00
MONTROSE ENVIRONMENTAL SOLUTIONS	1026200001904000	OPER MNT-OH	431	BUILDING MAINTENANCE	\$200.00
MR. JOHN	1032500002910000	ATHLETIC-DMS	431	BUILDING MAINTENANCE	\$463.00
MUNICIPAL AUTH. OF OAKMONT	1026200002910000	OPER MNT-DMS	424	WATER	\$360.94
MUNICIPAL AUTH. OF OAKMONT	1026200001908000	OPER MNT-HW	424	WATER	\$304.33

MUSIC IN MOTION	1011100002910123	REG ED-DMS-BAND	610	GENERAL SUPPLIES	\$1,200.04
N. CATH. SPCH. & DEBATE/BETH YOUNG	1032100003912510	STUD ACT-HS-ACTIV	810	DUES & FEES	\$58.00
N. GLANTZ & SON LLC	1025400000000000	PRINTING	610	GENERAL SUPPLIES	\$2,481.64
N. GLANTZ & SON LLC	1026600000000000	SECURITY	610	GENERAL SUPPLIES	\$457.52
NASCO	1011100001904122	REG ED-OH-ART	610	GENERAL SUPPLIES	\$39.79
	10235000000000310	LEGAL SRV-SPED	820	CLAIMS & JUDGEMENTS	\$52,902.50
NATIONAL ART EDUCATION ASSOCIATION	1011100003912122	REG ED-HS-ART	810	DUES & FEES	\$94.00
NAWA	1032500002910000	ATHLETIC-DMS	810	DUES & FEES	\$335.00
NICK WEBSTER	1032100003912510	STUD ACT-HS-ACTIV	329	PROF EDUCATIONAL SERVICES	\$100.00
NICOLAS ALEXANDAR LUCIANO	1022710000000000	STF DV INST CRT	580	TRAVEL	\$108.73
NORTH CATHOLIC HIGH SCH. FORENSICS	1032100003912510	STUD ACT-HS-ACTIV	810	DUES & FEES	\$64.00
NORTHERN ATHLETIC DIRECTORS ASSOCIA	1032500003912000	ATHLETIC-HS	810	DUES & FEES	\$200.00
NORTON GUSKY	1032500003912000	ATHLETIC-HS	329	PROF EDUCATIONAL SERVICES	\$450.00
NOVA SPORTS INC.	1032500003412563	ATH-JV-FBALL	431	BUILDING MAINTENANCE	\$528.90
NOVA SPORTS INC.	1032500003912563	ATH-VAR-FBALL	431	BUILDING MAINTENANCE	\$528.90
NOVA SPORTS INC.	1032500003412563	ATH-JV-FBALL	432	REPAIR OF EQUIPMENT	\$34.00
NOVA SPORTS INC.	1032500003912563	ATH-VAR-FBALL	432	REPAIR OF EQUIPMENT	\$34.00
OLIVIA JANE MCCALL	1022710001907000	STF DV INST CRT-KR	240	TUITION REIMBURSEMENT	\$551.70
OVERDRIVE INC.	1022503602910000	LIBRARY-SFTY HLTH-DMS	640	BOOKS	\$1,809.69
PA DEL TAX INC.	1023300000000000	TAX SRV	310	ADMINISTRATIVE SERVICES	\$5,496.07
PA DISTANCE LEARNING CHARTER SCHOOL	1012900001900310	OTHR SPT-EL-SPED	562	TUITION-PA CHARTER SCHLS	\$6,930.25
PA INTERSCHOLASTIC MARCHING BAND	1011100003912121	REG ED-HS-MUSIC	810	DUES & FEES	\$350.00
PA LEADERSHIP CHARTER SCHOOL	1012900003900310	OTHR SPT-SEC-SPED	562	TUITION-PA CHARTER SCHLS	\$3,439.60
PA LEADERSHIP CHARTER SCHOOL	1011100003900000	REG ED-SEC	562	TUITION-PA CHARTER SCHLS	\$1,694.28
PA PRINCIPALS ASSOCIATION	1023800003912000	PRINC SRV-HS	810	DUES & FEES	\$2,420.00
PAMELA S BARENTINE	1011100003912160	REG ED-HS-FORGN	580	TRAVEL	\$90.53
PASBO NORTHWEST FACILITIES MANAGERS	1026110000000000	SPV MAINT	810	DUES & FEES	\$20.00
PASCD	1022710000000000	STF DV INST CRT	810	DUES & FEES	\$65.00
	1000001033912000	REV-WPA-HS	R6740	FEES COLLECT FROM STUD	\$100.00
PAUL J. GIUFFRE ESQ. LLC	1023500000000000	LEGAL SRV	810	DUES & FEES	\$542.31
PAUL J. GIUFFRE ESQ. LLC	1023500000000000	LEGAL SRV	610	GENERAL SUPPLIES	\$110.90
PAUL J. GIUFFRE ESQ. LLC	1023300000000000	TAX SRV	610	GENERAL SUPPLIES	\$36.80
PAUL J. GIUFFRE ESQ. LLC	1023500000000000	LEGAL SRV	330	PROFESSIONAL SERVICES	\$13,253.00
PAUL J. GIUFFRE ESQ. LLC	1023300000000000	TAX SRV	330	PROFESSIONAL SERVICES	\$14,594.50
PAXTON/PATTERSON	1011100002910270	REG ED-DMS-TECHED	610	GENERAL SUPPLIES	\$85.23
PENA-PLAS	1026200003912001	OPER MNT-HS-MAINT	610	GENERAL SUPPLIES	\$384.92
PENN-TRAFFORD HIGH SCHOOL	1032500003912572	ATH-VAR-G-VOLY	810	DUES & FEES	\$225.00
PENN-WILKINS ASSOCIATES LLC	1051300000000000	PRIOR YR	880	REFUNDS PRIOR YRS RECPTS	\$13.43
PENNSYLVANIA CYBER CHARTER SCHOOL	1012900001900310	OTHR SPT-EL-SPED	562	TUITION-PA CHARTER SCHLS	\$14,737.03
PENNSYLVANIA CYBER CHARTER SCHOOL	1012900002900310	OTHR SPT-MS-SPED	562	TUITION-PA CHARTER SCHLS	\$19,155.26
PENNSYLVANIA CYBER CHARTER SCHOOL	1012900003900310	OTHR SPT-SEC-SPED	562	TUITION-PA CHARTER SCHLS	\$39,822.95
PENNSYLVANIA CYBER CHARTER SCHOOL	1011100001900000	REG ED-EL	562	TUITION-PA CHARTER SCHLS	\$17,280.93
PENNSYLVANIA CYBER CHARTER SCHOOL	1011100002900000	REG ED-MS	562	TUITION-PA CHARTER SCHLS	\$8,131.09
PENNSYLVANIA CYBER CHARTER SCHOOL	1011100003900000	REG ED-SEC	562	TUITION-PA CHARTER SCHLS	\$47,775.52
PEOPLES NATURAL GAS COMPANY	1026200002910000	OPER MNT-DMS	621	NATURAL GAS	\$719.35
PEOPLES NATURAL GAS COMPANY	1026200001905000	OPER MNT-FV	621	NATURAL GAS	\$192.42
PEOPLES NATURAL GAS COMPANY	1026200003912000	OPER MNT-HS	621	NATURAL GAS	\$2,632.96
PEOPLES NATURAL GAS COMPANY	1026200001908000	OPER MNT-HW	621	NATURAL GAS	\$455.54
PEOPLES NATURAL GAS COMPANY	1026200001907000	OPER MNT-KR	621	NATURAL GAS	\$1,310.75
PEOPLES NATURAL GAS COMPANY	1026200001904000	OPER MNT-OH	621	NATURAL GAS	\$1,126.10
PERFECTION LEARNING CORPORATION	1011100002910160	REG ED-DMS-FORGN	640	BOOKS	\$43.83
PERFORMANCE IN EDUCATION	1022804212910000	NPUBL SPT-TITL2-DMS	329	PROF EDUCATIONAL SERVICES	\$2,451.82
PERMA-BOUND	1011100003912150	REG ED-HS-LANG	640	BOOKS	\$9,309.00
PETROLEUM TRADERS	1027200000000000	STU TRANS	513	CONTRACTED TRANSPORTATION	\$40,466.61
PHASE 4 LEARNING CENTER INC.	1012900003900310	OTHR SPT-SEC-SPED	561	TUITION TO OTHER LEA IN P	\$12,750.00
PIAA	1032500003912552	ATH-VAR-B-XCNTRY	810	DUES & FEES	\$125.00
PIAA	1032500003912565	ATH-VAR-G-XCNTRY	810	DUES & FEES	\$125.00
PINNACLE GROUP INSURANCE	1023300000000000	TAX SRV	525	BONDING INSURANCE	\$605.32
PITNEY BOWES INC	1025110000000000	BUSINESS	442	RENTALS	\$207.00
PITTSBURGH BEHAVIORAL SERVICES	1012900001900310	OTHR SPT-EL-SPED	563	TUITION-NONPUBLIC SCHLS	\$5,950.00
PITTSBURGH POST-GAZETTE	1023100000000000	BOARD SRV	549	ADVERTISING	\$2,431.15
PMEA	1011100003912121	REG ED-HS-MUSIC	810	DUES & FEES	\$780.00
POWERSCHOOL GROUP LLC	1025110000000000	BUSINESS	658	TECH SUPPLIES	\$6,543.43
PRECISION HUMAN RESOURCE SOLUTIONS	1031000000000000	FOOD SERVICE	329	PROF EDUCATIONAL SERVICES	\$703.80
PRECISION HUMAN RESOURCE SOLUTIONS	1024400000000000	HLTH SRV	329	PROF EDUCATIONAL SERVICES	\$1,064.00
PRECISION HUMAN RESOURCE SOLUTIONS	1012410001900310	LRN SPT-EL-SPED	329	PROF EDUCATIONAL SERVICES	\$1,215.32
PRECISION HUMAN RESOURCE SOLUTIONS	1026200000000000	OPER MNT	329	PROF EDUCATIONAL SERVICES	\$6,360.00
PRECISION HUMAN RESOURCE SOLUTIONS	1023900003912000	OTH ADMIN-HS	329	PROF EDUCATIONAL SERVICES	\$1,325.03

PROVIDENT CHARTER SCHOOL	1012900001900310	OTHR SPT-EL-SPED	562	TUITION-PA CHARTER SCHLS	\$40,663.88
PROVIDENT CHARTER SCHOOL	1011100001900000	REG ED-EL	562	TUITION-PA CHARTER SCHLS	\$14,718.59
PTM DOCUMENT SYSTEMS	1025110000000000	BUSINESS	610	GENERAL SUPPLIES	\$15.02
PYRAMID SCHOOL PRODUCTS INC.	1032500003912561	ATH-VAR-CHEER	752	CAP NEW EQUIP	\$3,120.00
PYRAMID SCHOOL PRODUCTS INC.	1032500002910569	ATH-DMS-G-SCCR	610	GENERAL SUPPLIES	\$9.95
PYRAMID SCHOOL PRODUCTS INC.	1032500002310572	ATH-GR7-G-VOLY	610	GENERAL SUPPLIES	\$14.49
PYRAMID SCHOOL PRODUCTS INC.	1032500002410572	ATH-GR8-G-VOLY	610	GENERAL SUPPLIES	\$14.50
PYRAMID SCHOOL PRODUCTS INC.	1032500003412569	ATH-JV-G-SCCR	610	GENERAL SUPPLIES	\$41.93
PYRAMID SCHOOL PRODUCTS INC.	1032500003412572	ATH-JV-G-VOLY	610	GENERAL SUPPLIES	\$28.95
PYRAMID SCHOOL PRODUCTS INC.	1032500003912551	ATH-VAR-B-BSKT	610	GENERAL SUPPLIES	\$365.94
PYRAMID SCHOOL PRODUCTS INC.	1032500003912556	ATH-VAR-B-SCCR	610	GENERAL SUPPLIES	\$119.88
PYRAMID SCHOOL PRODUCTS INC.	1032500003912557	ATH-VAR-B-TENN	610	GENERAL SUPPLIES	\$883.92
PYRAMID SCHOOL PRODUCTS INC.	1032500003912569	ATH-VAR-G-SCCR	610	GENERAL SUPPLIES	\$41.95
PYRAMID SCHOOL PRODUCTS INC.	1032500003912570	ATH-VAR-G-TENN	610	GENERAL SUPPLIES	\$883.92
PYRAMID SCHOOL PRODUCTS INC.	1032500003912572	ATH-VAR-G-VOLY	610	GENERAL SUPPLIES	\$28.95
QUIA CORPORATION	1011100003912130	REG ED-HS-BUSED	658	TECH SUPPLIES	\$495.00
	1000001503912000	REV-COLLC-HS	R6740	FEES COLLECT FROM STUD	\$56.00
READ NATURALLY	1012410003912310	LRN SPT-HS-SPED	658	TECH SUPPLIES	\$690.00
REALLY GOOD STUFF	1011100001907000	REG ED-KR	610	GENERAL SUPPLIES	\$210.63
	1000001033912000	REV-WPA-HS	R6740	FEES COLLECT FROM STUD	\$100.00
RENAISSANCE LEARNING INC.	1011904111907000	FED PRG-TITL1-KR	610	GENERAL SUPPLIES	\$3,503.50
RESONANCE VIOLINS	1011100002910129	REG ED-DMS-ORCHE	432	REPAIR OF EQUIPMENT	\$105.00
RICHEY ATHLETICS	1032500003912000	ATHLETIC-HS	431	BUILDING MAINTENANCE	\$19,190.00
RIO GRANDE	1011100003912122	REG ED-HS-ART	610	GENERAL SUPPLIES	\$686.87
RIVER SPEECH & ED. SERVICES, INC.	1012600002910310	PT OT SRV-DMS-SPED	329	PROF EDUCATIONAL SERVICES	\$1,499.48
RIVER SPEECH & ED. SERVICES, INC.	1012600003912310	PT OT SRV-HS-SPED	329	PROF EDUCATIONAL SERVICES	\$2,661.32
RIVER SPEECH & ED. SERVICES, INC.	1012600001904310	PT OT SRV-OH-SPED	329	PROF EDUCATIONAL SERVICES	\$9,728.30
RIVERSIDE INSIGHTS	1021420001905000	TEST SRV-FV	610	GENERAL SUPPLIES	\$301.02
RIVERSIDE INSIGHTS	1021420001908000	TEST SRV-HW	610	GENERAL SUPPLIES	\$301.00
RIVERSIDE INSIGHTS	1021420001907000	TEST SRV-KR	610	GENERAL SUPPLIES	\$331.50
RIVERSIDE INSIGHTS	1021420001904000	TEST SRV-OH	610	GENERAL SUPPLIES	\$301.02
ROSEN PUBLISHING	1022501073912000	LIBRARY SRV-GNRL-HS	640	BOOKS	\$423.25
ROSEN PUBLISHING	1022503602910000	LIBRARY-SFTY HLTH-DMS	640	BOOKS	\$25.10
RSD STUDENT FINANCIAL ASSOCIATION	1032100003912510	STUD ACT-HS-ACTIV	810	DUES & FEES	\$240.00
RUVNA, INC	1021203601904000	GUIDANCE-SAFE SCHLS-OH	610	GENERAL SUPPLIES	\$5,000.00
RUVNA, INC	1021203602910000	GUIDANCE-SFTY HLTH-DMS	610	GENERAL SUPPLIES	\$5,000.00
RUVNA, INC	1021203601905000	GUIDANCE-SFTY HLTH-FV	610	GENERAL SUPPLIES	\$5,000.00
RUVNA, INC	1021203603912000	GUIDANCE-SFTY HLTH-HS	610	GENERAL SUPPLIES	\$5,000.00
RUVNA, INC	1021203601908000	GUIDANCE-SFTY HLTH-HW	610	GENERAL SUPPLIES	\$5,000.00
RUVNA, INC	1021203601907000	GUIDANCE-SFTY HLTH-KR	610	GENERAL SUPPLIES	\$5,000.00
	1000001503912000	REV-COLLC-HS	R6740	FEES COLLECT FROM STUD	\$95.00
SAM'S CLUB	1025110000000000	BUSINESS	810	DUES & FEES	\$140.00
SAM'S CLUB	1024400000000000	HLTH SRV	610	GENERAL SUPPLIES	\$163.76
SANTUCCI CATERING	1023800003912000	PRINC SRV-HS	635	MEALS/REFRESHMENTS	\$750.00
SAVVAS LEARNING COMPANY LLC	1011100002910190	REG ED-DMS-SOCST	640	BOOKS	\$2,170.00
SAW SALES AND MACHINERY CO. INC.	1011100003912270	REG ED-HS-TECHED	762	CAP REPLACE EQUIP	\$4,222.58
SCANTRON	1011100001908260	REG ED-HW-COMPU	658	TECH SUPPLIES	\$150.00
SCHAEDLER YESCO DISTRIBUTION INC.	1026200002910001	OPER MNT-DMS-MAINT	610	GENERAL SUPPLIES	\$79.90
SCHAEDLER YESCO DISTRIBUTION INC.	1026200001905001	OPER MNT-FV-MAINT	610	GENERAL SUPPLIES	\$123.54
SCHAEDLER YESCO DISTRIBUTION INC.	1026200003912001	OPER MNT-HS-MAINT	610	GENERAL SUPPLIES	\$776.29
SCHLAGER GROUP INC.	1022501073912000	LIBRARY SRV-GNRL-HS	640	BOOKS	\$1,012.95
SCHOOL DATEBOOKS	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$1,439.40
SCHOOL OUTFITTERS	1011100002910129	REG ED-DMS-ORCHE	610	GENERAL SUPPLIES	\$2,102.78
SCHOOL SPECIALTY, LLC	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$83.96
SCIENCE TAKE-OUT	1011100003912180	REG ED-HS-SCIEN	610	GENERAL SUPPLIES	\$159.80
SEAN R BALDIS	1022710000000000	STF DV INST CRT	580	TRAVEL	\$131.93
SEAT SACK, INC.	1011100001907000	REG ED-KR	610	GENERAL SUPPLIES	\$64.75
SHADY SIDE ACADEMY	1032500003912000	ATHLETIC-HS	810	DUES & FEES	\$250.00
SHALER AREA HIGH SCHOOL	1032500002910575	ATH-DMS-WRESTLING	810	DUES & FEES	\$350.00
	1000001503912000	REV-COLLC-HS	R6740	FEES COLLECT FROM STUD	\$56.00
SHARON L LONG	1028360000000000	STF DV-NINST NCRT	580	TRAVEL	\$41.92
SMARTEARTH SHREDDING	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$178.50
	1000001503912000	REV-COLLC-HS	R6740	FEES COLLECT FROM STUD	\$56.00
SOUTHMORELAND WRESTLERS PARENT ASSN	1032500003912575	ATH-VAR-WRESTLING	810	DUES & FEES	\$400.00
SPARK BOOKS, LLC	1022500003912000	LIBR SRVC-HS	640	BOOKS	\$89.94
ST. ANTHONY SCHOOL PROGRAMS	1013900003912290	VOC ED-HS-TVPRD	564	TUITION-VOCATIONAL ED	\$19,000.00
STANDARD CERAMIC SUPPLY COMPANY	1011100002910122	REG ED-DMS-ART	610	GENERAL SUPPLIES	\$193.50
STANDARD CERAMIC SUPPLY COMPANY	1011100003912122	REG ED-HS-ART	610	GENERAL SUPPLIES	\$835.75

STANDARD CERAMIC SUPPLY COMPANY	1011100001908122	REG ED-HW-ART	610	GENERAL SUPPLIES	\$348.00
STANDARD CERAMIC SUPPLY COMPANY	1011100001907122	REG ED-KR-ART	610	GENERAL SUPPLIES	\$430.00
STANDARD CERAMIC SUPPLY COMPANY	1011100001904122	REG ED-OH-ART	610	GENERAL SUPPLIES	\$258.00
STANLEY S STRZEMPEK JR	1022710000000000	STF DV INST CRT	580	TRAVEL	\$128.33
STAT STAFFING MEDICAL SERVICES INC.	1012110001900310	LIFE SKIL-EL-SPED	330	PROFESSIONAL SERVICES	\$8,829.79
STAT STAFFING MEDICAL SERVICES INC.	1012110003900310	LIFE SKIL-SEC-SPED	330	PROFESSIONAL SERVICES	\$18,227.10
STEPHANIE A ABRIATIS	1022710000000000	STF DV INST CRT	580	TRAVEL	\$126.33
STEPHANIE J KURLEJ	1022710000000000	STF DV INST CRT	580	TRAVEL	\$110.83
STEVEN M. EHRIN	1011100001905121	REG ED-FV-MUSIC	432	REPAIR OF EQUIPMENT	\$58.34
STEVEN M. EHRIN	1011100001907123	REG ED-KR-BAND	432	REPAIR OF EQUIPMENT	\$213.72
SUE GOTTLIEB	1032500003912000	ATHLETIC-HS	329	PROF EDUCATIONAL SERVICES	\$800.00
T. F. CAMPBELL COMPANY INC.	1026200003912001	OPER MNT-HS-MAINT	610	GENERAL SUPPLIES	\$925.48
T. F. CAMPBELL COMPANY INC.	1026200001908001	OPER MNT-HW-MAINT	610	GENERAL SUPPLIES	\$213.31
T. F. CAMPBELL COMPANY INC.	1026200001904001	OPER MNT-OH-MAINT	610	GENERAL SUPPLIES	\$676.57
THE WATSON INSTITUTE	1012900003900310	OTHR SPT-SEC-SPED	563	TUITION-NONPUBLIC SCHLS	\$14,606.38
THERESA CIRELLI	1051300000000000	PRIOR YR	880	REFUNDS PRIOR YRS RECPTS	\$59.74
THOMPSON ENAMEL, INC.	1011100003912122	REG ED-HS-ART	610	GENERAL SUPPLIES	\$204.39
TILE RESTORATION, INC.	1046000001905000	CONSTRUC-FV	450	CONSTRUCTION SERVICES	\$12,577.50
TRIB TOTAL MEDIA	1023100000000000	BOARD SRV	549	ADVERTISING	\$1,915.50
U.S. BANK EQUIPMENT FINANCE	1051400000000000	LEASES	913	PRINCIPAL - LEASES	\$53,660.38
UGI ENERGY SERVICES LLC	1026200002910000	OPER MNT-DMS	621	NATURAL GAS	\$387.47
UGI ENERGY SERVICES LLC	1026200001905000	OPER MNT-FV	621	NATURAL GAS	\$42.52
UGI ENERGY SERVICES LLC	1026200003912000	OPER MNT-HS	621	NATURAL GAS	\$1,622.52
UGI ENERGY SERVICES LLC	1026200001908000	OPER MNT-HW	621	NATURAL GAS	\$214.68
UGI ENERGY SERVICES LLC	1026200001907000	OPER MNT-KR	621	NATURAL GAS	\$1,108.17
UGI ENERGY SERVICES LLC	1026200001904000	OPER MNT-OH	621	NATURAL GAS	\$646.59
UNDERWOOD DISTRIBUTING CO.	1011100002910170	REG ED-DMS-MATH	762	CAP REPLACE EQUIP	\$9,585.00
UNIFIRST CORPORATION	1026200002910000	OPER MNT-DMS	431	BUILDING MAINTENANCE	\$51.16
UNIFIRST CORPORATION	1026200001905000	OPER MNT-FV	431	BUILDING MAINTENANCE	\$68.32
UNIFIRST CORPORATION	1026200003912000	OPER MNT-HS	431	BUILDING MAINTENANCE	\$151.26
UNIFIRST CORPORATION	1026200001908000	OPER MNT-HW	431	BUILDING MAINTENANCE	\$53.58
UNIFIRST CORPORATION	1026200001907000	OPER MNT-KR	431	BUILDING MAINTENANCE	\$51.27
UNIFIRST CORPORATION	1026200001904000	OPER MNT-OH	431	BUILDING MAINTENANCE	\$56.44
UNIFIRST CORPORATION	1026200003912000	OPER MNT-HS	415	LAUNDRY SERVICES	\$39.30
UNITED REFRIGERATION INC.	1026200003912001	OPER MNT-HS-MAINT	610	GENERAL SUPPLIES	\$865.29
UNIVERSITY OF OREGON	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$350.00
UNIVERSITY OF PITTSBURGH	1028340000000000	STF DV-N.INST CRT	360	EMPLOYEE TRAINING SERVICE	\$480.00
UNUM LIFE INS COMPANY OF AMERICA	10	GENERAL FUND	0462.001	ADDITIONAL LIFE INS-EE	\$1,244.50
UNUM LIFE INS COMPANY OF AMERICA	10	GENERAL FUND	0462.015	LIFE INSURANCE PAYABLE-ER	\$15,938.12
UNUM LIFE INSURANCE CO. OF AMERICA	10	GENERAL FUND	0462.018	LTD INSURANCE-ER	\$2,680.08
UPMC-ST. MARGARET	1012330001900310	AUTS SPT-EL-SPED	610	GENERAL SUPPLIES	\$200.00
UPMC-ST. MARGARET	1012110003912310	LIFE SKIL-HS-SPED	610	GENERAL SUPPLIES	\$200.00
UPMC-ST. MARGARET	1012410002910310	LRN SPT-DMS-SPED	610	GENERAL SUPPLIES	\$200.00
UPMC-ST. MARGARET	1012900000000310	OTHR SPT-SPED	610	GENERAL SUPPLIES	\$216.00
UPPER ST. CLAIR SCHOOL DISTRICT	1011100003900000	REG ED-SEC	561	TUITION TO OTHER LEA IN P	\$180.00
URBAN PATHWAYS 6-12 CHARTER SCHOOL	1011100002900000	REG ED-MS	562	TUITION-PA CHARTER SCHLS	\$1,694.28
VERIZON	1026200000000000	OPER MNT	538	TELECOMMUNICATIONS	\$720.26
VERIZON BUSINESS SERVICES	1026200000000000	OPER MNT	538	TELECOMMUNICATIONS	\$489.86
VERIZON WIRELESS	1026200000000000	OPER MNT	538	TELECOMMUNICATIONS	\$1,092.00
VEX ROBOTICS INC	1011100003912270	REG ED-HS-TECHED	610	GENERAL SUPPLIES	\$4,918.76
VIRGINIA AIR DISTRIBUTORS, INC.	1026200003912001	OPER MNT-HS-MAINT	610	GENERAL SUPPLIES	\$1,403.34
VISTA HIGHER LEARNING	1011100003912160	REG ED-HS-FORGN	658	TECH SUPPLIES	\$3,757.95
VOLKWEIN BROS.	1011100003912121	REG ED-HS-MUSIC	610	GENERAL SUPPLIES	\$6,756.00
VRABEL PLUMBING COMPANY, LLC	1026200002910000	OPER MNT-DMS	431	BUILDING MAINTENANCE	\$1,500.00
WEST PENN LACO INC.	1026200003912001	OPER MNT-HS-MAINT	610	GENERAL SUPPLIES	\$635.00
WEST PENN LACO INC.	1011100003912122	REG ED-HS-ART	610	GENERAL SUPPLIES	\$27.37
WESTMORELAND COUNTY BLIND ASSOCIATI	1011100002910000	REG ED-DMS	610	GENERAL SUPPLIES	\$45.00
WILLIAM G. GLESNER	1011100003912121	REG ED-HS-MUSIC	432	REPAIR OF EQUIPMENT	\$675.00
WILSON LANGUAGE TRAINING CORP	1011100001900110	REG ED-EL-GNRL	640	BOOKS	\$15,882.48
WILSON LANGUAGE TRAINING CORP	1011101071908000	REG ED-GNRL-HW	610	GENERAL SUPPLIES	\$146.88
WILSON LANGUAGE TRAINING CORP	1011100001900110	REG ED-EL-GNRL	658	TECH SUPPLIES	\$380.00
WORTHINGTON DIRECT	1011100001904110	REG ED-OH-GENRL	752	CAP NEW EQUIP	\$5,487.40
WORTHINGTON DIRECT	1011100001905110	REG ED-FV-GENRL	762	CAP REPLACE EQUIP	\$3,066.90
ZACHARY SKRINJAR	1032500003912000	ATHLETIC-HS	810	DUES & FEES	\$37.00
				Total Check Disbursements	\$2,110,486.13

ACH/Wire Transfers					
1781 CLUB	1032500003912000	ATHLETIC-HS	580	TRAVEL	\$28.84

4IMPRINT	1023600000000000	SUPERINT	610	GENERAL SUPPLIES	\$1,004.54
ACSHIC	10	GENERAL FUND	0462.007	DENTAL INS PAYABLE	\$45,122.85
ACSHIC	10	GENERAL FUND	0462.014	HEALTH INSURANCE	\$987,933.56
ACSHIC	10	GENERAL FUND	0462.032	VISION INS PAYABLE	\$7,257.12
AJS PIZZA	1012900000000310	OTHR SPT-SPED	635	MEALS/REFRESHMENTS	\$295.00
ALDI	1022710000000000	STF DV INST CRT	610	GENERAL SUPPLIES	\$4.00
AMAZON	1011100001907000	REG ED-KR	610	GENERAL SUPPLIES	\$55.96
AMAZON	1011100001904121	REG ED-OH-MUSIC	610	GENERAL SUPPLIES	\$14.99
AMAZON	1011100003912122	REG ED-HS-ART	610	GENERAL SUPPLIES	\$479.36
AMAZON	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$82.08
AMAZON	1011100001907000	REG ED-KR	610	GENERAL SUPPLIES	\$18.04
AMAZON	1011100001907122	REG ED-KR-ART	610	GENERAL SUPPLIES	\$227.48
AMAZON	1011100001907000	REG ED-KR	610	GENERAL SUPPLIES	\$123.35
AMAZON	1011100001804000	REG ED-KG-OH	610	GENERAL SUPPLIES	\$106.76
AMAZON	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$4,383.32
AMAZON	1021200001904000	GUIDANCE-OH	610	GENERAL SUPPLIES	\$26.40
AMAZON	1011100002910150	REG ED-DMS-LANG	610	GENERAL SUPPLIES	\$65.29
AMAZON	1011100002910122	REG ED-DMS-ART	610	GENERAL SUPPLIES	(\$27.99)
AMAZON	1011100001908122	REG ED-HW-ART	610	GENERAL SUPPLIES	\$54.99
AMAZON	1012410001900310	LRN SPT-EL-SPED	610	GENERAL SUPPLIES	\$150.13
AMAZON	1012900000000310	OTHR SPT-SPED	610	GENERAL SUPPLIES	\$48.96
AMAZON	1025400000000000	PRINTING	610	GENERAL SUPPLIES	\$97.60
AMAZON	1011100001908000	REG ED-HW	610	GENERAL SUPPLIES	\$108.57
AMAZON	1011100002910270	REG ED-DMS-TECHED	610	GENERAL SUPPLIES	\$865.21
AMAZON	1022500002910000	LIBR SRV-DMS	610	GENERAL SUPPLIES	\$72.10
AMAZON	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$39.30
AMAZON	1025110000000000	BUSINESS	610	GENERAL SUPPLIES	\$47.38
AMAZON	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$15.95
AMAZON	10	GENERAL FUND	0155.000	OTH RECOVER DISBURSE	\$119.95
AMAZON	1012410001900310	LRN SPT-EL-SPED	610	GENERAL SUPPLIES	\$26.99
AMAZON	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$78.80
AMAZON	1011100002910170	REG ED-DMS-MATH	610	GENERAL SUPPLIES	\$566.40
AMAZON	1011101072910160	REG ED-GNRL-DMS-FOR LANG	610	GENERAL SUPPLIES	\$53.97
AMAZON	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$59.73
AMAZON	1011100001905000	REG ED-FV	610	GENERAL SUPPLIES	\$267.77
AMAZON	1026600001905000	SECURITY-FV	610	GENERAL SUPPLIES	\$114.95
AMAZON	1011100001907000	REG ED-KR	610	GENERAL SUPPLIES	\$46.24
AMAZON	1011100002910000	REG ED-DMS	610	GENERAL SUPPLIES	\$65.99
AMAZON	1011100002910000	REG ED-DMS	610	GENERAL SUPPLIES	\$17.71
AMAZON	1011100001904122	REG ED-OH-ART	610	GENERAL SUPPLIES	\$674.17
AMAZON	1011100002910180	REG ED-DMS-SCIEN	610	GENERAL SUPPLIES	\$271.91
AMAZON	1011100003912122	REG ED-HS-ART	610	GENERAL SUPPLIES	\$574.43
AMAZON	1011100002910190	REG ED-DMS-SOCST	610	GENERAL SUPPLIES	\$42.84
AMAZON	1026600000000000	SECURITY	610	GENERAL SUPPLIES	\$19.79
AMAZON	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$62.66
AMAZON	1023600000000000	SUPERINT	610	GENERAL SUPPLIES	\$24.68
AMAZON	1023600000000000	SUPERINT	658	TECH SUPPLIES	\$219.99
AMAZON	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$59.96
AMAZON	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$91.16
AMAZON	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$91.23
AMAZON	1011100002910000	REG ED-DMS	610	GENERAL SUPPLIES	\$114.99
AMAZON	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$144.69
AMAZON	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$179.99
AMAZON	1022500003912000	LIBR SRVC-HS	640	BOOKS	\$54.47
AMAZON	1011100003912122	REG ED-HS-ART	610	GENERAL SUPPLIES	\$358.86
AMAZON	1011904111907170	FED PRG-TITL1-KR-MATH	610	GENERAL SUPPLIES	\$118.13
AMAZON	1011100002910190	REG ED-DMS-SOCST	610	GENERAL SUPPLIES	\$27.90
AMAZON	1022713901900000	STF DV CRT INST-PASMRT-EL	610	GENERAL SUPPLIES	\$2,714.03
AMAZON	1023800003912000	PRINC SRV-HS	610	GENERAL SUPPLIES	\$230.22
AMAZON	1011103901900180	REG ED-PASMRT-EL-SCIENCE	610	GENERAL SUPPLIES	\$868.79
AMAZON	1021203601904000	GUIDANCE-SAFE SCHLS-OH	610	GENERAL SUPPLIES	\$232.32
AMAZON	1021203601905000	GUIDANCE-SFTY HLTH-FV	610	GENERAL SUPPLIES	\$232.32
AMAZON	1021203601907000	GUIDANCE-SFTY HLTH-KR	610	GENERAL SUPPLIES	\$232.32
AMAZON	1021203601908000	GUIDANCE-SFTY HLTH-HW	610	GENERAL SUPPLIES	\$232.32
AMAZON	1022711410000000	STF DV INST CRT-PTA	610	GENERAL SUPPLIES	\$3,198.03
AMAZON	1022711420000000	STF DV INST CRT-PTA CNSLT	610	GENERAL SUPPLIES	\$72.51
AMAZON	1023601300000000	SUPERINTENDENT-TUGBOAT	610	GENERAL SUPPLIES	\$35.97
AMAZON	1028180000000000	SYS TECH	610	GENERAL SUPPLIES	\$599.00

AMAZON	1011100001804000	REG ED-KG-OH	610	GENERAL SUPPLIES	\$82.41
AMAZON	1032500003912000	ATHLETIC-HS	610	GENERAL SUPPLIES	\$53.99
AMAZON	1011100001907000	REG ED-KR	610	GENERAL SUPPLIES	\$382.39
AMAZON	1026600000000000	SECURITY	610	GENERAL SUPPLIES	\$284.95
AMAZON	1011100001907000	REG ED-KR	610	GENERAL SUPPLIES	\$62.88
AMAZON	1011100001907000	REG ED-KR	610	GENERAL SUPPLIES	\$12.96
AMAZON	1028180000000000	SYS TECH	610	GENERAL SUPPLIES	\$1,228.62
AMAZON	1023800001908000	PRINC SRV-HW	640	BOOKS	\$29.99
AMAZON	1011100003912122	REG ED-HS-ART	610	GENERAL SUPPLIES	\$426.79
AMAZON	1011100001905121	REG ED-FV-MUSIC	610	GENERAL SUPPLIES	\$994.30
AMAZON	1011100001900000	REG ED-EL	610	GENERAL SUPPLIES	\$127.57
AMAZON	1011100001904153	REG ED-OH-ESL	640	BOOKS	\$130.22
AMAZON	1022600003912000	CURR DEV-HS	640	BOOKS	\$347.80
AMAZON	1011100001905000	REG ED-FV	610	GENERAL SUPPLIES	\$121.91
AMAZON	1026600001905000	SECURITY-FV	610	GENERAL SUPPLIES	\$24.74
AMAZON	1011100001907000	REG ED-KR	610	GENERAL SUPPLIES	\$709.40
AMAZON	1021240000000000	INFO SRV	610	GENERAL SUPPLIES	\$2,103.31
AMAZON	1023800003912000	PRINC SRV-HS	610	GENERAL SUPPLIES	\$10.95
AMAZON	1026110003912000	SPV MAINT-HS	610	GENERAL SUPPLIES	\$112.42
AMAZON	1026200003912001	OPER MNT-HS-MAINT	610	GENERAL SUPPLIES	\$353.45
AMAZON	1011100001900000	REG ED-EL	610	GENERAL SUPPLIES	\$33.21
AMAZON	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$374.64
AMAZON	1011100001905000	REG ED-FV	610	GENERAL SUPPLIES	\$308.36
AMAZON	1011100001907000	REG ED-KR	610	GENERAL SUPPLIES	\$394.65
AMAZON	1011100001908000	REG ED-HW	610	GENERAL SUPPLIES	\$56.27
AMAZON	1012330001900310	AUTS SPT-EL-SPED	610	GENERAL SUPPLIES	\$785.48
AMAZON	1012410001900310	LRN SPT-EL-SPED	610	GENERAL SUPPLIES	\$150.17
AMAZON	10129000000000310	OTHR SPT-SPED	610	GENERAL SUPPLIES	\$837.33
AMAZON	1023800003912000	PRINC SRV-HS	610	GENERAL SUPPLIES	\$480.05
AMAZON	1025400000000000	PRINTING	610	GENERAL SUPPLIES	\$61.28
AMAZON	1032500003912000	ATHLETIC-HS	610	GENERAL SUPPLIES	\$107.31
AMAZON	10	GENERAL FUND	0132.051	DUE FROM CAFETERIA FUND 5	\$53.16
AMAZON	1023601300000000	SUPERINTENDENT-TUGBOAT	610	GENERAL SUPPLIES	\$40.80
AMAZON	1025110000000000	BUSINESS	610	GENERAL SUPPLIES	\$41.65
AMER MATH COMP	10	GENERAL FUND	0155.000	OTH RECOVER DISBURSE	\$235.00
AMERICAN FIDELITY	10	GENERAL FUND	0462.050	DEPCAR/FSA PRETX-EE AF	\$22,314.38
AMERICAN FIDELITY	10	GENERAL FUND	0462.052	VOL BEN AFTER TAX - EE AF	\$21,418.68
AMERICAN FIDELITY	10	GENERAL FUND	0462.053	VOL BEN POSTTAX - TX LIFE	\$3,120.89
AMERICAN FIDELITY	10	GENERAL FUND	0462.051	VOL BEN PRETX - EE AF	\$9,109.89
APPLE	1021240000000000	INFO SRV	438	REPAIR OF TECH EQUIP	\$1,509.00
ARBITERPAY	1032500003912000	ATHLETIC-HS	330	PROFESSIONAL SERVICES	\$6,000.00
ARBYS	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$9.41
AZON	1028360000000000	STF DV-N.INST NCRT	360	EMPLOYEE TRAINING SERVICE	\$495.00
B&Z DELI	1023800003912000	PRINC SRV-HS	635	MEALS/REFRESHMENTS	\$147.00
BANG BAR	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$27.09
BEST WESTERN	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$449.40
BLOOKET	1023800003912000	PRINC SRV-HS	658	TECH SUPPLIES	\$1,000.00
BUDGET CAR	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$993.88
BULKAMMO	1026600000000000	SECURITY	610	GENERAL SUPPLIES	\$1,191.07
CAPBARGAIN.COM	10	GENERAL FUND	0155.000	OTH RECOVER DISBURSE	\$340.03
CDW	1021240000000000	INFO SRV	438	REPAIR OF TECH EQUIP	\$816.38
CHICKEN GUY	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$59.55
CHIPOTLE	1028340002910000	STF DV-N.INST CRT-DMS	580	TRAVEL	\$59.05
CHURN	1011100001905000	REG ED-FV	635	MEALS/REFRESHMENTS	\$60.00
CHURN	1032101071905510	STDY ACT-GNRL-FV-ACTIV	635	MEALS/REFRESHMENTS	\$250.00
CITY CAB OF ORLANDO	1028340002910000	STF DV-N.INST CRT-DMS	580	TRAVEL	\$49.34
CONTRAST	1026600000000000	SECURITY	658	TECH SUPPLIES	\$1,590.00
COSTCO	1032101071905510	STDY ACT-GNRL-FV-ACTIV	635	MEALS/REFRESHMENTS	\$97.62
CURBSIDE	1033004111907000	COMM SRV-TITL1-KR	635	MEALS/REFRESHMENTS	\$17.28
DARE	1026600000000000	SECURITY	610	GENERAL SUPPLIES	\$177.00
DIDAX	1022710000000000	STF DV INST CRT	610	GENERAL SUPPLIES	\$554.05
DMARCLY	1021240000000000	INFO SRV	658	TECH SUPPLIES	\$69.00
DUNKIN DONUTS	1023800002910000	PRINC SRV-DMS	635	MEALS/REFRESHMENTS	\$33.95
ED CLUB	1011100003912130	REG ED-HS-BUSED	658	TECH SUPPLIES	\$147.28
EDUC LAW SYMPOSIUM	1028340000000000	STF DV-N.INST CRT	360	EMPLOYEE TRAINING SERVICE	\$139.00
ESERVICE	1026600000000000	SECURITY	810	DUES & FEES	\$20.00
ESERVICE	1032500003912000	ATHLETIC-HS	810	DUES & FEES	\$78.99
EXPERTPAY	10	GENERAL FUND	0462.005	COURT-ORDER DEDUCTS-EE	\$7,317.49

FLOORMARX	1032500003912000	ATHLETIC-HS	610	GENERAL SUPPLIES	\$131.88
FORBES PARKING GARAGE	1026110003912000	SPV MAINT-HS	580	TRAVEL	\$22.00
GIANT EAGLE	1026200003912000	OPER MNT-HS	610	GENERAL SUPPLIES	\$150.00
GIANT EAGLE	1022710000000000	STF DV INST CRT	635	MEALS/REFRESHMENTS	\$455.89
GIANT EAGLE	1023800003912000	PRINC SRV-HS	635	MEALS/REFRESHMENTS	\$174.30
GIANT EAGLE	10	GENERAL FUND	0132.051	DUE FROM CAFETERIA FUND 5	\$414.17
GIANT EAGLE	1023800003912000	PRINC SRV-HS	635	MEALS/REFRESHMENTS	\$811.12
GIANT EAGLE	1023800001904000	PRINC SRV-OH	635	MEALS/REFRESHMENTS	\$46.97
GIANT EAGLE	1023800001907000	PRINC SRV-KR	635	MEALS/REFRESHMENTS	\$53.20
GPSA	1011100001908000	REG ED-HW	610	GENERAL SUPPLIES	\$646.91
GUTTMAN OIL	1026500003912000	VEHIC MNT-HS	626	GASOLINE	\$1,455.61
GUTTMAN OIL	1026500003912550	VEHIC MNT-HS-ATHLETICS	626	GASOLINE	\$220.93
HERSHEYS	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$23.74
HOME DEPOT	1011100001908000	REG ED-HW	610	GENERAL SUPPLIES	\$97.85
HOOTSUITE	1023700000000000	COMM REL	658	TECH SUPPLIES	\$588.00
I KNOW IT	1012110003900310	LIFE SKIL-SEC-SPED	658	TECH SUPPLIES	\$300.00
IDENTISYS	1026600000000000	SECURITY	610	GENERAL SUPPLIES	\$324.86
INTERNAL REVENUE SERVICE	10	GENERAL FUND	0462.011	FEDERAL INCOME TAX (FIT)-	\$427,626.70
INTERNAL REVENUE SERVICE	10	GENERAL FUND	0462.012	FICA PAYABLE-ER	\$487,109.02
INTERNAL REVENUE SERVICE	10	GENERAL FUND	0462.019	MEDICARE PAYABLE-ER	\$114,581.16
INTUIT	1025110000000000	BUSINESS	658	TECH SUPPLIES	\$61.53
INTUIT	1032100002910510	STUD ACT-DMS-ACTIV	658	TECH SUPPLIES	\$32.10
INTUIT	1032100003912510	STUD ACT-HS-ACTIV	658	TECH SUPPLIES	\$29.42
ITALIAN VILLAGE PIZZA	1023800003912000	PRINC SRV-HS	635	MEALS/REFRESHMENTS	\$230.97
ITALIAN VILLAGE PIZZA	1023800003912000	PRINC SRV-HS	635	MEALS/REFRESHMENTS	\$133.00
JOSE CUERVO	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$45.26
KALAHARI	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$616.45
LAKESHORE LEARNING	1011100001905000	REG ED-FV	610	GENERAL SUPPLIES	\$1,058.95
LAPIZZA	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$24.93
LAPIZZA	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$23.84
MATHCON	1012430002910390	GIFTED-DMS-SPPRG	810	DUES & FEES	\$194.65
MGM GRAND	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$23.84
MGM GRAND TAP	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$40.10
MILANO PIZZA	1026600000000000	SECURITY	635	MEALS/REFRESHMENTS	\$0.30
NASRO	1026600000000000	SECURITY	810	DUES & FEES	\$320.00
NAT SCIENCE TEACHERS	1011103901900180	REG ED-PASMRT-EL-SCIENCE	610	GENERAL SUPPLIES	\$30.00
NATL ASSOC PUPIL SRV	1028340000000000	STF DV-N.INST CRT	360	EMPLOYEE TRAINING SERVICE	\$149.00
NATL FED OF HS ASSOC	1032500003312551	ATH-GR9-B-BSKT	610	GENERAL SUPPLIES	\$32.29
NATL FED OF HS ASSOC	1032500003412551	ATH-JV-B-BSKT	610	GENERAL SUPPLIES	\$32.29
NATL FED OF HS ASSOC	1032500003412560	ATH-JV-BASE	610	GENERAL SUPPLIES	\$32.29
NATL FED OF HS ASSOC	1032500003912551	ATH-VAR-B-BSKT	610	GENERAL SUPPLIES	\$32.29
NATL FED OF HS ASSOC	1032500003912560	ATH-VAR-BASE	610	GENERAL SUPPLIES	\$32.29
NATL TEACHERS OF MATH	1023800001905000	PRINC SRV-FV	810	DUES & FEES	\$99.00
NET SALARY	10	GENERAL FUND	0462.021	NET SALARIES-EE	\$2,522,205.81
NINE FINE IRISHMEN PUB	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$43.35
NORTH DISTRICT CREDIT UNION	10	GENERAL FUND	0462.006	CREDIT UNION-EE	\$71,209.27
NOXS TAVERN	1032500003912000	ATHLETIC-HS	580	TRAVEL	\$29.74
OAKMONT BAKERY	10	GENERAL FUND	0132.051	DUE FROM CAFETERIA FUND 5	\$606.50
OFFICE DEPOT	1058000000000000	SUSPENSE ACCOUNTS	610	GENERAL SUPPLIES	\$2,773.74
OLE RED ORLANDO	1028340002910000	STF DV-N.INST CRT-DMS	580	TRAVEL	\$129.45
OMNI FINANCIAL	10	GENERAL FUND	0462.010	EMPLYER TAX SHELTT ANN PAY	\$2,050.00
OMNI FINANCIAL	10	GENERAL FUND	0462.028	TAX SHELTERED ANNUITIES-E	\$101,448.20
OTC	1022711410000000	STF DV INST CRT-PTA	610	GENERAL SUPPLIES	\$448.24
PA DEPT OF REVENUE	10	GENERAL FUND	0462.027	STATE INCOME TAX-EE	\$121,290.58
PA PRINCIPALS ASSOC	1023800001907000	PRINC SRV-KR	810	DUES & FEES	\$620.00
PANERA	1022710000000000	STF DV INST CRT	635	MEALS/REFRESHMENTS	\$1,313.47
PANERA	1023800001907000	PRINC SRV-KR	635	MEALS/REFRESHMENTS	\$163.66
PARTY CITY	1023800001907000	PRINC SRV-KR	610	GENERAL SUPPLIES	\$65.00
PASA	10236000000000103	SUPERINT-ASUPT	810	DUES & FEES	\$2,338.00
PASA	1028340000000000	STF DV-N.INST CRT	360	EMPLOYEE TRAINING SERVICE	\$245.00
PASBO	1026110003912000	SPV MAINT-HS	810	DUES & FEES	\$160.00
PASBO	1025110000000000	BUSINESS	810	DUES & FEES	\$160.00
PASBO	10236000000000103	SUPERINT-ASUPT	810	DUES & FEES	\$160.00
PASBO	1026110003912000	SPV MAINT-HS	810	DUES & FEES	\$160.00
PASBO	1026600000000000	SECURITY	810	DUES & FEES	\$160.00
PASBO	1025110000000000	BUSINESS	810	DUES & FEES	\$160.00
PASBO	1025110000000000	BUSINESS	810	DUES & FEES	\$160.00
PASBO	1027110000000000	SPV TRANS	810	DUES & FEES	\$160.00

PASBO	1026110003912000	SPV MAINT-HS	810	DUES & FEES	\$160.00
PASBO	1025110000000000	BUSINESS	810	DUES & FEES	\$160.00
PASBO	1028360000000000	STF DV-N.INST NCRT	360	EMPLOYEE TRAINING SERVICE	\$220.00
PASBO	1025110000000000	BUSINESS	610	GENERAL SUPPLIES	\$75.00
PAYMENT	1058000000000000	SUSPENSE ACCOUNTS	610	GENERAL SUPPLIES	\$1,584.80
PGH POST GAZETTE	1032500003912000	ATHLETIC-HS	640	BOOKS	\$87.50
PIT PARKING	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$140.00
PIT PARKING	1028340002910000	STF DV-N.INST CRT-DMS	580	TRAVEL	\$80.00
PITTSBURGH POPCORN	1032101071905510	STDT ACT-GNRL-FV-ACTIV	635	MEALS/REFRESHMENTS	\$222.00
PIZZA ROMA	1023800002910000	PRINC SRV-DMS	635	MEALS/REFRESHMENTS	\$43.68
PNC BANK	10	GENERAL FUND	0132.051	DUE FROM CAFETERIA FUND 5	\$75.13
PNC BANK	1025110000000000	BUSINESS	810	DUES & FEES	\$566.93
PSBA	1028360000000000	STF DV-N.INST NCRT	360	EMPLOYEE TRAINING SERVICE	\$42.50
PSERS	10	GENERAL FUND	0462.022	OTHER DEDUCTIONS-EE	\$2,200.00
PSERS	10	GENERAL FUND	0462.024	PSERS PAYABLE-ER	\$4,960,800.80
PSERS	10	GENERAL FUND	0462.025	PSERS-EE	\$246,412.42
PSERS	1011100003912000	REG ED-HS	231	PSERS DEFINED ER	(\$1.25)
PSERS	1011100003912110	REG ED-HS-GENRL	230	RETIREMENT	\$962.53
PSERS	1024400000000000	HLTH SRV	231	PSERS DEFINED ER	\$4,992.73
QUENCH USA	1023800001904000	PRINC SRV-OH	442	RENTALS	\$49.99
RAPTOR TECH	1026600003912000	SECURITY-HS	610	GENERAL SUPPLIES	\$250.00
RENAISSANCE HOTELS	1028340002910000	STF DV-N.INST CRT-DMS	580	TRAVEL	\$1,398.22
SAFE LIFE	1026600000000000	SECURITY	610	GENERAL SUPPLIES	\$777.37
SAMS CLUB	1022710000000000	STF DV INST CRT	635	MEALS/REFRESHMENTS	\$38.86
SAMS CLUB	1023800002910000	PRINC SRV-DMS	635	MEALS/REFRESHMENTS	\$95.38
SEIU	10	GENERAL FUND	0462.009	DUES (PSEA/SEIU/ESPA)-EE	\$2,735.00
SHEETZ	1026500003912550	VEHIC MNT-HS-ATHLETICS	626	GASOLINE	\$85.25
SPOTIFY	1032500003912000	ATHLETIC-HS	658	TECH SUPPLIES	\$13.90
STABUCKS	1028340002910000	STF DV-N.INST CRT-DMS	580	TRAVEL	\$16.08
STAPLES	1021200003912000	GUIDANCE-HS	610	GENERAL SUPPLIES	\$179.99
STEPCRAFT	1022710002910000	STF DV INST CRT-DMS	360	EMPLOYEE TRAINING SERVICE	\$297.00
TARGET	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$214.00
TEQUILERIA	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$47.54
TIMES SQ TO GO	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$25.96
TIMS	1028310000000000	STAFF SERVICES	810	DUES & FEES	\$185.00
TREERING	1011100002910000	REG ED-DMS	610	GENERAL SUPPLIES	\$123.90
TROPICANA	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$651.95
TROPICANA HOTEL	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$651.95
UNUM INSURANCE	10	GENERAL FUND	0462.018	LTD INSURANCE-ER	\$860.53
UPPER CRUST PIZZA	1014200002910000	SUMMER-DMS	635	MEALS/REFRESHMENTS	\$190.83
USPS	1023900000000000	OTH ADMIN	530	COMMUNICATIONS	\$34.90
USPS	1023800003912000	PRINC SRV-HS	610	GENERAL SUPPLIES	\$17.12
VANDERPUMP	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$29.21
VELOCITY MARKETING	1032500003912000	ATHLETIC-HS	610	GENERAL SUPPLIES	\$419.43
VOYA FINANCIAL	10	GENERAL FUND	0462.042	VOYA RETIRE - EE	\$9,133.13
VOYA FINANCIAL	10	GENERAL FUND	0462.041	VOYA RETIRE - ER	\$7,012.32
WALMART	1024400000000000	HLTH SRV	610	GENERAL SUPPLIES	\$93.32
WALMART	1011100003912180	REG ED-HS-SCIEN	610	GENERAL SUPPLIES	\$794.52
WALMART	1023600000000000	SUPERINT	610	GENERAL SUPPLIES	\$11.02
WALMART	1011100002910000	REG ED-DMS	610	GENERAL SUPPLIES	\$106.15
WDW JOCK LINDSEYS	1028340002910000	STF DV-N.INST CRT-DMS	580	TRAVEL	\$130.73
WDW MARKETPLACE	1028340002910000	STF DV-N.INST CRT-DMS	580	TRAVEL	\$19.15
WEBSTaurant	10	GENERAL FUND	0132.051	DUE FROM CAFETERIA FUND 5	\$662.06
WIDGET COMPANY	1011100001904000	REG ED-OH	610	GENERAL SUPPLIES	\$9.00
XFINITY	1028180000000000	SYS TECH	329	PROF EDUCATIONAL SERVICES	\$10.52
YARD HOUSE	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$52.30
YARD HOUSE	1028360000000000	STF DV-N.INST NCRT	580	TRAVEL	\$45.27
ZOOM	1023700000000000	COMM REL	658	TECH SUPPLIES	\$247.97
				Total ACH/Wire Transfers	\$10,266,432.13

Total Disbursements 9.2023 \$12,376,918.26

COVID-19 Mitigation Grant Summary- Disbursements			
Budget Unit Title Includes	Funding Source	Applicable Stimulus/Grant	Total
ESSER III / ARP	990	ESSER III/ARP	\$ 130,953.74
ESSER III / ARP	994	ARP-LEARNING LOSS SET ASIDE	\$ -
ESSER III / ARP	995	ARP-SUMMER PROGRAMS	\$ -

ESSER III / ARP	996 ARP-AFTERSCHOOL	\$	-
September, 2023 Disbursement Report Subtotal		\$	130,953.74

Fox Chapel Area School District

Agenda Study Session

October 2, 2023

Finance Report – August 2023

Fund 10 Financial Report for the Month of:
August, 2023

FISCAL YEAR 2023-2024

REVENUES	ORIGINAL BUDGET	ADJUSTED BUDGET	Budget Change	CURRENT MONTH RECEIPTS*	FISCAL YEAR TO DATE**
Balance Sheet Receipts				\$ 80,580.65	
1000 - Instruction				\$ 24,873.71	
2000 - Support Services				\$ 335.00	
3000 - Non-Instructional				\$ 1.35	
4000 - Facilities				\$ -	
5000 - Other Financing Uses				\$ 3,082.12	
Total Expenditure Contras				\$ 28,292.18	
6000-Local Revenue -	\$ 88,897,430	\$ 88,920,726	\$ 23,295.70	\$ 23,412,418.86	\$ 31,493,778.70
7000-State Revenue -	\$ 22,903,894	\$ 22,965,269	\$ 61,374.65	\$ 2,830,610.70	\$ 2,664,450.19
8000-Federal Revenue -	\$ 1,305,876	\$ 1,305,876	\$ -	\$ 190,159.13	\$ 117,655.39
9000-Other Financing Sources -	\$ 60,000	\$ 70,000	\$ 10,000.00	\$ -	\$ -
Unassigned FB/Reserve	\$ 1,500,000	\$ 1,500,000	\$ -		
TOTAL REVENUES/RECEIPTS	\$ 114,667,200	\$ 114,761,870	\$ 94,670	\$ 26,542,061.52	\$ 34,275,884.28
				\$ -	
EXPENDITURES	ORIGINAL BUDGET	ADJUSTED BUDGET	Budget Change	CURRENT MONTH DISBURSEMENTS*	FISCAL YEAR TO DATE**
Balance Sheet Accounts -				\$ 4,399,196.94	
1000-Instruction -	\$ 69,076,580	\$ 69,100,149	\$ 23,569.29	\$ 472,918.20	\$ 2,943,967.61
2000-Support Services -	\$ 33,256,913	\$ 33,325,868	\$ 68,954.97	\$ 1,001,781.85	\$ 14,698,805.54
3000-NonInstructional Services -	\$ 3,178,849	\$ 3,181,988	\$ 3,139.46	\$ 79,894.34	\$ 729,677.65
4000-Facilities (Buildings/Sites) -	\$ 501,934	\$ 501,934	\$ -	\$ 94,126.09	\$ 80,496.54
5000-Other Financing Uses -	\$ 7,858,943	\$ 7,858,943	\$ -	\$ 2,640,152.47	\$ 6,629,442.08
6000-Local Revenue -				\$ 107.00	
7000-State Revenue -				\$ -	
8000-Federal Revenue -				\$ -	
9000-Other Financing Sources -				\$ -	
Budgetary Reserve	\$ 1,500,000	\$ 1,500,000	\$ -	\$ -	
TOTAL DISBURSEMENTS	\$ 115,373,219	\$ 115,468,883	\$ 95,664	\$ 8,688,176.89	\$ 25,082,389.42
Net Change	-\$ 706,019	-\$ 707,012	-\$ 993	\$ -	as of 9.20.2023
NET INCREASE (DECREASE) TO G/L CASH (Cash Accounts)				\$ 17,853,884.63	

*Current Month Receipts & Disbursements reflect actual money taken in or paid out during the month. They may not necessarily be attributed to the current fiscal year.

** Fiscal Year to Date totals reflect actual allocations for current Fiscal Year, including all adjusting entries. Expenditures include encumbrances.

FISCAL YEAR 2022-2023

REVENUES	ORIGINAL BUDGET	ADJUSTED BUDGET	Budget Change	FISCAL YEAR TO DATE***
6000-Local Revenue -	\$ 83,988,688	\$ 85,654,560	\$ 1,665,872	\$ 87,724,010.77
7000-State Revenue -	\$ 21,989,015	\$ 23,162,040	\$ 1,173,025	\$ 22,464,001.93
8000-Federal Revenue -	\$ 1,753,792	\$ 1,756,245	\$ 2,453	\$ 1,756,247.58
9000-Other Financing Sources -	\$ 70,000	\$ 498,543	\$ 428,543	\$ 490,469.00
Unassigned FB/Reserve	\$ 1,500,000	\$ 1,495,733	-\$ 4,267	
TOTAL REVENUES/RECEIPTS	\$ 109,301,495	\$ 112,567,120	\$ 3,265,625	\$ 112,434,729.28
EXPENDITURES	ORIGINAL BUDGET	ADJUSTED BUDGET	Budget Change	FISCAL YEAR TO DATE***
Balance Sheet Accounts -				
1000-Instruction -	\$ 66,744,842	\$ 67,663,120	\$ 918,278	\$ 66,476,675.19
2000-Support Services -	\$ 32,025,214	\$ 32,674,915	\$ 649,701	\$ 31,691,456.22
3000-NonInstructional Services -	\$ 2,863,272	\$ 2,924,652	\$ 61,380	\$ 2,946,061.53
4000-Facilities (Buildings/Sites) -	\$ 782,585	\$ 809,618	\$ 27,033	\$ 718,372.91
5000-Other Financing Uses -	\$ 7,115,953	\$ 10,920,953	\$ 3,805,000	\$ 10,922,168.63
Budgetary Reserve	\$ 1,500,000	\$ 1,495,733	-\$ 4,267	
TOTAL DISBURSEMENTS	\$ 111,031,866	\$ 116,488,990	\$ 5,457,124	\$ 112,754,734.48
Net Change	-\$ 1,730,371	-\$ 3,921,870	-\$ 2,191,499	as of 9.20.2023

*** Fiscal Year to Date totals reflect actual allocations to date for 2022-23 Fiscal Year, including adjusting entries. These are pre-audit figures and are subject to change.

THESE ARE NOT THE FINAL NUMBERS

Fund 10 Revenue 8/1/2023-8/31/2023

Budget Unit	Account Code	Account Title	Transaction Amount
Balance Sheet Accounts			
10	0462.021	NET SALARIES-EE	\$4,754.24
10	0462.050	DEPCAR/FSA PRETX-EE AF	\$233.33
10	0462.021	NET SALARIES-EE	\$1,946.18
10	0462.021	NET SALARIES-EE	\$15,509.00
10	0462.021	NET SALARIES-EE	\$4,539.98
10	0462.021	NET SALARIES-EE	\$1,282.52
10	0462.021	NET SALARIES-EE	\$782.78
10	0462.021	NET SALARIES-EE	\$13,910.44
10	0462.021	NET SALARIES-EE	\$1,477.42
10	0462.021	NET SALARIES-EE	\$17,980.31
10	0462.021	NET SALARIES-EE	\$18,164.45
Subtotal			\$80,580.65
Current Real Estate Tax			
1000000110000000	R6111	CURRENT REAL ESTATE TAXES	\$862,915.96
1000000120000000	R6111	CURRENT REAL ESTATE TAXES	\$219,829.81
1000000130000000	R6111	CURRENT REAL ESTATE TAXES	\$5,415,733.36
1000000140000000	R6111	CURRENT REAL ESTATE TAXES	\$1,072,401.14
1000000150000000	R6111	CURRENT REAL ESTATE TAXES	\$13,439,380.17
1000000160000000	R6111	CURRENT REAL ESTATE TAXES	\$491,260.05
Subtotal			\$21,501,520.49
Act 511 Taxes			
1000000000000000	R6143	LOCAL SERVICES TAX (LST)	\$7,297.46
1000000150000000	R6143	LOCAL SERVICES TAX (LST)	\$11,174.43
1000000000000000	R6151	EARNED INCOME TAX (EIT)	\$991,130.39
1000000000000000	R6153	REAL ESTATE TRANSFER TAX	\$150,380.50
Subtotal			\$1,159,982.78
Current Real Estate TDelinquent Taxesax			
1000000000000000	R6411	DELINQ REAL ESTATE TAXES	\$111,514.84
1000000000000000	R6411	DELINQ REAL ESTATE TAXES	\$14,455.00
Subtotal			\$125,969.84
Other Local Revenues			
1000000000000000	R6510	EARNINGS ON INVESTMENTS	\$127,305.75
1000000000000000	R6710	ADMISSIONS	\$1,179.00
1000000000000000	R6710	ADMISSIONS	\$53.00
1000000000000000	R6710	ADMISSIONS	\$230.00
1000000000000000	R6710	ADMISSIONS	\$91.00
1000000000000000	R6710	ADMISSIONS	\$490.00
1000000000000000	R6710	ADMISSIONS	\$280.00
1000000000000000	R6710	ADMISSIONS	\$150.00
1000000000000000	R6740	FEES COLLECT FROM STUD	\$25.00
1000000000000000	R6740	FEES COLLECT FROM STUD	\$30.00
1000000000000000	R6740	FEES COLLECT FROM STUD	\$10.00
1000000000000000	R6740	FEES COLLECT FROM STUD	\$10.00
1000000000000000	R6740	FEES COLLECT FROM STUD	\$10.00
1000000000000000	R6740	FEES COLLECT FROM STUD	\$550.00

Fund 10 Revenue 8/1/2023-8/31/2023

Budget Unit	Account Code	Account Title	Transaction Amount
1000000000000000	R6740	FEES COLLECT FROM STUD	\$750.00
1000000000000000	R6740	FEES COLLECT FROM STUD	\$50.00
1000000000000000	R6740	FEES COLLECT FROM STUD	\$350.00
1000000000000000	R6740	FEES COLLECT FROM STUD	(\$50.00)
1000000000000260	R6740	FEES COLLECT FROM STUD	\$75.00
1000000000000260	R6740	FEES COLLECT FROM STUD	\$60.00
1000000000000260	R6740	FEES COLLECT FROM STUD	\$60.00
1000000000000260	R6740	FEES COLLECT FROM STUD	\$30.00
1000001033912000	R6740	FEES COLLECT FROM STUD	\$200.00
1000000000000000	R6821	STATE REV FROM PA LEAS	\$390.58
1000005200000000	R6832	FED IDEA PASS THRU FUNDS	\$479,508.26
1000000003912550	R6910	RENTAL INCOME	\$225.00
1000000003912550	R6910	RENTAL INCOME	\$437.50
1000001523912550	R6910	RENTAL INCOME	\$437.50
1000001071905000	R6920	DONATIONS	\$2,989.00
1000000000000000	R6999	MISC REVENUE	\$33.74
1000000000000000	R6999	MISC REVENUE	\$8,853.85
1000000000000000	R6999	MISC REVENUE	\$44.00
1000000000000000	R6999	MISC REVENUE	\$15.00
1000000000000000	R6999	MISC REVENUE	\$14.00
1000000003912550	R6999	MISC REVENUE	\$40.00
1000001523912550	R6999	MISC REVENUE	\$18.57
Subtotal			\$624,945.75
Basic Instructional & Operating Subsidy			
1000000000000000	R7111	BASIC ED FORMULA	\$752,063.00
1000000000000000	R7112	BASIC ED - SSR PAYMENTS	\$504,451.53
Subtotal			\$1,256,514.53
Special Education Subsidy			
1000000000000000	R7271	SPECIAL EDUCATION SUBSIDY	\$385,835.00
Subtotal			\$385,835.00
Other State Revenues			
1000000000000000	R7311	PUPIL TRANSPORT SUBSIDY	\$101,371.00
1000000000000000	R7311	PUPIL TRANSPORT SUBSIDY	\$10,662.73
1000000000000000	R7340	STATE PROPERTY TAX REDUC	\$925,246.00
1000003600000000	R7362	PA MNTL HLTH & SFTY GRANT	\$115,267.16
1000003900000000	R7506	PASMART GRANT	\$35,714.28
Subtotal			\$1,188,261.17
Federal Revenues			
1000004110000000	R8514	TITLE I FUNDING	\$60,543.60
1000004210000000	R8515	TITLE II FUNDING	\$11,960.14
1000009900000000	R8744	ESSER III ARP FUNDS	\$113,931.96
1000008910000000	R8820	MEDICAID REIMB (CLAIMS)	\$2,522.75
1000008910000000	R8820	MEDICAID REIMB (CLAIMS)	\$1,200.68
Subtotal			\$190,159.13
Instructional Expenditures			
1011100003912000	281	OPEB HEALTH	\$5,053.47

Fund 10 Revenue 8/1/2023-8/31/2023

Budget Unit	Account Code	Account Title	Transaction Amount
1011100003912000	281	OPEB HEALTH	\$523.96
1011100003912000	281	OPEB HEALTH	\$427.21
1011100003912000	281	OPEB HEALTH	\$449.32
1011100003912000	281	OPEB HEALTH	\$686.29
1011100003912000	281	OPEB HEALTH	\$427.21
1011100003912000	281	OPEB HEALTH	\$17,306.25
Subtotal			\$24,873.71
Support Service Expenditures			
1026200000000000	523	GEN LIABILITY INSURANCE	\$323.00
1028360000000000	580	TRAVEL	\$12.00
Subtotal			\$335.00
Non-Instructional Expenditures			
1032100003912510	580	TRAVEL	\$1.35
Subtotal			\$1.35
Other Expenditures			
1058000000000000	891	MISC EXPENDITURES	\$3,082.12
Subtotal			\$3,082.12
Total Revenues 8.2023			\$26,542,061.52

Fox Chapel Area School District

Agenda Study Session

October 2, 2023

Budget Transfers

Budget Transfers for Approval 10/9/2023

Budget Code to Transfer FROM		Budget Code to Transfer TO		Budget Transfer Reason	Transfer Amount
Internal Transfers (transfers within same function and sub-object)					
1011100001904110 752	REG ED-OH-GNRL (Capital New Equipment)	1011100001904140 752	REG ED-OH-PHYSED (Capital New Equipment)	To cover added cost of budgeted item	\$237.04
1011100002910270 610	REG ED-DMS-TECHED (General Supplies)	1011100002910270 658	REG ED-DMS-TECHED (Tech Supplies)	To cover added cost of software	\$700.00
1011100002910150 658	REG ED-DMS-LANG (Tech Supplies)	1011100002910150 640	REG ED-DMS-LANG (Books)	To cover added cost due to increased need	\$461.00
1011100001904121 610	REG ED-OH-MUSIC (General Supplies)	1011100001904121 658	REG ED-OH-MUSIC (Tech Supplies)	To cover added cost of software	\$175.00
1011100003912170 640	REG ED-HS-MATH (Books)	1011100003912170 610	REG ED-HS-MATH (General Supplies)	To cover added cost of supplies	\$6,000.00
1011100002910150 658	REG ED-DMS-LANG (Tech Supplies)	1011100002910150 640	REG ED-DMS-LANG (Books)	To cover added cost due to increased need	\$575.00
External Transfers (transfers between functions and/or objects)					
					\$8,148.04

Fox Chapel Area School District

Agenda Study Session

October 2, 2023

PowerSchool Group LLC Agreement – eFinancePlus Software



Remit Email: michelle.mullins@powerschool.com
 Quote Date: 13-SEP-2023
 Quote #: Q-838109-1

Sales Quote - This is Not An Invoice

Prepared By: Michelle Mullins
 Customer Name: Fox Chapel Area School District
 Contract Term: 12 Months
 Start Date: 1-JAN-2024
 End Date: 31-DEC-2024
 Billing Frequency: Annually

Customer Contact: Megan Collett
 Title: Director of Instructional Technology
 Address: 611 Field Club Rd
 City: Pittsburgh
 State/Province: Pennsylvania
 Zip Code: 44875
 Phone #: (412) 967-2418

Product Description	Quantity	Unit	Unit Price	Extended Price
Initial Term 1-JAN-2024 - 31-DEC-2024				
License and Subscription Fees				
eFinancePlus Dedicated Environment Hosting	1.00	Students		USD 19,323.76
eFinancePlus Financial Acctg Base SaaS	1.00	Students		USD 59,151.25
eFinancePlus Employee Benefits SaaS	1.00	Students		USD 3,156.78

License and Subscription Totals: **USD 81,631.79**

Quote Total

Initial Term	1-JAN-2024 - 31-DEC-2024
Amount To Be Invoiced	USD 81,631.79

Fees charged in subsequent periods after the duration of this quote will be subject to an annual uplift. On-Going PowerSchool Subscription/Maintenance and Support Fees are invoiced at the then current rates and enrollment per existing terms of the executed agreement between the parties. Any applicable state sales tax has not been added to this quote. Subscription Start and expiration Dates shall be as set forth above, which may be delayed based upon the date that PowerSchool receives your purchase order. If this quote includes promotional pricing, such promotional pricing may not be valid for the entire duration of this quote.

All invoices shall be paid before or on the due date set forth on invoice. All purchase orders must contain the exact quote number stated within. Customer agrees that purchase orders are for administrative purposes only and do not impact the terms or conditions reflected in this quote and the applicable agreement. Any credit provided by PowerSchool is nonrefundable and must be used within 12 months of issuance. Unused credits will be expired after 12 months.

This renewal quote will continue to be subject to and incorporate the terms and conditions of the main services agreement executed between PowerSchool and Customer that is in effect at the time of this quote, or if no such agreement is in effect, then the terms and conditions found at https://www.powerschool.com/MSA_Feb2022/, as may be amended.

THE PARTIES BELOW ACKNOWLEDGE THAT THEY HAVE READ THE AGREEMENT, UNDERSTAND IT AND AGREE TO BE BOUND BY ITS TERMS.

POWERSCHOOL GROUP LLC

Fox Chapel Area School District

Signature:

Signature:

A handwritten signature in black ink, appearing to read "Eric Shander". The signature is fluid and cursive, with the first name "Eric" and last name "Shander" clearly distinguishable.

Printed Name: Eric Shander

Printed Name: Marybeth Dadd

Title: Chief Financial Officer

Title: School Board President

Date: 13-SEP-2023

Date: October 9, 2023

PO Number: _____

Fox Chapel Area School District

Agenda Study Session

October 2, 2023

403(b) Adoption Agreement

403(b) Adoption Agreement

Fox Chapel Area School District

**Non-ERISA VOLUME SUBMITTER 403(b) PLAN DOCUMENT
FOR PUBLIC SCHOOLS, ADOPTION AGREEMENT #04002**

The undersigned Employer hereby adopts a section 403(b) plan in the form a Volume Submitter 403(b) plan attached hereto, and agrees that the following terms, definitions, and elections shall be part of such 403(b) Plan. Where applicable, certain Items have a Default Provision indicated below the Item number that will apply if no election is made by the Employer.

EMPLOYER INFORMATION

1. Employer Name: <u>Fox Chapel Area School District</u>			
Address: <u>611 Field Club Rd.</u>			
City: <u>Pittsburgh</u>	State: <u>PA</u>	Zip Code: <u>15238</u>	Phone: <u>412-963-9600</u>
2. Contact Person: <u>Kimberly Pawlishak</u>		Phone: <u>412-967-2412</u>	Email: <u>Kimberly_pawlishak@fcasd.edu</u>
3. Employer Identification Number: <u>25-6010615</u>			
4. The Administrator shall be (entity that administers the Plan):			
☐ (a)	The Employer	☐ (b)	The Employer Jointly with the Vendors
☒ (c)	A designated Administrator (specify): <u>U.S OMNI & TSACG Compliance Services</u>		

PLAN INFORMATION

5. Sponsor of the 403(b) Volume Submitter Plan: <u>U.S. OMNI & TSACG Compliance Services</u>			
Address: <u>220 Alexander St., Ste. 400, Rochester NY 14607</u>			
Phone: <u>877-544-6664</u>		E-mail: <u>plansupport@omni403b.com</u>	
6. (a) Name of Plan: <u>Fox Chapel Area School District 403(b) Plan</u> (b) This Plan is a Multiple Employer Plan ☐ Yes; ☒ No. If Yes, name of Plan Sponsor: _____			
7. (a) Plan Year: ☒ (1) The calendar year; ☐ (2) The 12-consecutive month period beginning on _____; or ☐ (3) An initial short Plan Year beginning on _____ and ending on _____ and thereafter the 12-consecutive month period beginning on _____ and ending on _____ ☐ (4) A short Plan Year beginning on _____ and ending on _____ (b) Limitation Year: ☐ (1) The Plan Year ☒ (2) The calendar year ☐ (3) The 12-consecutive month period beginning on _____ ☐ (4) An initial short Plan Year beginning on _____ and ending on _____ and thereafter the 12-consecutive month period beginning on _____ and ending on _____ ☐ (5) A short Plan Year beginning on _____ and ending on _____			
8. Effective Date: The Employer has completed and signed this Adoption Agreement in order to:			
		Initial Effective Date	Amendment/Restatement Effective Date
☐ (a)	Establish a new 403(b) plan (not earlier than the 1 st day of current Plan Year)		N/A
☐ (b)	Restate a 403(b) plan previously adopted by the Employer (restatement date cannot be earlier than 1-01-2009, but not later than 1-01-2010 unless the initial effective date is after 1-01-2010)	_____	_____
☒ (c)	Amend a 403(b) plan previously adopted by the Employer (Amendments made, if applicable: <u>permit Roth contributions</u>)	<u>01/01/2009</u>	<u>08/29/2023</u>
9. The Plan shall accept the following contribution types (check all that apply and complete the corresponding section(s) of the Adoption Agreement, if applicable):			
☒ (a)	Pre-Tax Elective Deferrals	☐ (j)	Rollovers
☒ (b)	Post-Tax Roth Elective Deferrals	☒ (k)	Plan-to-Plan Transfers
☒ (c)	Age 50 Catch-up Contributions	☒ (l)	Exchanges (as outlined in the Administrative Appendix)

☒ (d)	Special Catch-up after 15 years of service	☒ (m)	PTO – Sick Leave		
☐ (e)	Nondeductible Employee (After-Tax) Contributions	☐ (n)	PTO – Vacation		
☐ (f)	Mandatory Employee Contribution	☐ (o)	Social Security Replacement		
☒ (g)	Employer Nonelective Contributions pursuant to the Collective Bargaining Agreement and/or the employment contract	☐ (p)	ORP Contributions subject to Article XII of the Plan		
☐ (h)	Employer Matching Contributions pursuant to the Collective Bargaining Agreement and/or the employment contract	☐ (q)	Supplemental 403(b) Contributions (subject to Article XII of the Plan)		
☒ (i)	Post-Employment Employer Contributions	☐ (r)	Deemed IRA		

10. In computing a Participant's Compensation (as defined under Section 2.14 of the Plan, the following shall be excluded:

		All Contributions	Elective Deferrals	Mandatory Contributions	Employer Contributions
☒ (a)	No exclusions. All compensation will be included.	☒	☐	☐	☐
☐ (b)	Overtime	☐	☐	☐	☐
☐ (c)	Bonuses	☐	☐	☐	☐
☐ (d)	Other (describe another exclusion, for example, stipends):	☐	☐	☐	☐

11. (a) Compensation shall be determined over the following Determination period: ☐ (1) the Plan Year; or ☒ (2) a consecutive 12-month period ending with or within the Plan Year. Enter the day and the month this period begins: 01 (day) 01 (month). For Employees whose date of hire is less than 12 months before the end of the 12-month period designated, compensation will be determined over the Plan Year.

(b) For purposes of allocating Employer Contributions, Compensation ☐ (1) shall ☒ (2) shall not include amounts paid prior to a Participant's Entry Date.

12. Allocation Periods for Contributions (This will determine if additional contributions need to be made for a given year:

		All Contributions	Matching	Nonelective
☐ (a)	Weekly	☐	☐	☐
☐ (b)	Bi-Weekly	☐	☐	☐
☐ (c)	Quarterly	☐	☐	☐
☐ (d)	Annual	☐	☐	☐
☒ (e)	Per Pay	☒	☐	☐
☐ (f)	Other (specify): _____	☐	☐	☐

ELIGIBILITY AND PARTICIPATION – ELECTIVE DEFERRALS

13. The following Employees shall be eligible under the Plan to make Elective Deferrals (Check (a) or (b)):

☐ (a) All Employees of the Employer.

☒ (b) All Employees of the Employer except the following category(ies):

☐ (1) Nonresident aliens described in section 410(b)(3)(C) of the Code, who receive no earned income from the Employer which constitutes income from sources within the U.S.

☐ (2) Employees who normally work less than 20 hours per week. An Employee normally works fewer than 20 hours per week if, for the 12-month period beginning on the date the Employee's employment commenced, the Employer reasonably expects the Employee to work fewer than 1,000 hours of service (as defined under section 410(a)(3)(C) of the Internal Revenue Code) in such period, and, for each Plan Year ending after the close of that 12-month period, the Employee has worked fewer than 1,000 hours of service in the preceding 12- month period. Under this provision, an Employee who works 1,000 or more hours of service in the 12-month period beginning on the date the Employee's employment commenced or in a Plan Year ending after the close of that 12- month period shall then be eligible to participate in the

☐ (3)	Plan. Once an Employee becomes eligible to have Elective Deferrals made on his or her behalf under the Plan under this standard, the Employee cannot be excluded from eligibility to have Elective Deferrals made on his or her behalf in any later year under this standard.
☒ (4)	Employees who are students performing services described in section 3121(b)(10) of the Code.
(c) If 13(b)(2) is elected above, then the following rule will apply for subsequent years in determining whether the Employee is eligible for the Plan. The initial computation period shall begin on the date of hire and end on the anniversary thereof. Subsequent eligibility computation periods shall commence with: ☐ (1) the anniversary of the Employee's employment commencement date; or ☐ (2) the Plan Year which commences prior to the Employee's first anniversary of his employment commencement date. (d) ☐ (1) The Employer elects to reduce the required Hours of Service per year in 13(b)(2) to _____ (not to exceed 1000) Hours; or ☐ (2) N/A.	
14. The Entry Date of a Participant with respect to Elective Deferrals shall be: ☐ (a) On the first day of the month following date of employment; ☐ (b) After the completion of _____ days (may be 30 or 60 days, if Employee receives information on the Plan within the first 30 days of employment) ☒ (c) Entry Date shall mean the Employee's employment commencement date and deferrals elections shall be effective in the next pay period. ☐ (d) Other (Specify. May not exceed 60 days from satisfaction of eligibility requirements): _____	
15. Employees are permitted to make Pre-Tax Elective Deferrals to the Plan as follows: ☒ (a) Elective Deferrals of up to the maximum amount permitted under sections 403(b) and 415 of the Code are permitted. ☐ (b) Elective Deferrals of up to _____ % (not to exceed 100%) of a Participant's Compensation are permitted.	
16. If Roth 403(b) Elective Deferrals are permitted under the Plan then Excess Deferrals will first be corrected from the: ☒ (a) regular Pre-tax Elective Deferral Account; or ☐ (b) Roth Elective Account ☐ (c) N/A.	
AUTOMATIC ENROLLMENT	
In consideration of the following provisions, an Employer should determine whether automatic enrollment is permitted under the applicable State law prior to adopting this provision.	
17. The Eligible Automatic Contribution Arrangement (EACA) provisions of Article 3.03 of the Plan: ☒ (a) shall not apply ☐ (b) shall apply and the Default Percentage indicated below shall be automatically withheld and contributed to the Plan as a Pre-Tax Elective Deferral.	
18. (a) Covered Employee for Purposes of Eligible Automatic Contribution Arrangement (EACA): Employees covered under the EACA are (Check one of the options below.): ☐ (1) All Participants ☐ (2) All Participants who do not have an affirmative election in effect regarding Elective Deferrals ☐ (3) All Participants who become Participants on or after the effective date of the EACA and who do not have an affirmative election in effect regarding Elective Deferrals (b) Default Percentage (Check one of the options below and insert a percentage or percentages and, if applicable, a date.):	

- ☐ (1) The Default Percentage is ____% (a uniform percentage of each Covered Employee's Compensation for the applicable pay period)
- ☐ (2) The initial Default Percentage is ____% (a uniform percentage of each Covered Employee's Compensation for the applicable pay period) and will increase by one percentage point as described in Section 3.03 of Article III of the Plan until the Default Percentage is ____%. (Insert the highest default percentage that will apply) Each increase will be effective with the first pay period of the Plan Year or the first pay period after the date inserted here: ____.

ROLLOVER/TRANSFER AND OTHER EMPLOYEE CONTRIBUTION PROVISIONS

19. (a) Direct Rollovers: The Plan will accept a Direct Rollover of an Eligible Rollover Distribution from (check each that applies or N/A):

- ☐ (1) N/A. The Plan will not accept Direct Rollovers from any plan.
- ☒ (2) a qualified plan described in section 401(a) or 403(a) of the Code, excluding After-Tax employee contributions.
- ☐ (3) an annuity contract described in section 403(b) of the Code, including After-Tax employee contributions.
- ☒ (4) an annuity contract described in section 403(b) of the Code, excluding After-Tax employee contributions.
- ☒ (5) an eligible plan under section 457(b) of the Code which is maintained by a state, political subdivision of a state, or any agency or instrumentality of a state or political subdivision of a state.

(b) The Plan ☒ (1) will ☐ (2) will not accept Designated Roth accounts from any of the plans selected in 19(a)

20. Participant Rollover Contributions

(a) Participant Rollover Contributions from Other Employer Plans: The Plan will accept a Participant contribution of an Eligible Rollover Distribution from (check each that applies or N/A):

- ☐ (1) N/A. The Plan will not accept Rollover Contributions from any employer plan.
- ☒ (2) a qualified plan described in section 401(a) or 403(a) of the Code, excluding after-tax employee contributions.
- ☒ (3) an annuity contract described in section 403(b) of the Code, excluding after-tax employee contributions.
- ☒ (4) an eligible plan under section 457(b) of the Code which is maintained by a state, political subdivision of a state, or any agency or instrumentality of a state or political subdivision of a state.

(b) The Plan ☒ (1) will ☐ (2) will not accept Designated Roth accounts from any of the plans selected in 20(a)

(c) Participant Rollover Contributions from IRAs: The Plan (choose one):

(1) ☒ will (2) ☐ will not accept a Participant Rollover Contribution of the portion of a distribution from an individual retirement account or annuity described in section 408(a) or 408(b) of the Code that is eligible to be rolled over and would otherwise be includible in gross income.

21. In-Plan Roth Rollovers:

(a) The Plan ☒ (1) will ☐ (2) will not permit In-Plan Roth Rollovers of distributable amounts.

(b) The Plan ☒ (1) will ☐ (2) will not permit In-Plan Roth Rollovers of otherwise non-distributable amounts.

22. Deemed IRA Contributions. A Participant may make Deemed IRA contributions to the following type(s) of IRA Accounts established in accordance with Article XIII of the Plan:

☐ (a) Traditional
☐ (b) Roth
☐ (c) Either (a) or (b) above as designated by the Participant at the time the contribution is made

23. Mandatory Employee Contributions shall be required to be made by the following Employees:

☐ (a) _____% of each eligible Employee's Compensation if such Employee was hired after: _____; and if applicable
☐ (b) _____% of each eligible Employee's Compensation if such Employee was hired after _____, and was a participant in _____ (e.g. state retirement plan) but after receiving a choice has elected to participate in this Plan.

DISTRIBUTION PROVISIONS

24. Pursuant to the underlying Individual Agreements, the following transactions are permitted:

(a) Select all that apply and specify the corresponding sources from which the withdrawal can be made:

		All Contributions	Elective Deferrals	Mandatory Contributions	Employer Contributions
☒ (1)	Financial Hardship Distributions	☒	☐	☐	☐
☒ (2)	Loans	☒	☐	☐	☐
☒ (3)	Distributions at age 59 ½	☒	☐	☐	☐

(b) The following transactions are permitted:

☒ (1) Plan-to-Plan transfers to another Employer Plan
☒ (2) Transfers to a State Retirement Plan to purchase service credits
☒ (3) Distribution of Rollover Contributions at any time

(c) The following distributions are permitted from Employer Contributions under Annuity Contracts only:

☒ (1) Attained Age of 59 1/2
☐ (2) After _____ Years of Service

25. If permitted by the underlying Individual Agreements, the Plan (a) ☐ will, (b) ☒ will not permit the distribution of Small Account Balances from the Plan.

EMPLOYER CONTRIBUTIONS

26. Employer Contributions

☐ (a) Employer Contributions shall not be made.

☒ (b) Employer Contributions shall be made as follows (check all types that apply):

☒ (1) Employer Contributions shall be made in accordance with any applicable collective bargaining agreements or employment contracts as shall be determined from time to time by the Employer.

☐ (2) Discretionary Contribution Formula: Nonelective Employer contributions will be allocated to each Participant in the ratio that such Participant's Compensation bears to the compensation of all Participants to whom Nonelective Employer contributions are allocated determined annually by the Employer.

☐ (3) Definite Contribution Formula: For each Plan Year, the Employer will contribute for each eligible Participant an amount equal to _____% or \$_____ of such Participant's Compensation.

☒ (4) Employer Post-Employment Contributions shall be made.

☐ (5) Employer Matching Contributions shall be made under the following formula:

☐ (A) _____ percent of the Participant's Elective Deferrals
☐ (B) _____ percent of the Participant's Employee Contributions
☐ (C) The Employer shall not match amounts provided in excess of \$_____, or in excess of _____ percent, of the Participant's Compensation
☐ (D) An amount, if any, determined by the Employer

☐ (6) ORP Contributions under the State of _____ made pursuant to the applicable laws of the ORP.

☐ (7) Employees hired after _____ where such Employees are making a Mandatory Employee Contribution of _____%, shall receive an Employer Nonelective Contribution of _____% of Compensation.			
ELIGIBILITY AND PARTICIPATION – EMPLOYER CONTRIBUTIONS			
27. All Employees of the Employer (including employers required to be aggregated under sections 414(b), (c), (m), or (o) of the Code) will be eligible to participate in this Plan except the following:			
		Nonelective	Matching
☒ (a)	N/A. There is no age or service requirement.	☒	☐
☐ (b)	Employees who have not attained age _____ (cannot exceed age 21)	☐	☐
☐ (c)	Employees who have not completed _____ Year(s) of Service; or _____ Month(s) of Service; or _____ Day(s) of Service. (Cannot exceed 1 year unless the Plan provides a nonforfeitable right to 100% of the Participant's account balance derived from Employer contributions after not more than 2 years of service in which case up to 2 years is permissible. If the Year(s) of Service selected is or includes a fractional year, an employee will not be required to complete any specified number of Hours of Service to receive credit for such fractional year.)	☐	☐
28. All Employees who are members of eligible classes of employees shall be eligible to participate in the Plan except:			
		Nonelective	Matching
☒ (a)	N/A. There are no exclusions	☒	☐
☐ (b)	Nonresident Aliens (see Section 2.28 of the Plan)	☐	☐
☐ (c)	Employees who become Employees as the result of a "section 410(b)(6)(C) transaction"	☐	☐
☐ (d)	Employees of the following employer(s) aggregated with the Employer under section 414(b), (c), (m), or (o) of the Code: _____	☐	☐
☐ (e)	Hourly Rated Employees	☐	☐
☐ (f)	Other (specify): _____ (Note: Insert an exclusion category, e.g. Division A Employees.)	☐	☐
☐ (g)	Nonresident Aliens (see Section 2.28 of the Plan)	☐	☐
29. (a) Eligibility under the Plan will be extended to all Employees who satisfied the eligibility requirements of this Plan with the following prior unrelated employer(s): ☐ (1) _____; ☒ (2) N/A (b) The eligibility and service requirements in Item #27 above ☐ (1) are ☐ (2) are not waived with respect to Employees employed on the Effective Date of this Plan. If these requirements are waived, such Employees shall become Participants in the Plan as of the Effective Date of the Plan.			
30. Service for eligibility and vesting will be determined on the basis of the method selected below. Only one method may be selected and such method will be applied to all Employees covered under the Plan.			
☒ (a)	On the basis of actual hours for which an Employee is paid or entitled to payment		
☐ (b)	On the basis of days worked. An Employee will be credited with ten (10) hours of service if under Section 2.25 of the Plan such Employee would be credited with at least one (1) Hour of Service during the day		
☐ (c)	On the basis of weeks worked. An Employee will be credited with forty-five (45) Hours of Service if under Section 2.25 of the Plan such Employee would be credited with at least one (1) Hour of Service during the week		
☐ (d)	On the basis of semi-monthly payroll periods. An Employee will be credited with ninety-five (95) Hours of Service if under Section 2.25 of the Plan such Employee would be credited with at least one (1) Hour of Service during the semi-monthly payroll period		
☐ (e)	On the basis of months worked. An Employee will be credited with one hundred ninety (190) Hours of Service if under Section 2.25 of the Plan such Employee would be credited with at least one (1) Hour of Service during the month		
☐ (f)	On the basis of Elapsed Time, as provided for in Section 2.43(b)(2) of the Plan		

31. (a) Subsequent Eligibility Computation Periods shall commence with: ☒ (1) the anniversary of the Employee's employment commencement date; or ☐ (2) the Plan Year which commences prior to the Employee's first anniversary of his employment commencement date. (b) Subsequent Vesting Computation Periods shall commence with: ☐ (1) the anniversary of the Employee's employment commencement date; or ☐ (2) the Plan Year which commences prior to the Employee's first anniversary of his employment commencement date.																			
32. An Employee who has completed the eligibility requirements shall enter the Plan on the following Entry Date:																			
		Nonelective	Matching																
☐ (a)	There are no age and service requirements. Entry Date shall mean the Employee's employment commencement date.	☐	☐																
☒ (b)	The day on which the Employee satisfies the eligibility requirements	☒	☐																
☐ (c)	The first day of the Plan Year in which the Employee satisfies the eligibility requirements	☐	☐																
☐ (d)	The first day of the first month or the first day of the 7th month of the Plan Year coinciding with or next following the satisfaction of the Plan's eligibility requirements	☐	☐																
☐ (e)	The first day of the month in which the Participant satisfies the eligibility requirements	☐	☐																
☐ (f)	The first day of the following months after the Employee satisfies the eligibility requirements _____	☐	☐																
33. All of an Employee's Years of Service with the Employer are counted to determine the Vested Percentage in the Participant's Employer Contribution except: ☐ (a) N/A. All Years of Service will count toward Vesting ☐ (b) Years of Service before age 18 ☐ (c) Years of Service before the Employer maintained this Plan or a predecessor plan																			
34. Each Participant's Vested Percentage in his Employer Contribution Account shall be determined as follows:																			
		Nonelective	Matching																
☒ (a)	Vesting Formula #1 - 100% vested at all times	☒	☐																
☐ (b)	Vesting Formula #2 - 100% vested after _____ (not to exceed three) Years of Service	☐	☐																
☐ (c)	Vesting Formula #3: <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: left;"><u>Years of Service</u></td> <td style="text-align: left;"><u>Vested Percentage</u></td> </tr> <tr> <td>Less than 1</td> <td>_____</td> </tr> <tr> <td>1</td> <td>_____</td> </tr> <tr> <td>2</td> <td>_____ (not less than 20%)</td> </tr> <tr> <td>3</td> <td>_____ (not less than 40%)</td> </tr> <tr> <td>4</td> <td>_____ (not less than 60%)</td> </tr> <tr> <td>5</td> <td>_____ (not less than 80%)</td> </tr> <tr> <td>6 or more</td> <td>100%</td> </tr> </table>	<u>Years of Service</u>	<u>Vested Percentage</u>	Less than 1	_____	1	_____	2	_____ (not less than 20%)	3	_____ (not less than 40%)	4	_____ (not less than 60%)	5	_____ (not less than 80%)	6 or more	100%	☐	☐
<u>Years of Service</u>	<u>Vested Percentage</u>																		
Less than 1	_____																		
1	_____																		
2	_____ (not less than 20%)																		
3	_____ (not less than 40%)																		
4	_____ (not less than 60%)																		
5	_____ (not less than 80%)																		
6 or more	100%																		
☐ (d) Notwithstanding the Vesting Formula selected above, all Participants as of _____ will be 100% vested.																			
35. Forfeitures not used to restore Participant's Accounts or pay expenses will be (choose one):																			
		Nonelective	Matching																
☐ (a)	allocated in addition to the Employer Contributions	☐	☐																
☐ (b)	used to reduce any required Employer contributions	☐	☐																
☐ (c)	used to reduce Employer Matching Contributions and any remainder allocated in addition to the Employer Contribution	☐	☐																

☐ (d) used to reduce Employer Contributions in the following order and manner: ☐ (1) for the current Plan Year ☐ (2) for the subsequent Plan Year ☐ (3) Other (describe; must be determined on a nondiscriminatory basis): _____		☐	☐
☒ (e) N/A. 100% vesting has been elected and there are no forfeitures under the Plan.			
36. Forfeitures arising on account of termination of employment shall be allocated as of the last day of the Plan Year which is concurrent with or next follows:			
☐ (a)	Employee's termination of employment		
☐ (b)	Employee having incurred a 1-year Break in Service		
☐ (c)	Employee having incurred 2 consecutive 1-year Breaks in Service		
☐ (d)	Employee having incurred 5 consecutive 1-year Breaks in Service		
☐ (e)	The later of the payment of the vested benefit or the Employee having incurred 5 consecutive 1-year Breaks in Service		
☒ (f)	N/A. 100% vesting has been elected and there are no forfeitures under the Plan.		
OVERRIDING LANGUAGE FOR MULTIPLE PLANS			
37. If the Participant is covered under another Section 403(b) plan of the Employer, other than a Section 403(b) Volume submitter or prototype plan, the provisions of Section 5.01 of Article V will apply as if the other plan were a Section 403(b) volume submitter or prototype 403(b) plan.			
RELIANCE ON ADVISORY LETTER AND ACKNOWLEDGEMENTS			
38. Reliance and Acknowledgements: • This Adoption Agreement may be used only in conjunction with basic Plan Document #04. • The Sponsor will inform the adopting Employer of any amendments it makes to the Plan or of its discontinuance or abandonment of the Plan. • The Employer must complete a new signature page if it modifies any prior elections or makes new elections in its Adoption Agreement. • Failure to properly complete this Adoption Agreement may result in loss of favorable tax treatment for the Plan. The Employer's tax advisor should review the Plan and this Adoption Agreement prior to the Employer adopting such plan. • The Employer may rely on the Advisory Letter issued for the approved specimen plan, except to the extent that the Employer's Plan is not identical to the approved specimen plan, disregarding any differences attributable solely to the Employer's choices of options provided under the specimen plan.			
AUTHORIZED SIGNATURE AND CERTIFICATION			
39. The undersigned Employer acknowledges receipt of a copy of the Plan, Administrative Appendix and this Adoption Agreement on the date indicated below. The adopting Employer by signing below certifies that: • The Employer is an educational organization described in section 170(b)(1)(A)(ii); and • For purposes of the nondiscrimination requirements of section 403(b)(12) the Plan is a Governmental Plan within the meaning of section 414(d) of the Code of a Public School; or a Governmental Plan of an organization described in section 501(c)(3) of the Code.			
Name of Employer: <u>Fox Chapel Area School District</u>			
Signature of Employer:		Date: October 9, 2023	
Name of Signer: Marybeth Dadd		Title: School Board President	

ADMINISTRATIVE APPENDIX

EMPLOYER NAME: Fox Chapel Area School District

PART A: RESPONSIBILITIES

The following checklist outlines responsibilities associated with the Plan and the entity obligated to each item. If there is an item without an assignment of responsibility, such item becomes the duty of the Employer as the sponsor of the plan.

		TPA	Vendor(s)	Employer	Other (specify)	N/A
I. PLAN FINANCIAL REPORTING						
1.	Review and verify accuracy of Spark File or other Data Sharing Information and notify Vendor of errors. (This includes an annual audit to make sure that all amounts and sourcing did get credited to the proper participant in the Plan.)	☒	☐	☐		☐
II. ENROLLMENT OF PARTICIPANTS						
2.	If applicable, provide Employee census information prior to each entry date to determine eligibility	☐	☐	☐		☒
3.	Evaluate eligibility to determine who enters the plan on each entry date	☐	☐	☐		☒
4.	Provide enrollment forms to eligible employee (for deferral elections, investment elections, and beneficiary designations)	☒	☒	☒		☐
5.	Provide mandatory notices at enrollment for Universal Availability	☒	☐	☒		☐
6.	Provide other required notices at enrollment, such as "deemed" control group (owning outside business)	☐	☐	☒		☐
7.	Verify deferral percentage for new participants	☐	☐	☐		☒
8.	Analyze eligibility service and vesting service to be credited to rehired employees	☐	☐	☐		☒
9.	If Plan does not provide for full and immediate vesting, determine forfeitures that must be restored for rehired participants	☐	☐	☒		☐
10.	If certain types of compensation is excluded, evaluate compensation types for participant and ensure that deferrals are being removed from all relevant compensation types (check exclusions, e.g., stipends, coaching bonuses, club sponsorships)	☐	☐	☒		☐
11.	Confirm that proposed deferrals do not exceed plan defined limits or legal maximums	☒	☐	☒		☐

ADMINISTRATIVE APPENDIX

		TPA	Vendor(s)	Employer	Other (specify)	N/A
12.	Verify entry and commencement of deferrals for new participants	☐	☐	☒		☐
13.	Provide completed enrollment forms to Vendor (Agent)	☐	☒	☐		☐
14.	Maintain copies of deferral and investment elections and all changes made	* ☒	☐	☐	*SRA Services Only	☐
15.	Collect and maintain copies of beneficiary designations and changes to same	☐	☒	☐		☐
16.	If Plan does not provide for full and immediate vesting, determine initial vesting computation period	☐	☐	☒		☐
III. CONTRIBUTION DETERMINATION						
17.	Identify census parameters	☐	☐	☐		☒
18.	Provide census information to determine contribution limits, vesting	☐	☐	☒		☐
19.	If Employees are not immediately eligible, determine employees eligible to participate in each type of contribution allocation	☐	☐	☐		☒
20.	Verify type of contributions made (pre-tax deferral, Roth, employer, rollovers, etc.)	☒	☒	☒		☐
21.	If compensation is excluded, determine includible compensation for participant for each type of contribution, if different	☐	☐	☒		☐
22.	Determine amount of each type of employer contribution for each participant	☐	☐	☒		☐
23.	If Plan accepts Employer contributions, determine amount of true-up matching contribution at year end (if any)	☐	☐	☒		☐
24.	If Plan accepts Employer contributions, verify that matching contributions do not exceed plan defined limits	☒	☐	☒		☐
25.	If Plan accepts Employer contributions, determine maximum contribution under IRC §415 and verify that contributions do not exceed that limit	☒	☐	☒		☐
26.	Determine and maintain records of separate accounting for all types of contributions	☒	☒	☒		☐

ADMINISTRATIVE APPENDIX

		TPA	Vendor(s)	Employer	Other (specify)	N/A
IV. VESTING AND FORFEITURES						
27.	Determine and maintain records of vesting service	☐	☐	☒		☐
28.	Determine and maintain records of vested percent	☐	☐	☒		☐
29.	Determine timing of forfeiture from a participant's account	☐	☐	☒		☐
30.	Determine use of forfeiture	☐	☐	☒		☐
31.	Determine amount to be contributed based on use of forfeitures to reduce employer contribution (if applicable)	☐	☐	☒		☐
V. OTHER ALLOCATIONS						
32.	Allocate investment gains/losses	☐	☒	☐		☐
33.	Allocate contribution	☐	☒	☐		☐
VI. ANNUAL COMPLIANCE LIMITATIONS						
34.	Prepare annual Universal Availability Notice	☒	☐	☒		☐
35.	Deliver annual Universal Availability Notice	☐	☐	☒		☐
36.	Monitor statutory limits – Annual 415 limit, Compensation §401(a)(17), Elective Deferrals §402(g), Age 50 Catch-up §414(v), 15 year Catch-up	☒	☐	☐		☐
37.	Determine if additional plans must be aggregated with this Plan for overall limits	☒	☐	☐		☐
VII. ELECTIVE DEFERRALS						
38.	Process and verify deferral elections each payroll period to ensure proper deferral by participant, including deferral changes	☒	☐	☒	*SRA Services Only	☐
39.	Reconcile deferral changes made between payrolls	☒	☐	☒	*SRA Services Only	☐
40.	Provide annual mandatory notices (Universal Availability, Automatic Enrollment, Other _____) (if applicable)	☒	☐	☒		☐
41.	If Universal Availability failed, determine amount to be contributed with lost earnings. Amounts are contributed as earmarked as a QNEC (employer contribution). Amend plan to accept QNECs if necessary	☐	☐	☐		☒

ADMINISTRATIVE APPENDIX

		TPA	Vendor(s)	Employer	Other (specify)	N/A
42.	Ensure deposits of salary deferrals are made to Vendor within required timeframe	* ☒	☐	☒	*If Common Remitting Provided	☐
VIII. DISTRIBUTIONS OF BENEFITS						
43.	Prepare and maintain distribution notices and elections	☐	☒	☐		☐
44.	Provide distribution forms to participant, including 402(f) notice for rollover information	☐	☒	☐		☐
45.	Review distribution forms to see if fully completed and signed by appropriate parties	☒	☒	☐		☐
46.	Evaluate eligibility to receive a distribution	☒	☒	☐		☐
47.	Authorize distributions and other transactions	☒	☒	☐		☐
48.	Confirm vested interest on termination of employment	☐	☒	☐		☐
49.	Determine amount to be distributed	☒	☒	☐		☐
50.	If Plan permits Roth Deferrals, determine basis in Roth Distributions	☐	☒	☐		☐
51.	If Plan permits Roth Deferrals, determine and maintain beginning date for Roth qualification period	☐	☒	☐		☐
52.	If Plan permits Roth Deferrals, determine whether Roth distribution is qualified	☒	☒	☐		☐
53.	Proper Income tax withholding deposit made and IRS reporting on Form 945	☐	☒	☐		☐
54.	Form 1099-R provided to participant and IRS	☐	☒	☐		☐
55.	Determine cash-out amounts for the year (e.g., accounts for terminated participants with less than \$1,000 value). Only available for Group Annuities or Group Custodial Agreements	☐	☐	☐		☒
56.	If elected under the Plan, determine amounts to be moved to an automatic IRA rollover (e.g., amounts for terminated participants with \$1,000 to \$5,000 in value)	☐	☐	☐		☒
57.	If permitted under the Plan, evaluate eligibility for hardship distribution	☒	☐	☐		☐
58.	If permitted under the Plan, notify of ceasing deferrals for 6 months, confirm that deferrals have ceased, solicit new deferral form after 6 months	☐	☐	☐		☒

ADMINISTRATIVE APPENDIX

		TPA	Vendor(s)	Employer	Other (specify)	N/A
59.	Evaluate proposed QDRO to determine if it qualifies as such	☒	☐	☐		☐
60.	Communicate to participant/former spouse regarding QDRO receipt (and provide copy of QDRO Policy) and QDRO determination	☒	☐	☐	Legal Counsel	☐
61.	Segregate account and initiate distribution to Alternate Payee	☐	☒	☐		☐
62.	Authorize and verify requirements for Exchanges, 403(b) Transfers and Transfers to State DB Plan	☒	☐	☐		☐
IX. PARTICIPANT LOAN, IF AVAILABLE						
63.	Provide copy of loan procedure/policies to participants	☐	☒	☐		☐
64.	Prepare and retain loan documents (e.g., promissory note, etc.) for each participant loan	☐	☒	☐		☐
65.	Determine maximum amount that may be borrowed	☒	☒	☐		☐
66.	Provide Loan Request Forms to participants	☐	☒	☐		☐
67.	Confirm proper completion of loan application	☐	☒	☐		☐
68.	Approve loan	☒	☐	☐		☐
69.	Verify that proper loan payment procedures are in place	☐	☒	☐		☐
70.	Determine defaulted and offset loans	☐	☒	☐		☐
71.	Prepare Form 1099-R on defaulted loan	☐	☒	☐		☐
X. MISCELLANEOUS						
72.	Identify participants required to take a Required Minimum Distribution (RMD), including terminated employees, beneficiaries	☐	☒	☐		☐
73.	Provide timely notice of RMD requirement	☐	☒	☐		☐
74.	Determine minimum distribution amount	☐	☒	☐		☐
75.	Annually review of all Vendor documents including distribution forms, custodial agreements, annuity contracts, withholding notices and elections, etc.	☐	☒	☐		☐

ADMINISTRATIVE APPENDIX

		TPA	Vendor(s)	Employer	Other (specify)	N/A
XI. PLAN QUALIFICATION						
76.	Prepare Plan document	☒	☐	☐		☐
77.	Prepare Amendments, Required and optional	☒	☐	☐		☐
78.	Prepare written procedures/policies, where applicable	☒	☐	☒		☐

ADMINISTRATIVE APPENDIX

Non-ERISA 403(b) FOR PUBLIC SCHOOLS

PART B: PLAN VENDOR SCHEDULE

This Schedule may be amended from time to time and must be completed and executed by the Employer. Complete multiple pages if necessary.

Please note the following procedures for Transfer/Exchanges:

- The minimum amount for Transfers/Exchanges shall be \$0.00.
- Exchanges will be permitted between all Vendors in sections I and II unless otherwise restricted. Please specify any restrictions here: The participant must have a pre-existing account with the section II vendor.
- Transfers are permitted at any time unless restricted as follows:-N/A

I. LIST OF APPROVED VENDORS

These Vendors are authorized to establish new participant accounts, receive ongoing contributions and incoming Transfers and Exchanges (unless restricted above) from Approved Vendors and Grandfathered Vendors.

Name of Vendor	Funding Vehicle	
	Custodial Agreement	Annuity Contract
American Fidelity Assurance Co.	☒	☒
Ameriprise Financial/RiverSource	☒	☒
Brighthouse Life Ins (MetLife CT/Travelers)	☒	☒
Corebridge Financial (formerly AIG/VALIC)	☒	☒
Equitable (formerly AXA)	☒	☒
Invesco OppenheimerFunds	☒	☐
Kades-Margolis	☒	☒
Lincoln Investment Planning	☒	☒
NY Life Ins. & Annuity Corp.	☒	☒
PenServ SmartSAV (formerly Foresters)	☒	☒
PlanMember Services Corp.	☒	☒
Security Benefit	☒	☒
Voya Financial (VRIAC)	☒	☒

II. LIST OF GRANDFATHERED VENDORS

These Vendors are authorized to receive ongoing contributions and incoming Transfers and Exchanges (unless restricted above) from Approved Vendors and Deselected Vendors. Assets are not available for Participant Loans and Hardship Distributions unless other procedures apply; specify: The consistent receipt of electronic plan level information is required.

Name of Vendor	Funding Vehicle	
	Custodial Agreement	Annuity Contract
American Fund/Capital Guardian	☒	☐
Fidelity Management Trust	☒	☐
Great American Insurance Group	☒	☒
Putnam Investments	☒	☒
Vanguard Fiduciary Trust Co.	☒	☐

Employer Name: **Fox Chapel Area School District**

Effective Date of Plan Vendor Schedule: ☐ Immediate; or ☒ on August 29, 2023.

Note: The Plan Vendor Schedule is no longer a part of the 403(b) Plan document. Employers may therefore change the investment providers without completing a new Adoption Agreement.

Fox Chapel Area School District

Agenda Study Session

October 2, 2023

Fox Chapel Area School District Comprehensive Plan

FOX CHAPEL AREA SD

611 Field Club Rd

Comprehensive Plan | 2023 - 2026

MISSION STATEMENT

The Fox Chapel Area School District exists to maximize learning, achievement, and growth through a focus on educating the whole student.

VISION STATEMENT

The Fox Chapel Area School District will engage students in a learning community that values belonging and focuses on the education of the whole student through four pillars for success: Purpose: Learning and teaching through inclusive, standards-aligned, and culturally responsive approaches that meet the needs of all students, while monitoring growth and success through a data-informed approach for continuous improvement; Passion: Providing students with authentic learning experiences that motivate them to pursue their interests with a focus on educating the whole student; Care: Fostering safe and supportive learning environments that value the diversity, individuality, social and emotional wellness, and belonging of all students; Community: Partnering and collaborating with the community

EDUCATIONAL VALUE STATEMENTS

STUDENTS

The district has created three core values that are used to guide all stakeholders: Respect: Valuing self and others; caring for one's environment; and pride in positive actions; Responsibility: Accountability; taking ownership of what you do; and listening and following through; Integrity: Doing the right thing (even when no one is watching); being honest with self and others; and trustworthiness in thoughts, words, and actions

STAFF

All students want to learn, are capable of learning, and share in the responsibility for their education. Educators must be knowledgeable and current in their profession, discipline, and pedagogy. Responsive schools take a leading role in promoting safety and wellness. Effective schools are built upon integrity and foster respectful, inclusive, and dynamic environments.

ADMINISTRATION

All students want to learn, are capable of learning, and share in the responsibility for their education. Educators must be knowledgeable and current in their profession, discipline, and pedagogy. Effective schools are built upon integrity and foster respectful, inclusive, and dynamic environments. Fiscal decisions must effectively balance the educational needs of the students and the resources of the community. Schools of excellence have effective educational leaders. Responsive schools take a leading role in promoting safety and wellness.

PARENTS

It is important for each member of the educational community to recognize and respect all forms of diversity. Contributing partners in the educational process include all district staff, students, families, and the community.

COMMUNITY

It is important for each member of the educational community to recognize and respect all forms of diversity. Contributing partners in the

educational process include all district staff, students, families, and the community.

OTHER (OPTIONAL)

STEERING COMMITTEE

Name	Position	Building/Group
Dr. Mary Catherine Reljac	Administrator	Superintendent of Schools
Dr. David McCommons	Administrator	Deputy Superintendent of Schools
Dr. Stephen Edwards	Administrator	Director of Student Achievement and Instructional Verification
Dr. Michael Hower	Administrator	Lead Principal, Fox Chapel Area High School
Mr. Jonathan Nauhaus	Administrator	Principal, Dorseyville Middle School
Dr. Paul Noro	Administrator	Principal, Kerr Elementary School
Ms. Kimberly Andrews	Board Member	Fox Chapel Area School District
Mrs. Amy Cooper	Board Member	Fox Chapel Area School District
Ms. Marybeth Dadd	Board Member	Fox Chapel Area School District
Brigitte Patrick	Parent	Fox Chapel Area School District
Deborah Desjardins	Parent	Fox Chapel Area School District
David Turner	Parent	Fox Chapel Area School District
Adam Bright	Community Member	Fox Chapel Area School District

Name	Position	Building/Group
Jessie Handron	Community Member	Fox Chapel Area School District
Katie Kenyon	Community Member	Fox Chapel Area School District
John Anderson	Other	Fox Chapel Area School District
Kristen Bost	Other	Fox Chapel Area School District
Mimi Loeffler	Other	Fox Chapel Area School District
Lesley Cowles	Other	Fox Chapel Area School District
Megan Jarrett	Other	Fox Chapel Area School District

ESTABLISHED PRIORITIES

Priority Statement	Outcome Category
Purpose: Utilizing systems and curriculums for identifying student needs and addressing them through individualized and differentiated instruction to meet the needs of all learners	Essential Practices 1: Focus on Continuous Improvement of Instruction
Community: Enhancing community and stakeholder involvement coinciding with the district's Mission, Vision, Values, and Beliefs	Community Engagement
Passion: Providing students with authentic learning experiences that motivate them to pursue their interests with a focus on educating the whole student	Rigorous Courses of Study Section
Care: Identifying and addressing areas of need in regard to student and staff mental health/wellness	Wellness

ACTION PLAN AND STEPS

Evidence-based Strategy	
Purpose	
Measurable Goals	
Goal Nickname	Measurable Goal Statement (Smart Goal)

Goal Nickname

Measurable Goal Statement (Smart Goal)

to monitor student growth thought the school year. The development of teacher designed instructional response plans will be used to identify the areas of focus in mathematics, reading, and science for students demonstrating areas of need (enrichment or remediation) in particular content areas or standards.

Action Step

**Anticipated
Start/Completion**

**Lead
Person/Position**

**Materials/Resources/Supports
Needed**

Further the development of the district's response to data and instructional planning model through the incorporation of 3-4 benchmarking windows in the areas of mathematics, reading, and science.

2023-09-01 -
2026-09-01

District
Administration

Quarterly benchmarking
data and analysis

Using data from benchmarking assessments, building principals will work with teachers to develop instructional response plans that individualize instruction based on areas of need.

2023-09-01 -
2026-09-01

Building
Principals /
Teachers

Instructional response plans
by teacher, overseen by
building principals

Anticipated Outcome

The number of students performing below the 50th percentile rank in mathematics, reading, and science will decrease throughout the school year.

Monitoring/Evaluation

STAR Reading, STAR Mathematics, and Science CDT will be administered 3-4 times per year. All students in grades K-8 will take STAR Math, Reading, and/or STAR Early Literacy. The Science CDT will be administered to all 4th and 8th grade students. Select high school students preparing for their Keystone Exams will also take STAR Reading, STAR Algebra, or the Biology CDT.

Evidence-based Strategy				
Community				
Measurable Goals				
Goal Nickname	Measurable Goal Statement (Smart Goal)			
Community	The district will create opportunities to engage the community and its stakeholders in collaborative opportunities (i.e. educational activities, informational seminars, family learning events, etc.) that support the development of the whole student.			
Action Step	Anticipated Start/Completion	Lead Person/Position	Materials/Resources/Supports Needed	
The district will create and support opportunities to engage the community and its stakeholders in collaborative opportunities (i.e., educational activities, informational seminars, family learning events, etc.) that support the development of the whole student.	2023-09-01 - 2026-09-01	District Administration	Community partnerships, stakeholder involvement, and communication	
Anticipated Outcome				
The district will identify areas to further engage community stakeholders and develop partnerships within the community and implement avenues for learning through educational activities, informational seminars, family learning events, etc.				
Monitoring/Evaluation				

Overview of opportunities provided and/or available to students, staff, families, and community members, and participation in these opportunities.

Evidence-based Strategy				
Passion				
Measurable Goals				
Goal Nickname	Measurable Goal Statement (Smart Goal)			
Passion	Diversify the instructional opportunities available to students through engaging learning activities that focus on educating the whole student.			
Action Step	Anticipated Start/Completion	Lead Person/Position	Materials/Resources/Supports Needed	
Develop instructional activities that promote and support real-life/world experiences. Research, identify, and develop partnerships with local universities and community programs to offer students diverse learning experiences including but not limited to College in High School and Career Exploration (K-12), etc.	2023-09-01 - 2026-09-01	District Administration	Dual enrollment agreements and local partnerships (JA Biztown)	
Anticipated Outcome				
Implement programs and activities in conjunction with community and higher education partnerships that provide students with real-life learning opportunities. Develop instructional lessons and activities that correlate with real-world experiences, including those that support				

career exploration.

Monitoring/Evaluation

Increase the number of opportunities for students and partnerships within the community. Gather feedback through methods of data collection.

Evidence-based Strategy	
Care	

Measurable Goals

Goal Nickname	Measurable Goal Statement (Smart Goal)
Care	The district will continue to promote wellness activities for students and staff throughout the school year and will identify new forms of data collection to measure needs of student and staff wellness.

Action Step	Anticipated Start/Completion	Lead Person/Position	Materials/Resources/Supports Needed
The district will continue to promote wellness activities for staff and students throughout the school year and will identify new forms of data collection to measure needs of student and staff wellness and outcomes.	2023-09-01 - 2026-09-01	Wellness Team	Data collection tools

Anticipated Outcome

The district will identify areas of strength and need in regard to student and staff wellness and provide resources and opportunities to address needs.

Monitoring/Evaluation

Data collection tools

COMMUNICATION PLAN - STEPS AND TIMELINES:

Measurable Goals	Action Plan Name	Communication Step	Anticipated Timeline
The district will create opportunities to engage the community and its stakeholders in collaborative opportunities (i.e. educational activities, informational seminars, family learning events, etc.) that support the development of the whole student. (Community)	Community	The district will create and support opportunities to engage the community and its stakeholders in collaborative opportunities (i.e., educational activities, informational seminars, family learning events, etc.) that support the development of the whole student.	09/01/2023 - 09/01/2026

COMMUNICATION PLAN - STEPS AND TIMELINES:

Measurable Goals	Action Plan Name	Communication Step	Anticipated Timeline
The district will continue to promote wellness activities for students and staff throughout the school year and will identify new forms of data collection to measure needs of student and staff wellness. (Care)	Care	The district will continue to promote wellness activities for staff and students throughout the school year and will identify new forms of data collection to measure needs of student and staff wellness and outcomes.	09/01/2023 - 09/01/2026

APPROVALS & SIGNATURES

Assurance of Quality and Accountability

As Chief School Administrator, I affirm that this LEA Level Plan was developed in accordance, and will comply with the applicable provisions of 22 Pa. Code, Chapters 4, 12, 14, 16 and 49. I also affirm that the governing board reviewed the LEA Level Plan, as indicated in the attached official Board minutes and the contents of the plan are true and correct. Finally, I affirm that the plan was made available for public inspection and comment for a minimum of 28 days prior to approval by the school's governing board and submission to the Department.

Signature (Entered Electronically and must have access to web application).

Chief School Administrator

ADDENDUM A: BACKGROUND INFORMATION TO INFORM PLAN

Strengths	Challenges
The district is meeting or exceeding achievement standards on PSSA and Keystone Exams in nearly all subject areas and across all schools.	While the percentages of students scoring proficient and advanced on PSSAs were consistent, the growth expectations at some schools did not meet the statewide goals (Fairview - ELA, Hartwood - Science/Math, O'Hara - Math, & Dorseyville ~ - ELA/Science).
All schools are meeting or exceeding State College and Career Reading Measures. Each school has content areas where they are meeting or exceeding growth measures, based on PVAAS calculations, on the Keystone Exams and PSSAs	The percentage of students scoring proficient or advanced on the English Language Arts PSSA decreases as students advance through elementary school (3rd Grade - 89.3%, 4th Grade - 80.8%, 5th Grade - 81%).
All 4 elementary schools are exceeding statewide goals for the percentage of proficient and advanced students on the ELA, Mathematics, and Science PSSAs. Fox Chapel Area High School is exceeding Keystone Exam (Algebra, Biology, and Literature) statewide academic growth expectations, based on the Pennsylvania Department of Education's PVAAS calculations for the 2021-2022 school year.	44.7% of 7th-grade students were not proficient on the 2021-2022 Math PSSA.
50% of students scored advanced on the 2021-2022 ELA PSSA.	There are some differences in the percentage of students proficient/advanced on the 2021-2022 Math PSSA when comparing schools(Fairview - 92.1%, Hartwood - 81.3%, Kerr - 77.3%, O'Hara - 84.2%, and DMS - 62.9%). The number of students proficient or advanced on the 2021-2022 winter Biology Keystone Exam is lower than in the spring.

Strengths

All 4 elementary schools and Dorseyville Middle School had more than 80% of students score proficient or advanced on their 2021-2022 PSSA.

The PASS Survey shows overall positive perceptions about school within each demographic area.

The district's Title I school had high levels of proficiency on the mathematics, ELA, and science PSSAs.

More student scored advanced than proficient on the 2021-2022 ELA PSSA.

Proficient and advanced percentages on the winter and spring Keystone Exams are relatively similar, which shows consistency among instruction/courses/outcomes.

98.7% of Dorseyville Middle School students taking the 2021-2022 spring Algebra Keystone Exam scored proficient (15.1%) or advanced (83.6%).

All four elementary schools had more than 75% of students score proficient or advance on their 2021-2022 Mathematics PSSA

89.1% of 3rd grade students scored proficient or advanced on the 2021-2022 Mathematics PSSA

Challenges

Although these are students who are typically retaking the assessment, considerations for improving these score should be considered.

The number of students proficient and advanced on the 2021-2022 Science PSSA is above 90% in all elementary schools with the exception of one (89.7%), and that school has the least amount of students who scored advanced.

There are variances in the number of students achieving proficient and advanced among schools within different sub groups, specifically students with disabilities.

How can the district provide individualized education to support the academic needs of all students?

How can the district continue to develop supports for staff and students centered around wellness?

How will the district further engage and utilize community partnerships to further support the development of the whole student?

What additional learning opportunities can the district provide for real-world experiences that align to students' interests and future careers?

Strengths

60% of students scored advanced in the spring Algebra Keystone Exam.

60% of students scored advanced in the 2021-2022 Spring Biology Keystone Exam.

All four elementary schools scored above 85% proficient or advanced on the 2021-2022 Science PSSA.

77% of elementary students scored advanced on the 2021-2022 Science PSSA.

87.6% of students who took AP exams during the 2021-2022 school year scored a 3 (17.92%), 4 (30.17%), or 5 (39.53%).

100% of all elementary students are meeting college and career measures. All Fox Chapel Area elementary schools are exceeding statewide standards of performance for students meeting the Career Standards Benchmark.

All schools within the district are either meeting or exceeding statewide standards of performance for students meeting the Career Standards Benchmark.

The district's Multi-Tiered System of Supports is used to support all students within the district.

The district technology plan ensures equitable access to

Challenges

How can we create more opportunities for students to gain experience in the fields or trades that they hope to pursue after high school?

How can we create more opportunities for students to earn more college level credits prior to graduation?

Strengths

technology and devices for all students.

The district has implemented systems and curriculums for identifying student needs and addressing them through individualized and differentiated instruction to meet the needs of all learners.

Professional development for school staff and administrators is ongoing and is used to keep educators informed on the newest challenges that our students and community are facing. This is most recognizable in the district's efforts to support Equity, Inclusion, and Belonging training for its staff.

Organizational and instructional coherence is a consistent goal of the district. Ensuring instructional fidelity and coherence among the schools is promoted through ongoing professional development and monitored through data collection and instructional observations.



Most Notable Observations/Patterns

The district has long established its ability to grow students academically through an inclusive and systematic approach. Differentiation and meeting the needs of students are current strengths, as well as growing students who come from lower socioeconomic backgrounds. Considerations for educating the whole student need to be included in the reshaping of the district's mission and vision. Also, more consideration for how to involve the community and get students involved in the community need to be considered.

Challenges	Discussion Point	Priority for Planning
How can the district continue to develop supports for staff and students centered around wellness?	The vision statement is an area of focus that considers how we educate the whole student.	✓
How can the district provide individualized education to support the academic needs of all students?	Utilization of the district's benchmarking and data analysis process can be used to individualize learning for students.	✓
How will the district further engage and utilize community partnerships to further support the development of the whole student?	Consider how to incorporate community involvement within mission/vision and focus on the whole student.	✓
What additional learning opportunities can the district provide for real-world experiences that align to students' interests and future careers?	Providing students with authentic learning experiences that motivate them to pursue their interests with a focus on educating the whole student.	✓

ADDENDUM B: ACTION PLAN

Action Plan: Purpose

Action Steps	Anticipated Start/Completion Date
Further the development of the district's response to data and instructional planning model through the incorporation of 3-4 benchmarking windows in the areas of mathematics, reading, and science.	09/01/2023 - 09/01/2026

Monitoring/Evaluation	Anticipated Output
STAR Reading, STAR Mathematics, and Science CDT will be administered 3-4 times per year. All students in grades K-8 will take STAR Math, Reading, and/or STAR Early Literacy. The Science CDT will be administered to all 4th and 8th grade students. Select high school students preparing for their Keystone Exams will also take STAR Reading, STAR Algebra, or the Biology CDT.	The number of students performing below the 50th percentile rank in mathematics, reading, and science will decrease throughout the school year.

Material/Resources/Supports Needed	PD Step	Comm Step
Quarterly benchmarking data and analysis	no	no



Action Steps	Anticipated Start/Completion Date	
Using data from benchmarking assessments, building principals will work with teachers to develop instructional response plans that individualize instruction based on areas of need.	09/01/2023 - 09/01/2026	
Monitoring/Evaluation	Anticipated Output	
STAR Reading, STAR Mathematics, and Science CDT will be administered 3-4 times per year. All students in grades K-8 will take STAR Math, Reading, and/or STAR Early Literacy. The Science CDT will be administered to all 4th and 8th grade students. Select high school students preparing for their Keystone Exams will also take STAR Reading, STAR Algebra, or the Biology CDT.	The number of students performing below the 50th percentile rank in mathematics, reading, and science will decrease throughout the school year.	
Material/Resources/Supports Needed	PD Step	Comm Step
Instructional response plans by teacher, overseen by building principals	no	no

Action Plan: Community

Action Steps		Anticipated Start/Completion Date
The district will create and support opportunities to engage the community and its stakeholders in collaborative opportunities (i.e., educational activities, informational seminars, family learning events, etc.) that support the development of the whole student.		09/01/2023 - 09/01/2026
Monitoring/Evaluation	Anticipated Output	
Overview of opportunities provided and/or available to students, staff, families, and community members, and participation in these opportunities.	The district will identify areas to further engage community stakeholders and develop partnerships within the community and implement avenues for learning through educational activities, informational seminars, family learning events, etc.	
Material/Resources/Supports Needed	PD Step	Comm Step
Community partnerships, stakeholder involvement, and communication		yes

Action Plan: Passion

Action Steps	Anticipated Start/Completion Date
Develop instructional activities that promote and support real-life/world experiences. Research, identify, and develop partnerships with local universities and community programs to offer students diverse learning experiences including but not limited to College in High School and Career Exploration (K-12), etc.	09/01/2023 - 09/01/2026
Monitoring/Evaluation	Anticipated Output
Increase the number of opportunities for students and partnerships within the community. Gather feedback through methods of data collection.	Implement programs and activities in conjunction with community and higher education partnerships that provide students with real-life learning opportunities. Develop instructional lessons and activities that correlate with real-world experiences, including those that support career exploration.
Material/Resources/Supports Needed	PD StepComm Step
Dual enrollment agreements and local partnerships (JA Biztown)	no no

Action Plan: Care

Action Steps		Anticipated Start/Completion Date
The district will continue to promote wellness activities for staff and students throughout the school year and will identify new forms of data collection to measure needs of student and staff wellness and outcomes.		09/01/2023 - 09/01/2026
Monitoring/Evaluation		Anticipated Output
Data collection tools		The district will identify areas of strength and need in regard to student and staff wellness and provide resources and opportunities to address needs.
Material/Resources/Supports Needed		PD Step Comm Step
Data collection tools		no yes

ADDENDUM C: PROFESSIONAL DEVELOPMENT PLANS

Measurable Goals

Action Plan
Name

Professional
Development Step

Anticipated
Timeline

PROFESSIONAL DEVELOPMENT PLANS

ADDENDUM D: ACTION PLAN COMMUNICATION

Measurable Goals	Action Plan Name	Communication Step	Anticipated Timeline
The district will create opportunities to engage the community and its stakeholders in collaborative opportunities (i.e. educational activities, informational seminars, family learning events, etc.) that support the development of the whole student. (Community)	Community	The district will create and support opportunities to engage the community and its stakeholders in collaborative opportunities (i.e., educational activities, informational seminars, family learning events, etc.) that support the development of the whole student.	2023-09-01 - 2026-09-01
The district will continue to promote wellness activities for students and staff throughout the school year and will identify new forms of data collection to measure needs of student and staff wellness. (Care)	Care	The district will continue to promote wellness	2023-09-01 - 2026-09-01

Measurable Goals

Action Plan Name

Communication Step

Anticipated Timeline

activities for staff and students throughout the school year and will identify new forms of data collection to measure needs of student and staff wellness and outcomes.

COMMUNICATIONS PLAN

Communication Step

Audience

Topics/Message of Communication

Community

Community Stakeholders: Students, staff, parents, teachers, administrators, community members, local businesses, etc.

Communication of upcoming events (educational activities, informational seminars, family learning events, etc.) on school and community related topics.

Anticipated Timeframe	Frequency	Delivery Method
09/01/2023 - 09/01/2026	As events occur	Email Letter Posting on district website Newsletter
Lead Person/Position		
District Administration		
Communication Step	Audience	Topics/Message of Communication
Care	Students, staff, parents, teachers, administrators, community stakeholders, local businesses, etc.	Resources and events to support mental health and wellness.
Anticipated Timeframe	Frequency	Delivery Method
09/01/2023 - 09/01/2026	As events occur or information becomes available	Email Letter Newsletter Posting on district website

Lead Person/Position

District Administration

ADDENDUM E: COMPREHENSIVE PLAN COMMUNICATIONS

Communication Step	Topics of Message	Mode	Audience	Anticipated Timeline
The district will be introducing its newly-designed Strategic Vision, which was created in conjunction with the development of the comprehensive plan. The Strategic Vision will be shared and communicated with all stakeholders at the start of the 2023-2024 school year and will be used to guide future goal setting and decision making.	The Strategic Vision: Purpose, Passion, Care, and Community	Back-to-School meetings with teachers and parents. Email, website, and flyers will also be used to share the comprehensive plan and Strategic Vision.	All district stakeholders	Introduce in August of 2023 with updates occurring throughout the school year.

FOX CHAPEL AREA SD

611 Field Club Rd

Induction Plan (Chapter 49) | 2023 - 2026

INDUCTION PLAN (CHAPTER 49)

Chapter 4 establishes that each school entity shall submit to the Department for approval an induction plan every 6 years as required under Chapter 49, Section 16(a). A school entity shall make its induction plan available for public inspection and comment for a minimum of 28 days prior to approval of the plan by the school entity's governing board and submission of the plan to the Department.

Chapter 49.16, Approval of Induction Plans, establishes the following requirements of LEA Induction Plans:

- Each school entity shall submit to the Department for approval a plan for the induction experience for first-year teachers (including teachers in prekindergarten programs, when offered), long-term substitutes who are hired for a position for 45 days or more and educational specialists.
- The induction plan shall be prepared by teacher or educational specialist representatives, or both, chosen by teachers and educational specialists and administrative representatives chosen by the administrative personnel of the school entity. Newly employed professional personnel with prior school teaching experience may be required by the school entity to participate in an induction program.
- The induction plan shall reflect a mentor relationship between the first-year teacher, long-term substitute or educational specialist, teacher educator and the induction team.
- Criteria for approval of the induction plans will be established by the Secretary in consultation with the Board and must include induction activities that focus on teaching diverse learners in inclusive settings.

PROFILE AND PLAN ESSENTIALS

Fox Chapel Area School District
103023912
611 Field Club Road , Pittsburgh, Pennsylvania 15238

Matt Harris and Ashley Constantine
Matthew_Harris@fcasd.edu / Ashley_Constantine@fcasd.edu
4129630333 Ext.

Mary Catherine Reljac
marycatherine_reljac@fcasd.edu

INDUCTION PLAN COMMITTEE PARTICIPANTS

The Induction Plan Committee is responsible for the development and operation of the LEA’s Educator Induction Program.

In accordance with 22 PA Code Chapter 49.16 the induction committee must include teacher or educational specialist representatives, or both, selected by teachers, educational specialists, and administrative representatives from within the school/district.

STEERING COMMITTEE

Name	Title	Committee Role	Chosen/Appointed by
Matthew Harris	Executive Director of Secondary Education and Instruction	Administrator	Administration Personnel
Ashley Constantine	Executive Director of Elementary Education and	Administrator	Administration Personnel

Name	Title	Committee Role	Chosen/Appointed by
	Instruction		
Daniel Lentz	Program Principal, Fox Chapel Area High School	Administrator	Administration Personnel
Laura Miller	Program Principal, Dorseyville Middle School	Administrator	Administration Personnel
Susan Kreit	Principal, Fairview Elementary School	Administrator	Administration Personnel
Adam Goode	School Board Member	Other	School Board of Directors
Eric Hamilton	School Board Member	Other	School Board of Directors
Jessica Haselkorn	Parent	Other	School Board of Directors
Maisha Johnson	Parent	Other	School Board of Directors
Zelha Tunc Pekkan	Parent	Other	School Board of Directors
Rachael Link	Community Representative	Other	School Board of Directors
Juan Toboas	Community Representative	Other	School Board of Directors
Vanessa Torres Lauterbach	Community Representative	Other	School Board of Directors
Stephanie Reily	Teacher	Teacher	Teacher
Drew Richards	Teacher	Teacher	Teacher

Name	Title	Committee Role	Chosen/Appointed by
Kelli Schneider	Teacher	Teacher	Teacher
Colleen Kozak	Educational Specialist	Education Specialist	Education Specialist

EDUCATOR INDUCTION PLAN (EIP) (22 PA CODE, 49.16)

By checking each of the following boxes, the LEA is assuring that it complies with and has instituted each of the following Chapter 49 Induction Plan requirements.

Plan requirements	Yes/No
Will all first-year teachers (including teachers in prekindergarten programs, when offered), long-term substitutes who are hired for a position for 45 days or more and educational specialists be identified and provided a 2-year induction experience beginning in the 2024-25 SY? (22 Pa Code, 49.16)	Yes
Is the induction plan prepared by teacher or educational specialist representatives, or both, chosen by teachers and educational specialists and administrative representatives chosen by the administrative personnel of the school entity? (22 Pa Code, 49.16)	Yes
Has the plan been made available for public inspection and comment for a minimum of 28 days prior to approval of the plan by the school entity's governing board and submission of the plan to the Department? (22 Pa Code, 49.16)	Yes
Does the induction plan reflect a mentor relationship between the first-year teacher, long-term substitute or educational specialist, teacher educator and the induction team for the duration of the induction program? (22 Pa Code, 49.16)	Yes
Does the induction plan include training on the teacher observation and evaluation model inclusive of the consistent use of quality teacher-specific data and building-level data within student performance measures? (24 P.S. § 11-1138.8 (c)(3) and 22 Pa Code, 49.16)	Yes
Does the induction plan:	Yes
a. Assess the needs of inductees?	
b. Describe how the program will be structured?	Yes
c. Describe what content will be included, along with the delivery format and timeframe?	Yes

Plan requirements

Yes/No

--

MENTORS

Which of the following characteristics does the Local Education Agency (LEA) use to select mentors?

Characteristics used by LEA	Yes/No
Pool of possible mentors is comprised of teachers with outstanding work performance.	Yes
Potential mentors have similar certifications and teaching assignments.	Yes
Potential mentors must model continuous learning and reflection.	Yes
Potential mentors must have knowledge of LEA policies, procedures, and resources.	Yes
Potential mentors must have demonstrated ability to work effectively with students and other adults.	Yes
Potential mentors must be willing to accept additional responsibility.	Yes
Mentors must complete mentor training or have previous related experience (e.g., purpose of induction program and role of mentor, communication and listening skills, coaching, and conferencing skills, problem-solving skills and knowledge of adult learning and development).	Yes
Mentors and inductees must have compatible schedules so that they can meet regularly.	Yes
Other, please specify below	No

OTHER

PLEASE EXPLAIN THE LEA’S PROCESS FOR ENSURING THEIR MENTORS HAVE THE ABOVE SELECTED

CHARACTERISTICS.

When selecting mentor's the district looks for mentors that are experienced within their area of certification and have demonstrated strong instructional practices during their time with the Fox Chapel Area School District.

NEEDS ASSESSMENT

Which of the following characteristics does the Local Education Agency (LEA) use to select mentors?

Characteristics used by LEA	Yes/No
Observations of inductee instructional practice by a coach or mentor to identify needs.	Yes
Multiple observations of inductee instructional practice by building supervisor to identify needs.	Yes
Regular scheduled meetings with mentors or coaches to reflect upon instructional practice to identify needs.	Yes
Standardized student assessment data	Yes
Classroom assessment data (Formative & Summative)	Yes
Inductee survey (local, intermediate units and national level)	Yes
Review of inductee lesson plans	Yes
Review of written reports summarizing instructional activity	Yes
Submission of Inductee Portfolio	Yes
Knowledge of successful research-based instructional models	Yes
Information collected from previous induction programs (e.g., program evaluations and second-year teacher interviews).	Yes
Other, please specify below	No

OTHER

BASED ON THE TOOLS AND METHODS SELECTED ABOVE, DESCRIBE THE LEA'S INDUCTION PROGRAM, INCLUDING THE FOLLOWING DETAILS:

- PROGRAM STRUCTURE**
- CONTENT INCLUDED**
- MEETING FREQUENCY**
- DELIVERY FORMAT**

Program Structure: The Fox Chapel Area School District (FCASD) designed the educator induction plan to help new staff members understand and fulfill their role in accomplishing the mission, goals, and objectives of the FCASD outlined in the district's strategic plan. The induction plan helps new staff members gain knowledge of its policies and procedures and develop an understanding of the district's beliefs and values. District mentors assist all new staff, providing individual support, resources and guidance throughout induction. The educator induction program is a two-year program that offers reflection and self-assessment through online, asynchronous activities, workshops and trainings, and mentor support. The program is differentiated by position (type, length of contract, etc.). Content Included: The program workshops support the district's mission and vision, empower teacher leadership, provide support and practical application, build capacity within the organization, and expand professional development offerings for all staff members. The content included is as follows: Differentiated Instruction Philosophy, Positive Learning Environment, Data to Instructional Response, Ongoing Assessment and Flexible Grouping, and Instructional Technology. Meeting Frequency: Professional development sessions, touch points, and support meetings occur on a quarterly basis. Delivery Format: Sessions are live via teacher professional development workshops. Inductees also have the opportunity to meet with their mentors on an on-going basis. Inductees also use the district induction portal to reflect on workshops and the Danielson Framework for teaching and learning.

EDUCATOR INDUCTION PLAN TOPIC AREAS

Ensure that professional development activities contain content that develops teacher competency, increases student learning, and aligns with at least one component contained in the Danielson Framework for Teaching.

CODE OF PROFESSIONAL PRACTICE AND CONDUCT FOR EDUCATORS

Selected Danielson Framework(s)	Timeline
4f: Showing Professionalism	Year 1 Spring, Year 3 Spring, Year 2 Fall, Year 2 Spring, Year 1 Fall, Year 3 Fall, Year 2 Winter, Year 1 Winter, Year 3 Winter

ASSESSMENTS AND PROGRESS MONITORING

Selected Danielson Framework(s)	Timeline
4b: Maintaining Accurate Records 1e: Designing Coherent Instruction	Year 1 Fall, Year 3 Fall, Year 1 Spring, Year 3 Spring, Year 2 Fall, Year 2 Spring, Year 2 Winter, Year 1 Winter, Year 3 Winter

INSTRUCTIONAL PRACTICES

Selected Danielson Framework(s)	Timeline
3c: Engaging Students in Learning	Year 1 Spring, Year 3 Spring, Year 1 Winter, Year 3 Winter, Year 1 Fall, Year 3 Fall, Year 2 Fall,
3e: Demonstrating Flexibility and Responsiveness	Year 2 Winter, Year 2 Spring
3a: Communicating with Students	
3b: Using Questioning and Discussion Techniques	
3d: Using Assessment in Instruction	

SAFE AND SUPPORTIVE SCHOOLS

Selected Danielson Framework(s)	Timeline
4e: Growing and Developing Professionally	Year 1 Winter, Year 1 Fall, Year 1 Spring, Year 3 Winter, Year 3 Fall, Year 2 Spring, Year 2 Fall,
1d: Demonstrating Knowledge of Resources	Year 2 Winter, Year 3 Spring

STANDARDS/CURRICULUM

Selected Danielson Framework(s)	Timeline
1e: Designing Coherent Instruction	Year 3 Winter, Year 3 Spring, Year 1 Spring, Year 3 Fall, Year 1 Fall, Year 2 Winter, Year 1 Winter,

Selected Danielson Framework(s)	Timeline
1d: Demonstrating Knowledge of Resources	Year 2 Spring, Year 2 Fall

TECHNOLOGY INSTRUCTION

Selected Danielson Framework(s)	Timeline
1d: Demonstrating Knowledge of Resources	Year 2 Winter, Year 2 Fall, Year 3 Spring, Year 1 Fall, Year 2 Spring, Year 1 Winter, Year 3 Fall, Year 1 Spring, Year 3 Winter

ACCOMMODATIONS AND ADAPTATIONS FOR DIVERSE LEARNERS

Selected Danielson Framework(s)	Timeline
1c: Setting Instructional Outcomes	Year 2 Fall, Year 1 Fall, Year 2 Winter, Year 1 Spring, Year 3 Fall, Year 1 Winter, Year 2 Spring,
3e: Demonstrating Flexibility and Responsiveness	Year 3 Winter, Year 3 Spring

DATA INFORMED DECISION MAKING

Selected Danielson Framework(s)	Timeline
3d: Using Assessment in Instruction	Year 1 Fall, Year 3 Fall, Year 1 Spring, Year 2 Spring, Year 2 Fall, Year 1 Winter,
1a: Demonstrating Knowledge of Content and Pedagogy	Year 3 Winter, Year 2 Winter
1d: Demonstrating Knowledge of Resources	

CLASSROOM AND STUDENT MANAGEMENT

Selected Danielson Framework(s)	Timeline
2c: Managing Classroom Procedures	Year 1 Spring, Year 2 Spring, Year 3 Spring, Year 1 Fall, Year 2 Fall, Year 3 Fall, Year 1 Winter,
1b: Demonstrating Knowledge of Students	Year 2 Winter, Year 3 Winter
2d: Managing Student Behavior	

PARENTAL AND/OR COMMUNITY INVOLVEMENT

Selected Danielson Framework(s)	Timeline
4c: Communicating with Families	Year 2 Winter, Year 1 Spring, Year 3 Winter, Year 3 Spring, Year 1 Fall, Year 2 Spring, Year 2 Fall,
	Year 1 Winter, Year 3 Fall

Selected Danielson Framework(s)	Timeline
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PROFESSIONAL ETHICS PROGRAM FRAMEWORK GUIDELINES

Selected Danielson Framework(s)	Timeline
4e: Growing and Developing Professionally 4f: Showing Professionalism	Year 2 Spring, Year 1 Spring, Year 3 Spring, Year 2 Fall, Year 1 Fall, Year 3 Fall, Year 2 Winter, Year 1 Winter, Year 3 Winter

CULTURALLY RELEVANT AND SUSTAINING EDUCATION PROGRAM FRAMEWORK GUIDELINES

Selected Danielson Framework(s)	Timeline
4e: Growing and Developing Professionally	Year 2 Winter, Year 1 Fall, Year 3 Fall, Year 1 Winter, Year 3 Winter, Year 2 Fall, Year 1 Spring, Year 3 Spring, Year 2 Spring

EDUCATOR EFFECTIVENESS

Selected Danielson Framework(s)	Timeline
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Selected Danielson Framework(s)	Timeline
4a: Reflecting on Teaching	Year 1 Fall, Year 2 Spring, Year 1 Winter, Year 3 Fall, Year 2 Fall, Year 2 Winter, Year 1 Spring, Year 3 Winter, Year 3 Spring

EVALUATION AND MONITORING

Describe the procedures employed to monitor and evaluate the Educator Induction Program. As part of this process LEAs should systematically collect data on the educator induction program design, implementation, and outcomes. This data may include:

- a. Survey of participants – new teachers, mentors, principals, and other members of the Educator Induction Program to determine levels of satisfaction and to understand the strengths and weakness of the program
- b. Analysis of activities and resources used in the program
- c. Aligned program evaluation instruments that provide quantitative and qualitative data (e.g., survey/questionnaires, individual and group interviews, and observation tools) to determine the impact of participating teachers and their students

EVALUATION AND MONITORING

The district utilizes Google Forms for survey and reflection for inductees on concepts related to the Danielson Framework and other competencies related to teaching and learning. The district also uses a evaluation form to monitor the effectiveness of the induction program and collects data to make adjustments annually.

DOCUMENTATION OF PARTICIPATION AND COMPLETION

Identify the methods used to record inductee participation and program completion.

Participation	Completion
Mentor documents his/her inductee's involvement in the program.	Yes
A designated administrator receives, evaluates, and archives all mentor records.	Yes
School/LEA maintains accurate records of program completion and provide a certificate or statement of completion to each inductee who has completed the program.	Yes
Completion is verified by the LEA Chief Administrator on the Application for Level 2 Certification.	Yes
Confirm that all first-year teachers are required to participate in the induction program.	Yes

IF “NO” IS SELECTED, PLEASE EXPLAIN WHAT INDIVIDUALS WERE NOT INCLUDED IN THE INDUCTION PROGRAM AND WHY.

EDUCATOR INDUCTION PLAN STATEMENT OF ASSURANCE

We affirm that this Educator Induction Plan has been developed in accordance with the laws, regulations and guidelines for the development, implementation and evaluation of the Induction Plan as designated in Chapter 4 of the Pennsylvania Department of Education School Code.

We affirm that this Educator Induction Plan focuses on the learning needs of each professional staff member to ensure high quality instruction for all students.

Educator Induction Plan Coordinator

Date

I affirm that this Induction Plan provides staff learning that improves the learning of all students as outlined in the [National Staff Development Council's Standards for Staff Learning](#).

Chief School Administrator

Date

FOX CHAPEL AREA SD

611 Field Club Rd

Professional Development Plan (Act 48) | 2023 - 2026

ACT 48

Chapter 4 establishes that each school entity shall submit to the Secretary for approval a professional education plan every 3 years as required under Chapter 49, Section 17(a). A school entity shall make its professional education plan available for public inspection and comment for a minimum of 28 days prior to approval of the plan by the school entity's governing board and submission of the plan to the Secretary.

Chapter 49.17, Continuing professional education, establishes that every school entity shall develop a continuing education plan that addresses the following requirements:

- a. Includes options for professional development including, but not limited to, activities such as: (i) graduate level coursework; (ii) obtaining a professionally related master's degree; (iii) department-approved in-service courses; (iv) curriculum development work; and (v) attendance at professional conferences.
- b. Defines terms used including, but not limited to, the following: (i) Professionally related graduate level coursework. (ii) Professionally related master's degree. (iii) Curriculum development work. (iv) Professional conferences.
- c. Developed as specified in section 1205.1 of the act in which the plan describes the persons who developed the plan and how the persons were selected.
- d. Submitted to the Secretary shall be approved by both the professional education committee and the board of the school entity.
- e. Includes a section which describes how the professional education needs of the school entity, including those of diverse learners, and its professional employees are to be met through implementation of the plan. The plan must describe how professional development activities will improve language and literacy acquisition for all students and contribute to closing achievement gaps among students.
- f. Includes a description of how the school entity will offer all professional employees opportunities to participate in continuing education focused on teaching diverse learners in inclusive settings.

- g. A school district that contracts with a community provider to operate a prekindergarten program shall address in the school district's professional education plan how the school district will offer professional education opportunities to teachers in the community provider's prekindergarten program.

LEA provided professional education meets the education needs of that school entity and its professional employees, so that they may meet the specific needs of students. Professional education for all levels of an LEA should be based on sound research and promising practices that promotes educators' skills over the long term.

Exemplary professional education for staff:

- Enhances the educator's content knowledge in the area of the educator's certification or assignment.
- Increases the educator's teaching skills based on research on effective practice, with attention given to interventions for struggling students.
- Provides educators with a variety of classroom-based assessment skills and the skills needed to analyze and use data in instructional decision-making.
- Empowers educators to work effectively with parents and community partners.

STEERING COMMITTEE

Name	Title	Committee Role	Appointed By
Matt Harris	Director of Secondary Education	Administrator	Administration Personnel
Ashley Constantine	Executive Director of Elementary Education	Administrator	Administration Personnel
Maisha Johnson	Parent	Parent of Child Attending	School Board of Directors
Zelha Tunc Pekkan	Parent	Parent of Child Attending	School Board of Directors
Jessica Haselkorn	Parent	Parent of Child Attending	School Board of Directors
Rachel Link	Community Member	Community Member	School Board of Directors
Vanessa Torres Lautenbach	Community Members	Community Member	School Board of Directors
Eric Hamilton	School Board Member	Other	School Board of Directors
Adam Goode	School Board Member	Other	School Board of Directors

DESCRIBE HOW MANY TIMES THE COMMITTEE MEETS IN A GIVEN YEAR, ANY SUBCOMMITTEES THAT ARE FORMED AND ANY OTHER RELEVANT INFORMATION REGARDING THE FUNCTION OF THE COMMITTEE.

The Learning and Teaching Committee met a total of 3 times during the 20223-2023 school year. In addition, the school board has and

academic committee that also oversees and meets on a monthly basis during the school year.

ACTION PLANS STEPS FROM COMPREHENSIVE PLAN

OTHER PROFESSIONAL DEVELOPMENT ACTIVITIES

SAFETY

Audience		Topics to be Included	Evidence of Learning
All Staff		Run, Hide, Fight; Evacuation and Reunification; Threat Assessment; Suicide Prevention; Bullying Prevention	All topics covered include assessments that participants must pass.
Lead Person/Position		Anticipated Timeline	
Matt Harris		08/21/2023 - 08/28/2023	

LEARNING FORMAT

Type of Activities	Frequency	Danielson Framework Component Met in this Plan	This Step Meets the Requirements of State Required Trainings
Other	This will be done annually		At Least 1-hour of Trauma-informed Care Training for All Staff

CULTURALLY RELEVANT AND SUSTAINING EDUCATION

Audience	Topics to be Included	Evidence of Learning
All Staff	Diversity, equity, inclusion, and belonging Issues related to student/staff diversity Identify behaviors that can discriminate or contribute to a hostile learning environment Exploring positive behaviors that show respect and appreciation	All topics covered include assessments that participants must pass.
Lead Person/Position		Anticipated Timeline
Matt Harris		08/25/2023 - 08/25/2023

LEARNING FORMAT

Type of Activities	Frequency	Danielson Framework Component Met in this Plan	This Step Meets the Requirements of State Required Trainings
Course(s)	Annually	2a: Creating an Environment of Respect and Rapport	Common Ground: Culturally Relevant Sustaining Education
Workshop(s)	Annually	2a: Creating an Environment of Respect and Rapport	Teaching Diverse Learners in Inclusive Settings

EDUCATOR ETHICS

Audience		Topics to be Included	Evidence of Learning
All Staff		Overview of ethical standards at work, including ethical behavior with monitoring practices. Ethical behavior with colleagues. Identifying guidelines for appropriate ethical behavior.	All topics covered include assessments that participants must pass.
Lead Person/Position		Anticipated Timeline	
Matt Harris		08/24/2023 - 10/28/2023	

LEARNING FORMAT

Type of Activities	Frequency	Danielson Framework Component Met in this Plan	This Step Meets the Requirements of State Required Trainings
Course(s)	Annually	4f: Showing Professionalism	Professional Ethics

TRAUMA INFORMED CARE

Audience		Topics to be Included	Evidence of Learning
All Staff		Trauma informed awareness and practices. - Recognizing the signs of trauma - Main sources of trauma - Categories of abusive behaviors - Effects of neglect - Trauma signs and symptoms - Strategies for helping students experiencing trauma	All topics covered include assessments that participants must pass.
Lead Person/Position		Anticipated Timeline	
Matt Harris		10/11/2023 - 10/11/2023	

LEARNING FORMAT

Type of Activities	Frequency	Danielson Framework Component Met in this Plan	This Step Meets the Requirements of State Required Trainings
Course(s)	Annually	2b: Establishing a Culture for Learning 1b: Demonstrating Knowledge of Students	At Least 1-hour of Trauma-informed Care Training for All Staff

STRUCTURED LITERACY

Audience	Topics to be Included	Evidence of Learning
Grades K-2 Grades 3-5 Ed Support and Reading Specialists K-5 (Can be included with the other 2 educator groups listed above or be trained in year 2 if there are other team priorities in year 1)	Structured Literacy Competencies (*PTA Refresh for K-2) Vocabulary Comprehension (Journeys)	Additional reteaching and walkthroughs focused on vocabulary, comprehension.

Lead Person/Position	Anticipated Timeline	
Dana Simile	08/29/2023 - 08/31/2026	

LEARNING FORMAT

Type of Activities	Frequency	This Step Meets the Requirements of State Required Trainings
Workshop(s)	Ongoing over the next 3 years	Structured Literacy

STRUCTURED LITERACY

Audience	Topics to be Included	Evidence of Learning
Grades K-2 Grades 3-5 Ed Support and Reading Specialists K-5 (Can be included with the other 2 educator groups listed above or be trained in year 2 if there are other team priorities in year 1)	Structured Literacy Competencies (*PTA Refresh for K-2) Vocabulary Comprehension (Journeys)	Additional reteaching and walkthroughs focused on vocabulary, comprehension.
Lead Person/Position	Anticipated Timeline	
Dana Simile	08/29/2023 - 08/31/2026	

LEARNING FORMAT

Type of Activities	Frequency	Danielson Framework Component Met in this Plan	This Step Meets the Requirements of State Required Trainings
Workshop(s)	Ongoing over the next 3 years	1a: Demonstrating Knowledge of Content and Pedagogy	Structured Literacy

PROFESSIONAL DEVELOPMENT PLAN ASSURANCES

Professional Education Plan Guidelines	Yes/No
Are the professional development activities aligned with the current and applicable Pennsylvania Core Standards or Pennsylvania Academic Standards? (22 Pa Code, Chapter 4)	Yes
Are the effectiveness of offerings evaluated through multiple measures of student achievement within the context of educator effectiveness to determine impact on student learning, educator effectiveness, and/or school performance? (Act 82 of 2012) aka (22 Pa Code, 19)	Yes
Are the professional development activities aligned to at least one component of one domain within the Observation and Practice Framework for Teaching?	Yes
Does the professional education plan contain a committee consisting of teacher representatives divided equally among elementary, middle and high school teachers chosen by the teachers, educational specialist representatives chosen by educational specialists and administrative representatives chosen by the administrative personnel? (Act 48, Section 1205.1)	Yes
Does the committee include parents of children attending a school in the district, local business representatives and other individuals representing the community appointed by the board of directors? (Act 48, Section 1205.1)	Yes
Was the professional education plan approved by the professional education committee and the board of the school entity? (22 pa Code, 49.16)	Yes
Does the professional development plan align with educator needs? (Act 48, Section 2)	Yes
Do the implementation steps cover at least a three-year implementation horizon?	Yes

Professional Education Plan Guidelines

Yes/No

Are the following professional development activities included in the Act 48 Professional Development Plan?

Language and Literacy Acquisition for All Students

Yes

Teaching Diverse Learners in Inclusive Settings

Yes

At least 1-hour of trauma-informed care training for all staff

Yes

Professional Ethics Program Framework Guidelines

Yes

Culturally Relevant and Sustaining Education Program Framework Guidelines

Yes

Structured Literacy Program Framework Guidelines

Yes

When is the first year the LEA will offer Structured Literacy Training to the staff?

2023-2024

Who will receive the Structured Literacy Training in addition to the five required certifications (early childhood, elementary-middle level, special education, ESL, and reading specialist)?

early childhood, elementary-middle level, special education, ESL, and reading specialist

Is the LEA using or planning to implement Structured Literacy (Select One)?

Hybrid, Structured Literacy components integrated into reading program.

EVALUATION AND REVIEW

DESCRIBE IN THE BOX BELOW THE PROCEDURES FOR EVALUATING AND REVIEWING THE PROFESSIONAL EDUCATION PLAN.

Survey Review Data Benchmarking Observation and Walkthrough review of artifacts interventions

PROFESSIONAL EDUCATION PLAN ASSURANCES

We affirm that this Professional Education Plan focuses on the learning needs of each staff member to ensure all staff members meet or exceed high academic standards in each of the core subject areas.

Professional Education Committee Chairperson:

Date

I affirm that this Professional Education Plan provides staff learning that improves the learning of all students as outlined in the National Staff Development Council's Standards for Staff Learning.

Superintendent or Chief Administrative Officer:

Date

FOX CHAPEL AREA SD

611 Field Club Rd

Student Services Assurances (Chapter 12) | 2023 - 2026

STUDENT SERVICES ASSURANCES (CHAPTER 12)

Chapter 12, Section 12.32, establishes the elements required in an LEA's Student and Student Services Plan. The plan for student records must conform with applicable State and Federal laws, regulations, and directives identified in guidelines issued by the Department.

PROFILE AND PLAN ESSENTIALS

Fox Chapel Area School District
103023912
611 Field Club Road , Pittsburgh, Pennsylvania 15238

Timothy Mahoney
timothy_mahoney@fcasd.edu
412-967-2435 Ext.

Mary Catherine Reljac
marycatherine_reljac@fcasd.edu

STUDENT SERVICES ASSURANCE

LEAs must indicate compliance to Chapter 12 regulations by ensuring the existence and implementation of the following LEA policies and procedures.

Safe Schools Programs, Strategies and Actions

In Compliance? Yes or No

Biennially Updated and Executed Memorandum of Understanding with Local Law Enforcement (24 P.S. § 13-1303-A1)

Yes

School-wide Positive Behavioral Programs

Yes

Bullying Prevention Program

Yes

Conflict Resolution or Dispute Management

Yes

Safe Schools Programs, Strategies and Actions	In Compliance? Yes or No
Peer Helper Programs	Yes
Safety and Violence Prevention Program	Yes
Comprehensive School Safety and Violence Prevention Plans (Article XIII-B of the School Code)	Yes
Purchase of Security-Related Technology	Yes
Student, Staff and Visitor Identification Systems	Yes
Placement of School Resource Officers	Yes
Counseling Services available for all Students	Yes
Internet Web-Based System for the Management of Student Discipline	Yes

LEAs must indicate compliance to Chapter 12 regulations by ensuring the existence and implementation of the following LEA policies and procedures.

Other Chapter 12 Requirements	In Compliance? Yes or No
Implementation of a comprehensive and integrated K-12 program of student services based on the needs of its students. (in compliance with § 12.41(a))	Yes
Free Education and Attendance (in compliance with § 12.1)	Yes
School Rules (in compliance with § 12.3)	Yes
Collection, maintenance and dissemination of student records (in compliance § 12.31(a) and § 12.32)	Yes
Discrimination (in compliance with § 12.4)	Yes
Corporal Punishment (in compliance with § 12.5)	Yes
Exclusion from School, Classes, Hearings (in compliance with § 12.6 , § 12.7 , § 12.8)	Yes
Freedom of Expression (in compliance with § 12.9)	Yes
Confidential Communications (in compliance with § 12.12)	Yes
Searches (in compliance with § 12.14)	Yes
Emergency Care and Administration of Medication and Treatment (in compliance with 35 P.S. § 780-101—780-144)	Yes

Other Chapter 12 Requirements**In Compliance? Yes or No**

Parents or guardians are informed regarding individual survey student assessments and provided a process for refusal to participate (consistent with § 445 of the General Education Provisions Act (20 U.S.C.A. § 1232h) and in compliance with § 12.41(d))	Yes
Persons delivering student services shall be specifically licensed or certified as required by statute or regulation (in compliance with § 12.41(e))	Yes
Development and Implementation of Local Wellness Program (in compliance with 42 USCS §1758b)	Yes
Establishment and Implementation of Student Assistance Programs at all of levels of the school system (§12.42)	Yes
Acceptable Use Policy for Technology Resources 24 P.S. § 4604	Yes

As Chief School Administrator, I affirm that this LEA complies with and has instituted local policies and procedures related to the requirements of Safe and Supportive Schools, as outlined in Chapter 12.

Superintendent/CEO Electronic Signature

Date

FOX CHAPEL AREA SD

611 Field Club Rd

Gifted Education Plan Assurances (Chapter 16) | 2023 - 2026

CHAPTER 16

Chapter 16 of the PA Code specifies how Pennsylvania will meet its obligations to suspected and identified gifted students who require gifted education to reach their potential. Gifted students are to be provided with quality gifted education services and programs. Requirements for Gifted Education Plans can be found in the Pennsylvania Code (22 Pa Code §16.32).

In accordance with 22 Pa. Code § 4.13(e) (relating to strategic plans) and 22 Pa. Code § 16.4, each school district shall develop and implement a gifted education plan every 6 years.

- a. The plan shall include the process for identifying children who are gifted and in need of specially designed instruction, as well as the gifted special education programs offered.
- b. The school districts shall make its gifted education plan available for public inspection and comment for a minimum of 28 days prior to approval of the plan by the school district's board of directors.
- c. Each school district shall provide, as the Department may require, reports of students, personnel and program elements, including the costs of the elements, which are relevant to the delivery of gifted education. (22 Pa. Code § 16.4)

1. Describe your district's public notice procedures conducted annually to inform the public of the gifted education services AND programs offered (newspaper, student handbooks, school website, etc.).
The Fox Chapel Area School District posts annual notices and develops annual awareness activities to inform the public of gifted education services and programs and the manner by which to request these services and programs. These awareness activities are designed to reach both parents of students enrolled in the public schools and the parents of school age children not enrolled in the public schools. Awareness activities are conducted annually and include providing information in local newspapers, In Fox Chapel Magazine, student handbooks and on the school district website. The Fox Chapel Area School District also collaborates with local parent groups (PAGE) to ensure that the public is fully informed of gifted education programs and services.
2. Describe your district's process for locating students who are thought to be gifted and may need specially designed instruction.
The Fox Chapel Area School District conducts monthly child find processes and designated universal screening for gifted education. This screening process includes review of classroom performance and identified need for enrichment or acceleration, universal screening through CogAT, benchmarking utilizing the STAR 360 assessment, teacher checklists, and review of student curricular portfolio.
3. Describe your district's procedures for determining ELIGIBILITY (through MULTIPLE CRITERIA) and NEED (based on ACADEMIC STRENGTH) for potentially mentally gifted students (EVALUATION).
The Fox Chapel Area School District determines eligibility and need through a Gifted Written Report (GWR). This report evaluates eligibility and need based on the following criteria: Information of the parent, student and other individuals who interact with the student on a regular basis; a nationally normed cognitive assessment; a nationally normed assessment of achievement; evaluation of rates of acquisition and retention; student portfolio evaluation of achievement, performance, or expertise in one or more academic areas; evaluation of learner strengths through a Gifted Evaluation Scale; evaluation of educational needs relative to suspected giftedness including differentiated instruction or acceleration; and the assessment of possible intervening factors which may mask giftedness.
4. Describe the gifted programs* that are offered to provide opportunities for acceleration, enrichment, or both. *The word "programs" refers to the CONTINUUM OF SERVICES, not one particular option.
The Fox Chapel Area School District provides a continuum of services to meet the needs of gifted learners. These services include but are not limited to regular enrichment, by module, within mathematics courses K-12 and enriched or advanced opportunities in English language arts K-12. Additionally, students are evaluated for opportunities to accelerate by course or through whole grade level acceleration based on

individual need. The Fox Chapel Area School District has also developed elementary Capstone Experiences in ELA, STEAM, and math. These capstones provide additional experiences for gifted learners that foster areas of student strengths and interests through rigorous, motivating, and meaningful learning experiences. At the secondary level, student focus is college and career oriented with career exploration through advising and exploration of academic endeavors and scholastic pursuits. Students are provided opportunities to enrich and accelerate across academic areas and through multiple AP and College in High School programs.

Chief School Administrator

Date

Fox Chapel Area School District

611 Field Club Road
Pittsburgh, PA 15238



Board Affirmation Statement

As required by the Pennsylvania Department of Education and State Board Regulations, the Board of Education for the **Fox Chapel Area School District** reviewed and approved the plan at the following Board Meeting, held on **October 9, 2023**. The plan was approved by a vote of _____ (yes) and _____ (no).

Plan(s) Approved at School Board Meeting:

Place a check in the box next to the board approved plan(s).



Comprehensive Plan

Board Affirmation also includes review and approval of the following state reports:

- Induction Plan (Chapter 49)
- Professional Development Plan (Act 48)
- Gifted Education Plan Assurances* (Chapter 16)

Affirmed on this 9th day of October, 2023

By: _____ (Signature of Board President)

_____ (Print Name)

Fox Chapel Area School District Board of Education

Fox Chapel Area School District

Agenda Study Session

October 2, 2023

Wesley Family Services – Agreement



**AGREEMENT BETWEEN
FOX CHAPEL AREA SCHOOL DISTRICT
AND
WESLEY FAMILY SERVICES**

THIS AGREEMENT is effective the **1st** day of **July 2023** between **Fox Chapel Area School District** (hereinafter "District") office at **611 Field Club Road, Pittsburgh, PA 15238**, and Wesley Family Services (hereinafter "WFS" and together, the "Parties") with corporate offices at 615 Alpha Drive, Pittsburgh, PA 15238.

RECITALS

WHEREAS, District has the authority to enter into agreements for the purpose of purchasing professional services; and

WHEREAS, WFS has the authority, according to the bylaws approved by the Board of Directors, to enter into agreements for the purpose of providing professional services consistent with the Mission of Wesley Family Services

WHEREAS, WFS has extensive experience and expertise in providing this professional service, and is in the business of providing such professional services, and is willing to provide the services described in the Scope of Services, Article I. in this Agreement; and

NOW THEREFORE, the parties intending to be legally bound do hereby mutually covenant, promise and agree as follows:

ARTICLE I. SCOPE OF SERVICES

1.1 Services Provided. WFS provides a wide variety of services to school districts and their students, including Child/Adolescent Partial Hospital services. As such, District desires to engage WFS for the following services, which shall be provided by WFS with sole and absolute discretion in the manner and means of carrying them out:

Child/Adolescent Partial Hospital Program (PHP): Intensive mental health and behavioral health services provided in the school setting will include Group Therapy, Individual Therapy, Family Therapy, Milieu Therapy, Classroom Behavioral Interventions and Psychiatric services such as evaluation and medication management. As a provider of PHP, WFS will abide by the Pennsylvania Chapter 5210 regulations.

1.2 Population Served. WFS will serve students referred by the District for treatment in the WFS PHP. Referred students must meet the medical necessity and other criteria of the PHP. Students attending the program may be covered through medical assistance (MA) or commercial insurance, in which case, WFS would bill the respective insurance. However, students need not have current insurance coverage to be served by the PHP as long as they meet the criteria of the program. Should a student not have active insurance coverage, has insurance coverage not accepted by WFS, or has insurance coverage that does not acknowledge the WFS PHP as a covered service, the District agrees to pay the hourly rate per student in effect at the time of the service for the duration of the service in which these circumstances prevail.

1.3 Student Records. All reports, records, or similar documentation regarding students prepared by WFS including psychotherapy notes or other clinical documentation prepared by WFS' therapist(s) shall remain and at all times be considered the property of WFS and WFS assumes all responsibility for the maintenance and storage of those records prepared in connection with the PHP services.

ARTICLE II. CONFLICT RESOLUTION

A "conflict" under Article II is hereby defined as any issue that arises relating to the quality of level of service provided hereunder, including but not limited to response time, but which falls short of constituting a material

breach of the Agreement. WFS and District agree to engage in conflict resolution activities that will minimize interference with service delivery.

- 2.1 The parties to this Agreement will have equal responsibility for the identification and resolution of conflicts that may arise in its implementation.
- 2.2 Conflict resolution will occur at the earliest opportunity and at the most appropriate administrative level.
- 2.3 Each party will notify the other party in writing and personally when a conflict exists, and a meeting to discuss and resolve the conflict will occur within five (5) working days of the written notification. Each party shall have a supervisory staff or upper level management present for such meeting.
- 2.4 The County Office of Behavioral Health can be consulted, as mutually agreed, to aide in resolution in the event that the parties fail to resolve any issue.

ARTICLE III. SERVICE AGREEMENT REVIEW

District and WFS agree to meet with appropriate personnel and review the terms of this agreement, at least semi-annually, to ensure that such terms are being met, recipients are being appropriately identified and planned for in a timely manner, and that problem resolution is occurring as needed.

ARTICLE IV. REMUNERATION

District shall pay WFS ~~\$36.25~~ per hour for six (6) hours per day for provision of services specified in Article I, Scope of Services **for students without active insurance coverage, including Medical Assistance, with insurance coverage not accepted by WFS, or with insurance coverage that does not recognize the WFS PHP as a covered service.** While provision is made for monthly invoicing and reimbursement based on hours of service rendered, WFS will not be reimbursed for any amount greater than ~~\$217.50~~ per day/per student in a twelve (12) month period from the start of the Agreement.

To the extent that WFS' expenses and costs in performing services under this agreement exceed the amount of fees WFS has received from District pursuant to this Agreement, such expenses and costs shall be borne by WFS.

WFS will submit a statement of the services provided, on a monthly basis, and within thirty (30) days of the last service in that calendar month. WFS will list the dates services were provided, the Service Dates, on the Statement along with the number of service hours provided.

Payments by the District will be made monthly unless otherwise arranged and added in writing as an amendment to the agreement and agreed to by both Parties.

ARTICLE V. TERM AND TERMINATION

- 6.1 Term. The term of this Agreement shall commence on **07/01/2023** and expire on **06/30/2024**.
- 6.2 Termination. Either party may terminate this Agreement without cause by giving the other party at least thirty (30) days advance written notice. In addition, either party may terminate this Agreement upon breach by the other party of any material provision of this Agreement, provided such breach continues for fifteen (15) days after receipt by the breaching party of written notice of such breach from the non-breaching party.
- 6.3 Effect of Termination. In the event of termination, upon the effective date of termination for this Agreement, neither party shall have any further rights or obligations hereunder except for those rights and obligations that survive termination of this agreement, such as compensation for services already provided, or arise as a result of any breach of this Agreement or related to indemnification.

ARTICLE VI. GENERAL PROVISIONS

- 7.1 Independent Status. It is acknowledged and agreed that the relationship created by this agreement is one of Independent contractor and not an employment relationship. WFS is responsible for the payment of all applicable expenses and taxes, including, but not limited to federal and state income taxes, FICA, FUTA, state unemployment compensation taxes and fees for workers' compensation coverage. Because WFS staff are not full-time or part-time employees of District, WFS acknowledges that WFS staff are not entitled to any benefits paid by District to its employees, including but not limited to, vacation pay, holiday pay, health insurance, unemployment compensation insurance and workers' compensation insurance.
- a. WFS shall have exclusive control over the details, manner and method by which it completes its duties under this Agreement.
 - b. As an independent contractor, WFS may, with the approval of the District, retain subcontractors to assist it in completing the services required of WFS pursuant to this Agreement. District is interested only in the result to be accomplished by WFS and shall have no right to control the manner or determine the method by which such services are provided.
 - c. Because WFS makes its services available to the general public, WFS is permitted to provide services to any number of other facilities or businesses unrelated to District.
 - d. WFS shall not have any authority to act on or on behalf of, or to bind District in any manner except as expressly authorized in writing in advance by District.
- 7.2 WFS Representations. WFS warrants and represents now and throughout the life of this Agreement, relative to the PHP, that:
- a. **Licensure:** WFS is duly authorized and licensed as a Provider of Partial Hospitalization Services by the Commonwealth of Pennsylvania. A copy of the license is available upon request.
 - b. **Special Training:** WFS maintains that specialized training in Child/Adolescent Therapy has been obtained and documentation of this is available upon request.
 - c. **Child Abuse/Criminal Background Checks:** WFS maintains that there have been no child abuse or child neglect charges made against any of the WFS staff and copies of child abuse, criminal background and FBI checks are on file in our Human Resources Department and will be made available upon request.
 - d. **Disbarment/Sanctions:** WFS maintains that WFS staff associated with this Agreement have not been disbarred in the Commonwealth of Pennsylvania or any other state. WFS maintains that the agency and its staff do not have any professional sanctions imposed upon them in the Commonwealth of Pennsylvania or any other state. Please see also Section 7.3: Exclusion Lists below.
 - e. **Insurance Coverage:** WFS will carry Professional Liability Insurance for the duration of this Agreement with not less than one million dollars (\$1,000,000) per occurrence and three million dollars (\$3,000,000) in aggregate annually.
 - f. **Accreditation:** WFS is currently accredited by the Council on Accreditation.
- 7.3 Exclusion Lists. WFS conducts a monthly review each month to confirm that no organization connected with WFS, nor any employee is excluded from participation in federal programs.

In the event that any organization or employee is found to be on any of the exclusion lists, WFS will notify District within 48 hours. The District reserves the right to terminate this agreement, without notice, upon any violation of the above requirements. The District has a duty to report all notification to the Pa Dept. of Public Welfare, Bureau of Program Integrity for any person/entity for employment or contracting excluded from federal health care programs or the Pennsylvania Medical Assistance Program.

- 7.4 Discrimination. WFS shall comply with all applicable rules and regulations with respect to prohibition against discrimination because of sex, handicap or disability, color, race, age, national origin and religious creed, as prohibited more specifically by inter alia Pennsylvania Human Relations Act, Title VI and VII of Civil rights Act of 1964, title IX of the Education Amendments of 1972, Americans with Disabilities Act (ADA) P.L. 101-336, Age Discrimination in Employment Act and Section 504 of the Rehabilitation Act of 1973. The District will also assure that they comply with the American's with Disabilities Act (ADA) P.L. 101-336 (if applicable), having removed barriers to access or made appropriate accommodations for consumers and staff as necessary.
- 7.5 Indemnification. Each Party (the "**Indemnifying Party**") shall defend, indemnify, and hold harmless the other Party (the "**Indemnified Party**") from any and all costs, damages, expenses, claims, liability, and/or losses of any nature, including attorneys' fees and costs, resulting from or arising out of (a) any negligence or misconduct on the part of the Indemnifying Party, its employees or agents, or (b) the breach of any representation, warranty, or obligation under this Agreement which is caused or occasioned by the acts of the Indemnifying Party, its employees or agents
- 7.6 Compliance with Law. Each party agrees to comply with all applicable local, state, and federal laws, rules, and regulations.
- 7.7 Confidentiality. WFS shall require agents, servants and employees to ensure that persons counseled, treated, rehabilitated or otherwise served are secure in the confidentiality of their records, names and identities except as law requires disclosure. WFS will follow all State and Federal law and regulations in regard to confidentiality.

The Parties acknowledge that each will have access to information that is treated as confidential and proprietary by the other including, without limitation, student charts and records, business plans, the names and addresses of present and past employees, the names and addresses of students and potential students, rate schedules, business strategies, service providers, computer programs, software, manuals, techniques, "know how", the existence and terms of this Agreement, and any information and/or materials relating to the operations of the Parties not known to the public domain; in each case whether spoken, written, printed, electronic, or in any other form or medium (collectively, the "**Confidential Information**"). Any Confidential Information accessed or developed in connection with the services provided in this Agreement, shall be subject to the terms and conditions of this clause. The Parties agree to treat all Confidential Information of the other Party as strictly confidential. The Party receiving Confidential Information (the "**Receiving Party**") agrees not to disclose the Confidential Information or permit it to be disclosed, in whole or part, to any third party without the prior written consent of the Party making the disclosure (the "**Disclosing Party**"). The Receiving Party shall notify the Disclosing Party immediately in the event it becomes aware of any loss or unauthorized disclosure of the Disclosing Party's Confidential Information.

Nothing herein shall be construed to prevent disclosure of Confidential Information as may be required by applicable law or regulation, or pursuant to the valid order of a court of competent jurisdiction or an authorized government agency, provided that the disclosure does not exceed the extent of disclosure required by such law, regulation, or order. The Receiving Party agrees to provide written notice of any such order to an authorized officer of the Disclosing Party within two (2) business days of receiving such order, but in any event sufficiently in advance of making any disclosure to permit the Disclosing Party to contest the order or seek confidentiality protections.

- 7.8 Health Insurance Portability and Accountability Act (HIPAA). Pursuant to Federal regulations promulgated under the authority of the Health Insurance Portability and Accountability Act of 1996, Standards for Privacy of Individually Identifiable Health Information, 42 C.F.R., Parts 160 and 164, District and WFS understand and agree that they and their Personnel will not use confidential client health information, which shall at all times include any and all forms of health care treatment, or billing information, including but not limited to client identity (hereinafter referred to as "**Protected Health Information**"), except as permitted by the regulations on Health Insurance Portability and Accountability Requirements. District and WFS agree that they will report any Breach, as defined by HIPAA/the Health Information Technology for Economic and Clinical Health Act (**HITECH**), of such Protected Health Information, to the other Party as soon as possible, but in no event more than three (3) business days after the Breach is discovered, as defined by HIPAA/HITECH.
- 7.9 Entire Agreement. This Agreement constitutes the entire agreement and supersedes any and all other agreements, either oral or in writing, between the parties to this Agreement with respect to the subject matter hereof, and no other agreement, statement or promise relating to the subject matter of this Agreement that is not contained or referenced herein shall be valid or binding.
- 7.10 Governing Law. This Agreement shall be governed by, construed, and enforced in accordance with applicable laws of the Commonwealth of Pennsylvania *without regard to any conflicts of the principles or provisions of laws*. Any action brought under this Agreement shall be brought in Pittsburgh, Pennsylvania.
- 7.11 Counterparts. This Agreement may be executed in one or more counterparts and by electronic or facsimile signature each of which shall be deemed an original and all of which together shall constitute only one Agreement.
- 7.12 Partial Invalidity. Should any provision of this Agreement be declared illegal or unenforceable by any court of competent jurisdiction and cannot be modified to be enforceable, such provision shall immediately become null and void, leaving the remainder of this agreement in full force and effect.
- 7.13 Non-Solicitation. WFS and its Personnel shall not use Protected Health Information or the identity of District's clients for solicitation, marketing, fundraising, or other purposes except as required to perform the Scope of Work at any time during the Agreement or following termination of this Agreement.
Neither Party shall, during this Agreement and for a period of one (1) year immediately following termination of this Agreement, either directly or indirectly recruit or induce, attempt to solicit or induce, or assist or encourage others to solicit or induce, hire, offer to hire, entice in any way or in any other manner persuade any employee or agent of the other Party (the "**Employer Party**"), or any individual who acted in such capacity for the Employer Party in the prior twelve (12) months, to terminate or modify his/her or its employment or other relationship or association with the Employer Party to the detriment of the Employer Party without the written consent of the Employer Party, such consent to be given or withheld in the Employer Party's sole discretion. For the purposes of this clause, a general advertisement or notice of a job listing or opening or other similar general publication of a job search or availability to fill employment positions, including on the internet, shall not be construed as a solicitation or inducement, and the hiring of any such employees or independent contractor who freely responds thereto shall not be a breach of this clause.
- 7.14 Notices. All notices, requests, consents, claims, demands, waivers, and other communications shall be in writing and addressed to the Parties at the addresses set forth below. All Notices shall be delivered by personal delivery, overnight courier, or certified or registered mail. Both Parties agree to keep each other current as to its business and mailing addresses, telephone numbers, email addresses and facsimile number.

If to District: Fox Chapel Area School District
611 Field Club Road
Pittsburgh, PA 15238
Attention: Dr. Timothy Mahoney, Director of Special Education
and Pupil Services

If to WFS: Wesley Family Services
615 Alpha Dr, Ste 250
Pittsburgh, PA 15238
Attention: Emily Pietrzak, VP of Finance & HR

or to such other persons or places as either party may from time to time designate by written notice to the other.

- 7.15 Waiver. A waiver by either party of a breach or failure to perform hereunder shall not constitute a waiver of any subsequent breach or failure.
- 7.16 Captions. The captions contained herein are used solely for convenience and shall not be deemed to define or limit the provisions of this Agreement.
- 7.17 Assignment; Binding Effect. Neither Party shall assign any rights, or delegate or subcontract any obligations, under this Agreement without the other Party's prior written consent, which shall not be unreasonably withheld. Any assignment in violation of the foregoing shall be deemed null and void. Notwithstanding the foregoing, WFS may assign its rights and obligations under this Agreement at any time to the successors and assigns of WFS (including without limitation: any entity owned by, controlling, controlled by, or under common control with WFS; or which may be the successor; or which may acquire all or substantially all of assets and business of WFS; or with or into which WFS may be merged or consolidated). Subject to the limits on assignment stated above, this Agreement will inure to the benefit of, be binding on, and be enforceable against each of the Parties hereto and their respective successors and assigns.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the day and year first written above.

Signatories:

For:
Wesley Family Services

For:
Fox Chapel Area School District

Signature

Name Amy Townsend
Title Director of Education and School Based
Behavioral Health

Signature

Name Marybeth Dadd
Title School Board President

Date

October 9, 2023

Date

Fox Chapel Area School District

Agenda Study Session

October 2, 2023

Hartwood Elementary School HVAC Project – Engineering Services Agreement

 AIA® Document B132™ – 2019**Standard Form of Agreement Between Owner and Architect, Construction Manager as Adviser Edition**

AGREEMENT made as of the Ninth day of October in the year Two Thousand Twenty-Three
(In words, indicate day, month, and year.)

BETWEEN the Engineer's client identified as the Owner:
(Name, legal status, address, and other information)

Fox Chapel Area School District
611 Field Club Road
Pittsburgh, PA 15238

and the Engineer:
(Name, legal status, address, and other information)

H. F. Lenz Company
1407 Scalp Avenue
Johnstown, PA 15904

for the following Project:
(Name, location, and detailed description)

HVAC Upgrades at Hartwood Elementary School
3730 Saxonburg Blvd.
Pittsburgh, PA 15238

The Construction Manager:
(Name, legal status, address, and other information)

Thomas & Williamson Program Management
3270 Babcock Blvd.
Pittsburgh, PA 15237

The Owner and Engineer agree as follows.

ADDITIONS AND DELETIONS:

The author of this document has added information needed for its completion. The author may also have revised the text of the original AIA standard form. An *Additions and Deletions Report* that notes added information as well as revisions to the standard form text is available from the author and should be reviewed. A vertical line in the left margin of this document indicates where the author has added necessary information and where the author has added to or deleted from the original AIA text.

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

This document is intended to be used in conjunction with AIA Documents A132™–2019, Standard Form of Agreement Between Owner and Contractor, Construction Manager as Adviser Edition; A232™–2019, General Conditions of the Contract for Construction, Construction Manager as Adviser Edition; and C132™–2019, Standard Form of Agreement Between Owner and Construction Manager as Adviser. AIA Document A232™–2019 is adopted in this document by reference. Do not use with other general conditions unless this document is modified.

Init.

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User Notes:

(1781484358)

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ARTICLE 1 INITIAL INFORMATION

§ 1.1 This Agreement is based on the Initial Information set forth in this Section 1.1.

(For each item in this section, insert the information or a statement such as "not applicable," or "unknown at time of execution".)

§ 1.1.1 The Owner's program for the Project:

(Insert the Owner's program, identify documentation that establishes the Owner's program, or state the manner in which the program will be developed.)

The baseline scope of work include replace the system as follows:

HVAC Work-

- 1) Replace all RTU's and curbs with VAV compatible packaged RTU's;
- 2) Replace all terminal equipment – provide VAV boxes (with re-heat coils);
- 3) Replace grilles, registers and diffusers;
- 4) Remove roof-routed hydronic piping, install new piping inside;
- 5) Replace multi-zone hot/cold deck and constant volume ductwork, replace with ductwork for a VAV system;
- 6) Replace all multi-zone ductwork;
- 7) Install new automatic temperature controls throughout;
- 8) Replace existing boiler plant with two (2) condensing boilers. Provide new piping, gas, pumps, tanks, make-up water and air, flues, fill station, VFD's, etc.;
- 9) Replace existing electric radiant heating with hot water fin tube;
- 10) Refurbish existing Science Room unit;

Electrical Work-

- 1) Provide power to all new equipment;
- 2) Replace all lighting with LED fixtures. These fixtures should be direct/indirect pendant-mount fixtures;
- 3) Replace all lighting switches with networkable occupancy sensors;

Init.

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User Notes:

(1781484358)

- 4) Fire alarm system modifications;
- 5) Temporarily support all systems cabling and devices for remounting in the new ceiling.

Plumbing Work-

- 1) Provide limited water, gas and condensate piping and connections.
- 2) Remove the existing abandoned water storage tanks.

General Work-

- 1) Ceiling replacement;
- 2) Drywall modifications;
- 3) Patch painting;
- 4) Roofing modifications in the flat roof area associated with the RTU replacement.
- 5) Structural modifications to facilitate the roof curb replacement.

Additionally, as listed above, the scope of work will include various related work necessary to gain access to the work areas and then to restore the effected finishes to a like-new condition following the MEP work. The District does not intend to perform a complete renovation of the interiors.

§ 1.1.2 The Project's physical characteristics:

(Identify or describe pertinent information about the Project's physical characteristics, such as size; location; dimensions; geotechnical reports; site boundaries; topographic surveys; traffic and utility studies; availability of public and private utilities and services; legal description of the site; etc.)

The original building was constructed in 1975 as Northwest Area Elementary School. The drawings for building alterations in 2004 indicate that only minimal changes have occurred since the original construction. The most significant change that was reported was that the original building HVAC system was "all-electric". It was subsequently converted to a hydronic system, using gas-fired boilers. The ductwork shop drawings from the original HVAC system installation indicate that fiberglass (ductboard) ductwork arranged to support an open concept floor plan was to be used for the air distribution.

The building was renovated and expanded in 2004. At that time, the HVAC system's multi-zone units were replaced. We are not certain to what extent the ductwork was modified during this project. It has also been reported by the Owner that the existing ductwork now may include interior-lined ductwork.

The existing building is mostly one (1) story with a small mezzanine area. The construction includes a steel structure, brick exterior walls and a slope metal roof. The highest region of the roof is flat with membrane roofing. The mechanical equipment is located there. The gross area of the building is 80,000 square feet.

§ 1.1.3 The Owner's budget for the Cost of the Work, as defined in Section 6.1:

(Provide total and, if known, a line item breakdown.)

Based on the limited information available, we estimate the hard cost of this work to be \$6.5 million. Our estimate summary is attached to the RFP.

§ 1.1.4 The Owner's anticipated design and construction milestone dates:

- .1 Design phase milestone dates, if any:

As illustrated in the figure below:

- .2 Construction commencement date:

December 2023

- .3 Substantial Completion date or dates:

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August 2024

.4 Other milestone dates:

N/A

§ 1.1.5 The Owner intends the following procurement method for the Project:
(Identify method such as competitive bid or negotiated contract.)

The contracting method will be multiple-prime, although alternative bidding provisions will also be included to allow combination of the prime packages. These alternates may be utilized in the event that bidders are unavailable to bid the smaller, general and plumbing prime contracts.

§ 1.1.6 The Owner's requirements for accelerated or fast-track design and construction, multiple bid packages, or phased construction are set forth below:
(Identify any requirements for fast-track scheduling or phased construction and, if applicable, list number and type of bid/procurement packages.)

None

§ 1.1.7 The Owner's anticipated Sustainable Objective for the Project:
(Identify and describe the Owner's Sustainable Objective for the Project, if any.)

TBD

§ 1.1.7.1 If the Owner identifies a Sustainable Objective, the Owner and Engineer shall complete and incorporate AIA Document E235-2019, Sustainable Projects Exhibit, Construction Manager as Adviser Edition, into this Agreement to define the terms, conditions and services related to the Owner's Sustainable Objective. If E235-2019 is incorporated into this Agreement, the Owner and Engineer shall incorporate the completed E235-2019 into the agreements with the consultants and contractors performing services or Work in any way associated with the Sustainable Objective.

§ 1.1.8 The Owner identifies the following representative in accordance with Section 5.4:
(List name, address, and other contact information.)

Mr. Daniel Breitreutz - Director of Ancillary Services
Fox Chapel Area School District
611 Field Club Road
Pittsburgh, PA 15238

§ 1.1.9 The persons or entities, in addition to the Owner's representative, who are required to review the Engineer's submittals to the Owner are as follows:
(List name, address, and other contact information.)

§ 1.1.10 The Owner shall retain the following consultants and Contractors:
(List name, legal status, address, and other contact information.)

.1 Construction Manager:

(The Construction Manager is identified on the cover page. If a Construction Manager has not been retained as of the date of this Agreement, state the anticipated date of retention. If the Engineer is to assist the Owner in selecting the Construction Manager, complete Section 4.1.1.1.)

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N/A

.2 Land Surveyor:

N/A

.3 Geotechnical Engineer:

N/A

.4 Civil Engineer:

N/A

.5 Other consultants and Contractors:
(List any other consultants and Contractors retained by the Owner.)

§ 1.1.11 The Engineer identifies the following representative in accordance with Section 2.4:
(List name, address, and other contact information.)

George A. McMillan IV, P.E.
H.F. Lenz Company
1407 Scalp Avenue
Johnstown, PA 15904

§ 1.1.12 The Engineer shall retain the consultants identified in Sections 1.1.12.1 and 1.1.12.2:
(List name, legal status, address, and other contact information.)

§ 1.1.12.1 Consultants retained under Basic Services:

.1 Structural Engineer:

N/A

.2 Mechanical Engineer:

N/A

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.3 Electrical Engineer:

N/A

§ 1.1.12.2 Consultants retained under Supplemental Services:

N/A

§ 1.1.13 Other Initial Information on which the Agreement is based:

N/A

§ 1.2 The Owner and Engineer may rely on the Initial Information. Both parties, however, recognize that the Initial Information may materially change and, in that event, the Owner and the Engineer shall appropriately adjust the Engineer's services, schedule for the Engineer's services, and the Engineer's compensation. The Owner shall adjust the Owner's budget for the Cost of the Work and the Owner's anticipated design and construction milestones, as necessary, to accommodate material changes in the Initial Information.

§ 1.3 The parties shall agree upon protocols governing the transmission and use of Instruments of Service or any other information or documentation in digital form. The parties will use AIA Document E203-2013, Building Information Modeling and Digital Data Exhibit, to establish the protocols for the development, use, transmission, and exchange of digital data.

§ 1.3.1 Any use of, or reliance on, all or a portion of a building information model without agreement to protocols governing the use of, and reliance on, the information contained in the model and without having those protocols set forth in AIA Document E203-2013, Building Information Modeling and Digital Data Exhibit, and the requisite AIA Document G202-2013, Project Building Information Modeling Protocol Form, shall be at the using or relying party's sole risk and without liability to the other party and its contractors or consultants, the authors of, or contributors to, the building information model, and each of their agents and employees.

§ 1.4 The term "Contractors" refers to persons or entities who perform Work under contracts with the Owner that are administered by the Engineer and Construction Manager. The term "Contractors" is used to refer to such persons or entities, whether singular or plural. The term does not include the Owner's own forces, or Separate Contractors, which are persons or entities who perform construction under separate contracts with the Owner not administered by the Engineer and Construction Manager.

ARTICLE 2 ENGINEER'S RESPONSIBILITIES

§ 2.1 The Engineer shall provide professional services as set forth in this Agreement. The Engineer represents that it is properly licensed in the jurisdiction where the Project is located to provide the services required by this Agreement, or shall cause such services to be performed by appropriately licensed design professionals.

§ 2.2 The Engineer shall perform its services consistent with the professional skill and care ordinarily provided by Engineers practicing in the same or similar locality under the same or similar circumstances. The Engineer shall perform its services as expeditiously as is consistent with such professional skill and care and the orderly progress of the Project.

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§ 2.3 The Owner's Engineer shall provide its services in conjunction with the services of a Program Manager as described in AIA Document C172 – 2014, Standard Form of Agreement Between Owner and Program Manager and the services of a Construction Manager as described in AIA Document C132™–2019, Standard Form of Agreement Between Owner and Construction Manager. The Owner's Engineer shall not be responsible for actions taken by the Program Manager or the Construction Manager.

§ 2.4 The Engineer shall identify a representative authorized to act on behalf of the Engineer with respect to the Project. The individual identified in §1.1.11 shall serve as the Owner's Engineer's authorized representative. The Owner's Engineer shall not change the authorized representative without prior written consent of the Owner and approval by the Owner of the replacement representative. Failure of the Owner's Engineer to adhere to this requirement shall be considered by the Owner as grounds for a termination of the Owner's Engineer for cause.

§ 2.5 Except with the Owner's knowledge and consent, the Engineer shall not engage in any activity, or accept any employment, interest or contribution that would reasonably appear to compromise the Engineer's professional judgment with respect to this Project.

§ 2.6 The Engineer shall maintain the following insurance until termination of this Agreement. If any of the requirements set forth below are in addition to the types and limits the Engineer normally maintains, the Owner shall pay the Engineer as set forth in Section 11.9.

§ 2.6.1 Commercial General Liability with policy limits of not less than One Million (\$ 1,000,000) for each occurrence and Two Million (\$ 2,000,000) in the aggregate for bodily injury and property damage.

§ 2.6.2 Automobile Liability covering vehicles owned, and non-owned vehicles used, by the Engineer with policy limits of not less than One Million (\$ 1,000,000) per accident for bodily injury, death of any person, and property damage arising out of the ownership, maintenance and use of those motor vehicles, along with any other statutorily required automobile coverage.

§ 2.6.3 The Engineer shall maintain umbrella or excess liability insurance with policy limits of not less than Two Million Dollars (\$2,000,000.00).

§ 2.6.4 Workers' Compensation at statutory limits.

§ 2.6.5 Employers' Liability with policy limits not less than One Hundred Thousand (\$ 100,000) each accident, One Hundred Thousand (\$ 100,000) each employee, and Five Hundred Thousand (\$ 500,000) policy limit.

§ 2.6.6 Professional Liability covering negligent acts, errors and omissions in the performance of professional services with policy limits of not less than One Million (\$ 1,000,000) per claim and One Million (\$ 1,000,000) in the aggregate.

§ 2.6.7 **Additional Insured Obligations.** To the fullest extent permitted by law, the Engineer shall cause the primary and excess or umbrella policies for Commercial General Liability and Automobile Liability to include the Owner as an additional insured for claims caused in whole or in part by the Engineer's negligent acts or omissions. The additional insured coverage shall be primary and non-contributory to any of the Owner's insurance policies and shall apply to both ongoing and completed operations.

(Paragraphs deleted)

§ 2.6.8 The Engineer shall provide, to the Owner, both policy endorsement(s) or riders and certificates of insurance evidencing compliance with the requirements in this Section 2.6 within ten (10) days of contract award.

ARTICLE 3 SCOPE OF ENGINEER'S BASIC SERVICES

§ 3.1 The Engineer's Basic Services consist of those described in Article 3 and as set forth in the document attached hereto as Exhibit A, Engineer/CM/Owner Responsibility Matrix and include usual and customary structural, mechanical, and electrical engineering services.

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§ 3.1.1 The Engineer shall coordinate its services with those services provided by the Owner, the Construction Manager, and the Owner's other consultants. The Engineer shall consult with the Owner and the Construction Manager, research applicable design criteria, attend plan review and progress Project meetings during preconstruction, and weekly progress meetings from construction through Project completion. The Engineer shall attend and participate in meetings called by the Owner's Facilities Committee and School Board meetings when requested. If other or additional meetings become necessary at any time as a result of the Project requirements or schedule, the Owner and Engineer will mutually agree upon a schedule of these additional meetings as part of basic services. The Engineer shall, communicate regularly with members of the Project team and report progress to the Owner at the Owner's request and otherwise, on a weekly basis.

§ 3.1.2 The Engineer shall coordinate its services with those services provided by the Owner, the Construction Manager and the Owner's other consultants. The Engineer shall be entitled to rely on the accuracy and completeness of services and information furnished by the Owner, the Construction Manager, and the Owner's other consultants. The Engineer shall provide prompt written notice to the Owner if the Engineer becomes aware of any error, omission or inconsistency in such services or information.

§ 3.1.3 As soon as practicable after the date of this Agreement, the Engineer shall submit, for the Construction Manager's review and the Owner's approval, a schedule for the performance of the Engineer's services. The schedule shall include design phase milestone dates, as well as the anticipated dates for the commencement of construction and for Substantial Completion of the Work as set forth in the Initial Information. This schedule shall include allowances for periods of time required for the Owner's review, for the Construction Manager's review, for the performance of the Owner's consultants, and for approval of submissions by authorities having jurisdiction over the Project. Once approved by the Owner, time limits established by the schedule shall not, except for reasonable cause, be exceeded by the Engineer or Owner. With the Owner's approval, the Engineer shall adjust the schedule, if necessary, as the Project proceeds until the commencement of construction.

§ 3.1.4 The Engineer shall submit information to the Construction Manager and participate in developing and revising the Project schedule as it relates to the Engineer's services. The Engineer shall review and approve, or take other appropriate action upon, the portion of the Project schedule relating to the performance of the Engineer's services.

§ 3.1.5 The Engineer shall not be responsible for an Owner's or Construction Manager's directive or substitution, or for the Owner's acceptance of non-conforming Work, made or given without the Engineer's written approval.

§ 3.1.6 The Engineer shall, in coordination with the Construction Manager, contact governmental authorities required to approve the Construction Documents and entities providing utility services to the Project. The Engineer shall respond to applicable design requirements imposed by those authorities and entities.

§ 3.1.7 The Engineer shall assist the Owner and Construction Manager in connection with the Owner's responsibility for filing documents required for the approval of governmental authorities having jurisdiction over the Project.

§ 3.1.9 The Engineer shall investigate existing conditions of facilities.

§ 3.1.10 The Engineer shall review estimates of Construction Costs prepared by the Construction Manager and render an opinion in writing on the probable cost.

§ 3.1.11 The Engineer shall attend the final walk-through with the Contractors, receive and distribute operation and maintenance manuals and attend system testing and personnel training when requested. Additionally, the Engineer shall have a member of his Engineering team attend the final walk through. This shall not be construed as work involving Commissioning, which is not a part of this contract.

§ 3.2 Schematic Design Phase Services

§ 3.2.1 The Engineer, in conjunction with the Construction Manager, shall review the program, schedule and budget for the cost of the work furnished by the Owner and Construction Manager, and shall review laws, codes, and regulations applicable to the Engineer's services.

§ 3.2.2 The Engineer shall prepare a preliminary evaluation of the Owner's program, schedule, budget for the Cost of the Work, Project site, and the proposed procurement or delivery method and other Initial Information, each in terms of the other, to ascertain the requirements of the Project. The Engineer shall notify the Owner of (1) any inconsistencies discovered in the information, and (2) other information or consulting services that may be reasonably needed for the Project.

§ 3.2.3 The Engineer shall present its preliminary evaluation to the Owner and Construction Manager and shall discuss with the Owner and Construction Manager alternative approaches to design and construction of the Project, including the feasibility of incorporating environmentally responsible design approaches. The Engineer shall reach an understanding with the Owner regarding the requirements of the Project.

§ 3.2.4 Based on the Project requirements agreed upon with the Owner, the Engineer shall prepare and present to the Owner and Construction Manager, for the Owner's approval, a preliminary design illustrating the scale and relationship of the Project components.

§ 3.2.5 Based on the Owner's approval of the preliminary design, the Engineer shall prepare Schematic Design Documents for the Owner's approval and the Construction Manager's review. The Schematic Design Documents shall consist of drawings and other documents including a site plan, if appropriate, and preliminary building plans, sections and elevations; and may include some combination of study models, perspective sketches, or digital modeling. Preliminary selections of major building systems and construction materials shall be noted on the drawings or described in writing.

§ 3.2.5.1 The Engineer shall consider environmentally responsible design alternatives, such as material choices and building orientation, together with other considerations based on program and aesthetics, in developing a design that is consistent with the Owner's program, schedule and budget for the Cost of the Work. The Owner may obtain other environmentally responsible design services under Article 4.

§ 3.2.5.2 The Engineer shall consider with the Owner and the Construction Manager the value of alternative materials, building systems and equipment, together with other considerations based on program and aesthetics in developing a design for the Project that is consistent with the Owner's schedule and budget for the Cost of the Work.

§ 3.2.6 The Engineer shall submit the Schematic Design Documents to the Owner and the Construction Manager. The Engineer shall meet with the Construction Manager to review the Schematic Design Documents.

§3.2.6.1 In the further development of the drawings and specifications during this phase of design, the Engineer shall review and submit to the Owner an Estimate of the Cost of the Work based on current area, for the benefit of the Owner. As the Engineer progresses with the preparation of the Schematic, Design Development and Construction Documents, the Engineer shall update the estimates of the Cost of the Work and submit them to the Owner in advance of the Owner's meetings of its Board of School Directors. The estimated cost of each portion of the Work shall be indicated with supporting detail. The Engineer's estimates of the Cost of the Work shall be provided for the Construction Manager's review and the Owner's approval. The Construction Manager shall review and comment upon the Engineer's estimate. The Engineer's estimate represents the Engineer's judgment as a design professional and it is recognized that neither the Engineer nor the Owner has control over the cost of labor, materials or equipment; the Contractor's methods of determining bid prices; or competitive bidding, market or negotiating conditions. Accordingly, the Engineer cannot and does not warrant that the construction bids will not vary from the Engineer's estimates or the Owner's budget for the Cost of the Work.

§ 3.2.7 Upon receipt of the Construction Manager's review comments and cost estimate at the conclusion of the Schematic Design Phase, the Engineer shall take action as required under Section 6.4, identify agreed upon adjustments to the Project's size, quality or budget, and request the Owner's approval of the Schematic Design Documents. If revisions to the Schematic Design Documents are required to comply with the Owner's budget for the Cost of the Work at the conclusion of the Schematic Design Phase, the Engineer shall incorporate the required revisions in the Design Development Phase.

§ 3.2.8 In the further development of the Drawings and Specifications during this and subsequent phases of design, the Engineer shall prepare estimates of Construction Cost. Should the Engineer's cost estimates differ substantially from those of the Construction Manager, the Engineer shall endeavor to resolve the difference with the Construction

Manager. In such event, where the difference is not resolved, the Engineer shall proceed with the design using the Construction Manager's estimated Construction Cost and make necessary changes to the design to result in the estimate maintaining compliance with the Budget.

§ 3.3 Design Development Phase Services

§ 3.3.1 Based on the Owner's approval of the Schematic Design Documents, and on the Owner's authorization of any adjustments in the Project requirements and the budget for the Cost of the Work, the Engineer shall prepare Design Development Documents for the Construction Manager's review and the Owner's approval. The Design Development Documents shall be based upon information provided, and estimates prepared by, the Construction Manager and shall illustrate and describe the development of the approved Schematic Design Documents and shall consist of drawings and other documents including plans, sections, elevations, typical construction details, and diagrammatic layouts of building systems to fix and describe the size and character of the Project as to architectural, structural, mechanical and electrical systems, and other appropriate elements. The Design Development Documents shall also include outline specifications that identify major materials and systems and establish in general their quality levels.

§ 3.3.2 Prior to the conclusion of the Design Development Phase, the Engineer shall submit the Design Development Documents to the Owner and the Construction Manager. The Engineer shall meet with the Construction Manager to review the Design Development Documents.

§ 3.3.3 Upon receipt of the Construction Manager's information and estimate at the conclusion of the Design Development Phase, the Engineer shall take action as required under Sections 6.5 and 6.6 and request the Owner's approval of the Design Development Documents.

§3.3.4 The Engineer shall advise the Owner and the Construction Manager of any design changes which would affect the Schematic Design Estimate of Construction Cost.

§3.3.5 Uncovering the Design Work

§3.3.5.1 From time to time throughout the Project, the Owner, Construction Manager and the various Authorities Having Jurisdiction will review the design of the project. Where, in the course of these reviews, the Owner and Construction Manager have reasonable cause or belief that the Engineer's Standard of Care is not being met on the Project, the Owner, may, without invalidating this Agreement, or assuming the obligations of the Engineer, reserve the right to engage a third-party review of the Design Work in order to verify that the Standard of Care is being met.

§3.3.5.2 Should the Owner's third-party review disclose that the matter is not in conformance with the Engineer's Standard of Care, the Engineer and its consultants shall incorporate the recommended changes into the Contract Documents at no additional cost to the Owner.

§3.3.5.3 Should the Engineer or its consultants reject the recommendations from the third-party reviewer and the matter is later determined to be out of compliance with the Engineer's standard of Care, or otherwise sub-standard or inadequately designed, the Engineer, shall, at its expense, be responsible for all costs to correct the Design, including, but not limited to, the costs for the third-party review as well as all costs required to correct the construction resulting from the sub-standard design.

§ 3.4 Construction Documents Phase Services

§ 3.4.1 Based on the Owner's approval of the Design Development Documents, and on the Owner's authorization of any adjustments in the Project requirements and the budget for the Cost of the Work, the Engineer shall prepare Construction Documents for the Construction Manager's review and the Owner's approval. The Construction Documents shall illustrate and describe the further development of the approved Design Development Documents and shall consist of Drawings and Specifications setting forth in detail the quality levels and performance criteria of materials and systems and other requirements for the construction of the Work. The Owner and Engineer acknowledge that, in order to perform the Work, the Contractor will provide additional information, including Shop Drawings, Product Data, Samples and other similar submittals, which the Engineer shall review in accordance with Section 3.6.4.

§ 3.4.2 The Engineer shall incorporate the design requirements of governmental authorities having jurisdiction over the Project into the Construction Documents.

§ 3.4.2.1 The Engineer shall incorporate the information prepared by the Construction Manager regarding Bidding Requirements, General and Supplemental Conditions to the Contract, Bid Packaging including the Work defined in the Summary of the Project and General Requirements defined in Division One Specifications into the design and Construction Documents, making sure that all are in compliance with the design requirements of governmental authorities having jurisdiction over the Project.

§ 3.4.3 During the development of the Construction Documents, if requested by the Owner, the Engineer shall assist the Owner and the Construction Manager in the development and preparation of (1) procurement information that describes the time, place, and conditions of bidding, including bidding or proposal forms; (2) the form of agreements between the Owner and Contractors; and (3) the Conditions of the Contracts for Construction (General, Supplementary and other Conditions); and (4) a project manual that includes the Conditions of the Contracts for Construction and Specifications, and may include bidding requirements and sample forms.

§ 3.4.4 Prior to the conclusion of the Construction Documents Phase, the Engineer shall submit the Construction Documents to the Owner and the Construction Manager. The Engineer shall meet with the Construction Manager to review the Construction Documents.

§ 3.4.5 Upon receipt of the Construction Manager's information and an estimate at the conclusion of the Construction Documents Phase, the Engineer shall take action as required under Section 6.7, and request the Owner's approval of the Construction Documents.

§ 3.4.6 The Engineer shall assist the Owner, other design professional retained by the Owner and Construction Manager in connection with the Owner's responsibility for filing documents required for the approval of governmental authorities having jurisdiction over the Project, including, but not limited to, submissions required by the PA Department of Education and local jurisdictions having authority for preliminary code reviews, planning approval process, zoning hearings, if applicable and permitting process.

§ 3.5 Procurement Phase Services

§ 3.5.1 General

The Engineer shall assist the Owner and Construction Manager in establishing a list of prospective contractors. Following the Owner's approval of the Construction Documents, the Engineer shall assist the Owner and Construction Manager in (1) obtaining either competitive bids or negotiated proposals; (2) confirming responsiveness of bids or proposals; (3) determining the successful bid or proposal, if any; and (4) awarding and preparing Contracts for Construction.

§ 3.5.2 Competitive Bidding

§ 3.5.2.1 Bidding Documents shall consist of bidding requirements and proposed Contract Documents.

§ 3.5.2.2 The Engineer shall assist the Owner and Construction Manager in bidding the Project by

- .1 facilitating the distribution of Bidding Documents to prospective bidders;
- .2 organizing and conducting a pre-bid conference for prospective bidders;
- .3 preparing responses to questions from prospective bidders and providing clarifications and interpretations of the Bidding Documents to the prospective bidders in the form of addenda; and
- .4 organizing and conducting the opening of bids, and subsequently documenting and distributing the bidding results, as directed by the Owner.

§ 3.5.2.3 If the Bidding Documents permit substitutions, upon the Owner's written authorization, the Engineer shall, as an Additional Service, consider requests for substitutions, and prepare and distribute addenda identifying approved substitutions to all prospective bidders.

§ 3.5.3 Negotiated Proposals-Intentionally Deleted.

(Paragraphs deleted)

§ 3.6 Construction Phase Services

§ 3.6.1 General

§ 3.6.1.1 The Engineer shall provide administration of the Contract between the Owner and the Contractor as set forth below and in AIA Document A232™-2019, General Conditions of the Contract for Construction, Construction

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Manager as Adviser Edition. If the Owner and Contractor modify AIA Document A232–2019, those modifications shall not affect the Engineer’s services under this Agreement unless the Owner and the Engineer amend this Agreement.

§ 3.6.1.2 The Engineer shall advise and consult with the Owner and Construction Manager during the Construction Phase Services. The Engineer shall have authority to act on behalf of the Owner only to the extent provided in this Agreement. The Engineer shall not have control over or charge of and shall not be responsible for construction means, methods, techniques, sequences or procedures, or for safety precautions and programs in connection with the Work, since these are the Contractors’ responsibility under the Contracts for Construction. The Engineer shall not be responsible for the Contractors’ schedules or failure to carry out the Work in accordance with the Contract Documents. The Engineer shall not be responsible for the performance by the Construction Manager of the services required by the Construction Manager’s agreement with the Owner. The Engineer shall not have control over or charge of acts or omissions of the Contractors, Subcontractors, or their agents or employees, or of any other persons performing services or portions of the Work, but shall be responsible for its own intentional and/or negligent acts or omissions. The Engineer shall not accept work not in conformance with the Contract Documents, unless by mutual agreement with the Owner and Construction Manager, and if applicable, an acceptable adjustment in the Contract Sum is submitted by the Contractor.

§ 3.6.1.3 Subject to Section 4.2, and except as provided in Section 3.6.6.5, the Engineer’s responsibility to provide Construction Phase Services commences with the award of the initial Contract for Construction and terminates 60 days after the date the Engineer issues the final Certificate for Payment.

§ 3.6.1.4 The Engineer shall visit the site at intervals appropriate to the stage of construction and at a minimum to attend weekly Project Progress Meetings for the duration of the Project to become generally familiar with the progress and quality of the Work completed and to determine in general if the Work is being performed in a manner indicating that the Work when completed will be in accordance with the Contract Documents. However, the Engineer shall not be required to make exhaustive or continuous on-site inspections to check the quality or quantity of the Work. On the basis of on-site observations as the Engineer, the Engineer shall keep the Owner and Construction Manager informed of the progress and quality of the Work and shall endeavor to guard the Owner against defects and deficiencies in the Work. Engineer shall consult with the Construction Manager and provide to the Construction Manager information necessary to assist the Construction Manager in preparing its report to the Owner on known deviations from the most recent construction schedule. The Engineer shall visit the site from construction through Project completion, at a minimum, once per week. the Engineer shall be required to visit the site more frequently as a part of Basic Services only to the extent required to address issues related to the resolving questions or concerns that arise as a result of inadequacies, errors and/or omissions in the Construction Documents prepared by the Engineer.

§ 3.6.1.5 Based on the Engineer’s observations and evaluations of each Contractor’s Application for Payment, the Engineer and Construction Manager shall review and certify the amounts due the respective Contractors.

§ 3.6.1.6 Warranty Close-Out Assistance

The Engineer, together with the Construction Manager, shall assist the Owner in verifying that the contractors have fulfilled their respective warranty obligations. Immediately prior to the expiration of the Project Warranty periods, the Engineer shall review the condition of the work and, after consultation with the Construction Manager, shall report any observed deficiencies, which constitute a breach of the Contractors’ warranty obligations, to the Owner, prior to the expiration of the Project Warranty periods.

§ 3.6.2 Evaluations of the Work

§ 3.6.2.1 The Engineer shall visit the site at intervals appropriate to the stage of construction, or as otherwise required in Section 4.2.3, to become generally familiar with the progress and quality of the portion of the Work completed, and to determine, in general, if the Work observed is being performed in a manner indicating that the Work, when fully completed, will be in accordance with the Contract Documents. However, the Engineer shall not be required to make exhaustive or continuous on-site inspections to check the quality or quantity of the Work. On the basis of the site visits, the Engineer shall keep the Owner reasonably informed about the progress and quality of the portion of the Work completed, and promptly report to the Owner and the Construction Manager (1) known deviations from the Contract Documents, (2) known deviations from the most recent construction schedule submitted by the Construction Manager, and (3) defects and deficiencies observed in the Work.

§ 3.6.2.2 The Engineer has the authority to reject Work that does not conform to the Contract Documents and shall notify the Construction Manager about the rejection. Whenever the Engineer considers it necessary or advisable, the Engineer, upon written authorization from the Owner and notification to the Construction Manager, shall have the authority to require inspection or testing of the Work in accordance with the provisions of the Contract Documents, whether or not the Work is fabricated, installed or completed. However, neither this authority of the Engineer nor a decision made in good faith either to exercise or not to exercise such authority shall give rise to a duty or responsibility of the Engineer to the Contractors, Subcontractors, suppliers, their agents or employees, or other persons or entities performing portions of the Work.

§ 3.6.2.3 The Engineer shall interpret and decide matters concerning performance under, and requirements of, the Contract Documents on written request of the Construction Manager, Owner, or Contractors through the Construction Manager. The Engineer's response to such requests shall be made in writing within any time limits agreed upon or otherwise with reasonable promptness.

§ 3.6.2.4 Interpretations and decisions of the Engineer shall be consistent with the intent of, and reasonably inferable from, the Contract Documents and shall be in writing or in the form of drawings. When making such interpretations and decisions, the Engineer shall endeavor to secure faithful performance by the Owner and Contractors, shall not show partiality to either, and shall not be liable for results of interpretations or decisions rendered in good faith. The Engineer's decisions on matters relating to aesthetic effect shall be final if consistent with the intent expressed in the Contract Documents.

§ 3.6.2.5 Unless the Owner and Contractors designate another person to serve as an Initial Decision Maker, as that term is defined in AIA Document A232–2019, the Engineer, with the assistance of the Construction Manager, shall render initial decisions on Claims between the Owner and Contractors as provided in the Contract Documents.

§3.6.2.6 The Engineer shall render written decisions within a reasonable time on all claims, disputes or other matters in question between the Owner and Contractors relating to the execution or progress of the Work as provided in the Contract Documents.

§3.6.2.7 The Engineer's decisions on claims, disputes or other matters, including those in questions between the Owner and Contractors, except for those relating to aesthetic effect, shall be subject mediation as a condition precedent to litigation as provided in this Agreement and in the Contract Documents.

§ 3.6.3 Certificates for Payment to Contractor

§ 3.6.3.1 Not more frequently than monthly, the Engineer shall review and certify an application for payment. Within seven days after the Engineer receives an application for payment forwarded from the Construction Manager, the Engineer shall review and certify the application as follows:

- 1** Where there is only one Contractor responsible for performing the Work, the Engineer shall review the Contractor's Application and Certificate for Payment that the Construction Manager has previously reviewed and certified. The Engineer shall certify the amount due the Contractor and shall issue a Certificate for Payment in such amount.
- 2** Where there is more than one Contractor responsible for performing different portions of the Project, the Engineer shall review the Project Application and Project Certificate for Payment, with the Summary of Contractors' Applications for Payment, that the Construction Manager has previously prepared, reviewed, and certified. The Engineer shall certify the total amount due all Contractors collectively and shall issue a Project Certificate for Payment in the total of such amounts.

§ 3.6.3.2 The Engineer's certification for payment shall constitute a representation to the Owner, based on (1) the Engineer's evaluation of the Work as provided in Section 3.6.2, (2) the data comprising the Contractor's Application for Payment or the data comprising the Project Application for Payment, and (3) the recommendation of the Construction Manager, that, to the best of the Engineer's knowledge, information and belief, the Work has progressed to the point indicated, the quality of the Work is in accordance with the Contract Documents, and that the Contractors are entitled to payment in the amount certified. The foregoing representations are subject to (1) an evaluation of the Work for conformance with the Contract Documents upon Substantial Completion, (2) results of subsequent tests and inspections, (3) correction of minor deviations from the Contract Documents prior to completion, and (4) specific qualifications expressed by the Engineer.

§ 3.6.3.3 The issuance of a Certificate for Payment or a Project Certificate for Payment shall not be a representation that the Engineer has (1) made exhaustive or continuous on-site inspections to check the quality or quantity of the Work, (2) reviewed construction means, methods, techniques, sequences or procedures, (3) reviewed copies of requisitions received from Subcontractors and suppliers and other data requested by the Owner to substantiate each Contractor's right to payment, or (4) ascertained how or for what purpose that Contractor has used money previously paid on account of the Contract Sum.

§ 3.6.3.4 The Engineer shall maintain a record of the Applications and Certificates for Payment.

§ 3.6.4 Submittals

§ 3.6.4.1 The Engineer shall review the Construction Manager's Project submittal schedule and shall not unreasonably delay or withhold approval of the schedule. The Engineer's action in reviewing submittals transmitted by the Construction Manager shall be taken in accordance with the approved submittal schedule or, in the absence of an approved submittal schedule, with reasonable promptness while allowing sufficient time, in the Engineer's professional judgment, to permit adequate review.

§ 3.6.4.2 The Engineer shall review and approve, or take other appropriate action upon, the Contractors' submittals such as Shop Drawings, Product Data and Samples, that the Construction Manager has reviewed, recommended for approval, and transmitted to the Engineer. The Engineer's review of the submittals shall only be for the limited purpose of checking for conformance with information given and the design concept expressed in the Contract Documents. Review of such submittals is not for the purpose of determining the accuracy and completeness of other information such as dimensions, quantities, and installation or performance of equipment or systems, which are the Contractors' responsibilities. The Engineer's review shall not constitute approval of safety precautions or construction means, methods, techniques, sequences or procedures. The Engineer's approval of a specific item shall not indicate approval of an assembly of which the item is a component.

§ 3.6.4.3 If the Contract Documents specifically require the Contractors to provide professional design services or certifications by a design professional related to systems, materials or equipment, the Engineer shall specify the appropriate performance and design criteria that such services must satisfy. The Engineer shall review and take appropriate action on Shop Drawings and other submittals related to the Work designed or certified by the Contractors' design professionals, provided the submittals bear such professionals' seal and signature when submitted to the Engineer. The Engineer's review shall be for the limited purpose of checking for conformance with information given and the design concept expressed in the Contract Documents. The Engineer shall be entitled to rely upon, and shall not be responsible for, the adequacy and accuracy of the services, certifications, and approvals performed or provided by such design professionals.

§ 3.6.4.4 After receipt of the Construction Manager's recommendations, and subject to the provisions of Section 4.2, the Engineer shall review and respond to requests for information about the Contract Documents. The Engineer, in consultation with the Construction Manager, shall set forth in the Contract Documents the requirements for requests for information. Requests for information shall include, at a minimum, a detailed written statement that indicates the specific Drawings or Specifications in need of clarification and the nature of the clarification requested. The Engineer's response to such requests shall be made in writing within any time limits agreed upon, or otherwise with reasonable promptness. If appropriate, the Engineer shall prepare and issue supplemental Drawings and Specifications in response to the requests for information.

§ 3.6.4.5 The Engineer shall maintain a record of submittals and copies of submittals transmitted by the Construction Manager in accordance with the requirements of the Contract Documents.

§ 3.6.5 Changes in the Work

§ 3.6.5.1 The Engineer shall review and sign, or take other appropriate action, on Change Orders and Construction Change Directives prepared by the Construction Manager for the Owner's approval and execution in accordance with the Contract Documents.

§ 3.6.5.2 The Engineer may order minor changes in the Work that are consistent with the intent of the Contract Documents and do not involve an adjustment in the Contract Sum or an extension of the Contract Time. Such changes shall be effected by written order issued by the Engineer through the Construction Manager.

§ 3.6.5.3 The Engineer shall maintain records relative to changes in the Work.

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§ 3.6.6 Project Completion

§ 3.6.6.1 The Engineer, assisted by the Construction Manager, shall:

- .1 conduct inspections to determine the date of Substantial Completion and the date of final completion;
- .2 issue a Certificate of Substantial Completion prepared by the Construction Manager;
- .3 review written warranties and related documents required by the Contract Documents and received from the Contractors, through the Construction Manager; and
- .4 after receipt of a final Contractor's Application and Certificate for Payment or a final Project Application and Project Certificate for Payment from the Construction Manager, issue a final Certificate for Payment based upon a final inspection indicating that, to the best of the Engineer's knowledge, information, and belief, the Work complies with the requirements of the Contract Documents.

§ 3.6.6.2 The Engineer's inspections shall be conducted with the Owner and Construction Manager to (1) check conformance of the Work with the requirements of the Contract Documents and (2) verify the accuracy and completeness of the lists submitted by the Construction Manager and Contractors of Work to be completed or corrected.

§ 3.6.6.3 When Substantial Completion has been achieved, the Engineer shall inform the Owner about the balance of the Contract Sum remaining to be paid each of the Contractors, including the amount to be retained from the Contract Sum, if any, for final completion or correction of the Work.

§ 3.6.6.4 The Engineer shall forward to the Owner the following information received from the Contractors, through the Construction Manager: (1) consent of surety or sureties, if any, to reduction in or partial release of retainage or the making of final payment; (2) affidavits, receipts, releases and waivers of liens, or bonds indemnifying the Owner against liens; and (3) any other documentation required of the Contractors under the Contract Documents.

§ 3.6.6.5 Upon request of the Owner, and prior to the expiration of one year from the date of Substantial Completion, the Engineer shall, without additional compensation, conduct a meeting with the Owner and Construction Manager to review the facility operations and performance.

ARTICLE 4 SUPPLEMENTAL AND ADDITIONAL SERVICES

§ 4.1 Supplemental Services

§ 4.1.1 The services listed below are not included in Basic Services but may be required for the Project. The Engineer shall provide the listed Supplemental Services only if specifically designated in the table below as the Engineer's responsibility, and the Owner shall compensate the Engineer as provided in Section 11.2. Unless otherwise specifically addressed in this Agreement, if neither the Owner nor the Engineer is designated, the parties agree that the listed Supplemental Service is not being provided for the Project.

(Designate the Engineer's Supplemental Services and the Owner's Supplemental Services required for the Project by indicating whether the Engineer or Owner shall be responsible for providing the identified Supplemental Service. Insert a description of the Supplemental Services in Section 4.1.2 below or attach the description of services as an exhibit to this Agreement.)

Supplemental Services	Responsibility (Engineer, Owner or Not Provided)
§ 4.1.1.1 Assistance with selection of Construction Manager	Not Provided
§ 4.1.1.2 Programming	Not Provided
§ 4.1.1.3 Multiple preliminary designs	Not Provided
§ 4.1.1.4 Measured drawings	Not Provided
§ 4.1.1.5 Existing facilities surveys	Not Provided
§ 4.1.1.6 Site evaluation and planning	Not Provided
§ 4.1.1.7 Building Information Model management responsibilities	Not Provided
§ 4.1.1.8 Development of Building Information Models for post construction use	Not Provided
§ 4.1.1.9 Civil engineering	Not Provided

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§ 4.1.1.10	Landscape design	Not Provided
§ 4.1.1.11	Architectural interior design	Not Provided
§ 4.1.1.12	Value analysis	Not Provided
§ 4.1.1.13	Cost estimating	Not Provided
§ 4.1.1.14	On-site project representation	Not Provided
§ 4.1.1.15	Conformed documents for construction	Not Provided
§ 4.1.1.16	As-designed record drawings	Not Provided
§ 4.1.1.17	As-constructed record drawings	Not Provided
§ 4.1.1.18	Post-occupancy evaluation	Not Provided
§ 4.1.1.19	Facility support services	Not Provided
§ 4.1.1.20	Tenant-related services	Not Provided
§ 4.1.1.21	Engineer's coordination of the Owner's consultants	Not Provided
§ 4.1.1.22	Telecommunications/data design	Not Provided
§ 4.1.1.23	Security evaluation and planning	Not Provided
§ 4.1.1.24	Commissioning	By Owner's CM through Substantial Completion
§ 4.1.1.25	Sustainable Project Services pursuant to Section 4.1.3	TBA
§ 4.1.1.26	Historic preservation	Not Provided
§ 4.1.1.27	Furniture, furnishings, and equipment design	Not Provided
§ 4.1.1.28	Other services provided by specialty Consultants	Not Provided
§ 4.1.1.29	Other Supplemental Services	Not Provided

§ 4.1.2 Description of Supplemental Services

§ 4.1.2.1 A description of each Supplemental Service identified in Section 4.1.1 as the Engineer's responsibility is provided below.

(Describe in detail the Engineer's Supplemental Services identified in Section 4.1.1 or, if set forth in an exhibit, identify the exhibit. The AIA publishes a number of Standard Form of Engineer's Services documents that can be included as an exhibit to describe the Engineer's Supplemental Services.)

§ 4.1.2.2 A description of each Supplemental Service identified in Section 4.1.1 as the Owner's responsibility is provided below.

(Describe in detail the Owner's Supplemental Services identified in Section 4.1.1 or, if set forth in an exhibit, identify the exhibit.)

§ 4.1.3 If the Owner identified a Sustainable Objective in Article 1, the Engineer shall provide, as a Supplemental Service, the Sustainability Services required in AIA Document E235™–2019, Sustainable Projects Exhibit, Construction Manager as Adviser Edition, attached to this Agreement. The Owner shall compensate the Engineer as provided in Section 11.2.

§ 4.2 Engineer's Additional Services

The Engineer may provide Additional Services after execution of this Agreement, without invalidating the Agreement. Except for services required due to the fault of the Engineer, any Additional Services provided in accordance with this Section 4.2 shall entitle the Engineer to compensation pursuant to Section 11.3 and an appropriate adjustment in the Engineer's schedule.

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§ 4.2.1 Upon recognizing the need to perform the following Additional Services, the Engineer shall notify the Owner with reasonable promptness and explain the facts and circumstances giving rise to the need. The Engineer shall not proceed to provide the following Additional Services until the Engineer receives the Owner's written authorization:

- .1 Services necessitated by a change in the Initial Information, previous instructions or recommendations given by the Construction Manager or the Owner, approvals given by the Owner, or a material change in the Project including size, quality, complexity, building systems, the Owner's schedule or budget for Cost of the Work, constructability considerations, procurement or delivery method, or bid packages in addition to those listed in Section 1.1.6;
- .2 Making revisions in Drawings, Specifications, or other documents (as required pursuant to Section 6.7), when such revisions are required because the Construction Manager's estimate of the Cost of the Work exceeds the Owner's budget, except where such excess is due to changes initiated by the Engineer in scope, capacities of basic systems, or the kinds and quality of materials, finishes or equipment;
- .3 Services necessitated by enactment or revision of codes, laws, or regulations, including changing or editing previously prepared Instruments of Service;
- .4 Changing or editing previously prepared Instruments of Service necessitated by official interpretations of applicable codes, laws or regulations that are either (a) contrary to specific interpretations by the applicable authorities having jurisdiction made prior to the issuance of the building permit, or (b) contrary to requirements of the Instruments of Service when those Instruments of Service were prepared in accordance with the applicable standard of care;
- .5 Services necessitated by decisions of the Owner or Construction Manager not rendered in a timely manner or any other failure of performance on the part of the Owner, Construction Manager or the Owner's other consultants or contractors;
- .6 Preparing digital models or other design documentation for transmission to the Owner's consultants and contractors, or to other Owner-authorized recipients;
- .7 Preparation of design and documentation for alternate bid or proposal requests proposed by the Owner or Construction Manager;
- .8 Preparation for, and attendance at, a public presentation, meeting or hearing;
- .9 Preparation for, and attendance at, a dispute resolution proceeding or legal proceeding, except where the Engineer is party thereto;
- .10 Evaluation of the qualifications of entities providing bids or proposals;
- .11 Consultation concerning replacement of Work resulting from fire or other cause during construction; or
- .12 Assistance to the Initial Decision Maker, if other than the Engineer.

§ 4.2.2 To avoid delay in the Construction Phase, the Engineer shall provide the following Additional Services, notify the Owner with reasonable promptness, and explain the facts and circumstances giving rise to the need. If, upon receipt of the Engineer's notice, the Owner determines that all or parts of the services are not required, the Owner shall give prompt written notice to the Engineer of the Owner's determination. The Owner shall compensate the Engineer for the services provided prior to the Engineer's receipt of the Owner's notice:

- .1 Reviewing a Contractor's submittal out of sequence from the Project submittal schedule approved by the Engineer;
- .2 Responding to the Contractors' requests for information that are not prepared in accordance with the Contract Documents or where such information is available to the Contractors from a careful study and comparison of the Contract Documents, field conditions, other Owner-provided information, Contractor-prepared coordination drawings, or prior Project correspondence or documentation;
- .3 Preparing Change Orders, and Construction Change Directives that require evaluation of Contractors' proposals and supporting data, or the preparation or revision of Instruments of Service;
- .4 Evaluating an extensive number of Claims as the Initial Decision Maker; or
- .5 Evaluating substitutions proposed by the Owner, Construction Manager or Contractors and making subsequent revisions to Instruments of Service resulting therefrom.

§ 4.2.3

(Paragraphs deleted)

Revisions of Drawings, Specifications and other documents required because initial bids exceed the Project Budget by more than 10% are Basic Services, not Additional Services and the Engineer will receive no additional compensation from the Owner for such services. The Estimate of Construction Cost shall be mutually established by the

Construction Manager, reviewed and approved by the Owner before commencement of the Schematic Design Phase and shall only be increased upon agreement of the parties.

§ 4.2.4 Except for services required under Section 3.6.6.5 and those services that do not exceed the limits set forth in Section 4.2.3, Construction Phase Services provided more than 60 days after (1) the date of Substantial Completion of the Work, or (2) the anticipated date of Substantial Completion identified in the Initial Information, whichever is earlier, shall be compensated as Additional Services to the extent the Engineer incurs additional cost in providing those Construction Phase Services.

§ 4.2.5 If the services covered by this Agreement have not been completed within Eleven (11) months of the date of this Agreement, through no fault of the Engineer, extension of the Engineer's services beyond that time shall be compensated as Additional Services.

§ 4.3 Additional Services may be provided after execution of this Agreement upon written request of the Owner, without invalidating the Agreement. Except for services required due to the fault of the Engineer, any Additional Services provided in accordance with this Section 4.3 shall entitle the Engineer to compensation pursuant to Section 11.3 and an appropriate adjustment in the Engineer's schedule.

§ 4.3.1 Upon recognizing the need to perform the following Additional Services, the Engineer shall notify the Owner in writing with reasonable promptness and explain the facts and circumstances giving rise to the need. The Engineer shall not proceed to provide the following services until the Engineer receives the Owner's written authorization:

- .1 Services necessitated by a substantial change in the Initial Information, previous instructions or recommendations given by the Construction Manager or the Owner, or approvals given by the Owner, or a material change in the Project including, but not limited to, size, quality, complexity, building systems, the Owner's schedule or budget for Cost of the Work, constructability considerations, procurement or delivery method, or bid packages in addition to those listed in Section 1.1.6;

ARTICLE 5 OWNER'S RESPONSIBILITIES

§ 5.1 Unless otherwise provided for under this Agreement, the Owner shall provide information in a timely manner regarding requirements for and limitations on the Project, including a written program which shall set forth the Owner's objectives, schedule, constraints and criteria, including space requirements and relationships, flexibility, expandability, special equipment, systems and site requirements.

§ 5.2 The Owner shall retain a Construction Manager to provide services, duties and responsibilities as described in AIA Document C132-2019, Standard Form of Agreement Between Owner and Construction Manager as Adviser. The Owner shall provide the Engineer with a copy of the scope of services in the agreement executed between the Owner and the Construction Manager, and any subsequent modifications to the Construction Manager's scope of services in the agreement.

§ 5.3 The Owner shall establish and periodically update the Owner's budget for the Project, including (1) the budget for the Cost of the Work as defined in Section 6.1, (2) the Owner's other costs, and (3) reasonable contingencies related to all of these costs. The Owner shall furnish the services of a Construction Manager that shall be responsible for preparing all estimates of the Cost of the Work, review and commenting upon all estimates of the Cost of the Work prepared by the Owner's Engineer and for value engineering. If the Owner significantly increases or decreases the Owner's budget for the Cost of the Work, the Owner shall notify the Owner's Engineer and the Construction Manager. The Owner and the Owner's Engineer, in consultation with the Construction Manager, shall thereafter agree to a corresponding change in the budget for the Cost of the Work or in the Project's scope and quality.

(Paragraph deleted)

§ 5.4 The Owner shall identify a representative authorized to act on the Owner's behalf with respect to the Project. The Owner shall render decisions and approve the Engineer's submittals in a timely manner in order to avoid unreasonable delay in the orderly and sequential progress of the Engineer's services.

§ 5.5 The Owner shall furnish surveys to describe physical characteristics, legal limitations and utility locations for the site of the Project, and a written legal description of the site. The surveys and legal information shall include, as applicable, grades and lines of streets, alleys, pavements and adjoining property and structures; designated wetlands; adjacent drainage; rights-of-way, restrictions, easements, encroachments, zoning, deed restrictions, boundaries and

contours of the site; locations, dimensions, and other necessary data with respect to existing buildings, other improvements and trees; and information concerning available utility services and lines, both public and private, above and below grade, including inverts and depths. All the information on the survey shall be referenced to a Project benchmark.

§ 5.6 The Owner shall furnish services of geotechnical engineers, which may include test borings, test pits, determinations of soil bearing values, percolation tests, evaluations of hazardous materials, seismic evaluation, ground corrosion tests and resistivity tests, including necessary operations for anticipating subsoil conditions, with written reports and appropriate recommendations.

§ 5.7 The Owner shall provide the Supplemental Services designated as the Owner's responsibility in Section 4.1.1.

§ 5.8 If the Owner identified a Sustainable Objective in Article 1, the Owner shall fulfill its responsibilities as required in AIA Document E235™-2019, Sustainable Projects Exhibit, Construction Manager as Adviser Edition, attached to this Agreement.

§ 5.9 The Owner shall coordinate the services of its own consultants with those services provided by the Engineer. Upon the Engineer's request, the Owner shall furnish copies of the scope of services in the contracts between the Owner and the Owner's consultants. The Owner shall furnish the services of consultants other than those designated as the responsibility of the Engineer in this Agreement, or authorize the Engineer to furnish them as an Additional Service, when the Engineer requests such services and demonstrates that they are reasonably required by the scope of the Project. The Owner shall require that its consultants and contractors maintain insurance, including professional liability insurance, as appropriate to the services or work provided.

§ 5.10 The Owner shall furnish tests, inspections and reports required by law or the Contract Documents, such as structural, mechanical, and chemical tests, tests for air and water pollution, and tests for hazardous materials.

§ 5.11 The Owner shall furnish all legal, insurance and accounting services, including auditing services, that may be reasonably necessary at any time for the Project to meet the Owner's needs and interests.

§ 5.12 The Owner shall provide prompt written notice to the Engineer and Construction Manager if the Owner becomes aware of any fault or defect in the Project, including errors, omissions or inconsistencies in the Engineer's Instruments of Service.

§ 5.13 The Owner shall communicate with the Contractors and the Construction Manager's consultants through the Construction Manager about matters arising out of or relating to the Contract Documents. The Owner and Construction Manager shall include the Engineer in all communications that relate to or affect the Engineer's services or professional responsibilities. The Owner shall promptly notify the Engineer of the substance of any direct communications between the Owner and the Construction Manager otherwise relating to the Project. Communications by and with the Engineer's consultants shall be through the Engineer.

§ 5.14 Before executing the Contracts for Construction, the Owner shall coordinate the Engineer's duties and responsibilities set forth in the Contracts for Construction with the Engineer's services set forth in this Agreement. The Owner shall provide the Engineer a copy of the executed agreements between the Owner and Contractors, including the General Conditions of the Contracts for Construction.

§ 5.15 The Owner shall provide the Engineer access to the Project site prior to commencement of the Work and shall obligate the Construction Manager and Contractors to provide the Engineer access to the Work wherever it is in preparation or progress.

(Paragraph deleted)

ARTICLE 6 COST OF THE WORK

§ 6.1 For purposes of this Agreement, the Cost of the Work shall be the total cost to the Owner to construct all elements of the Project designed or specified by the Engineer and shall include the Contractors' general conditions costs, overhead and profit. The Cost of the Work does not include the compensation of the Engineer, Construction

Manager, and any agent, servant, or employee of the Engineer or Construction Manager, the costs of the land, rights-of-way, financing, contingencies for changes in the Work or other costs that are the responsibility of the Owner.

§ 6.2 The Owner's budget for the Cost of the Work is provided in Initial Information and shall be adjusted throughout the Project as required under Sections 5.3 and 6.4. Evaluations of the Owner's budget for the Cost of the Work represent the Engineer's judgment as a design professional.

§ 6.3 The Owner shall require the Construction Manager to include appropriate contingencies for design, bidding or negotiating, price escalation, and market conditions in estimates of the Cost of the Work. The Engineer shall be entitled to rely on the accuracy and completeness of estimates of the Cost of the Work the Construction Manager prepares as the Engineer progresses with its Basic Services. The Engineer shall prepare, as an Additional Service, revisions to the Drawings, Specifications or other documents required due to the Construction Manager's inaccuracies or incompleteness in preparing cost estimates, or due to market conditions the Engineer could not reasonably anticipate. The Engineer may review the Construction Manager's estimates solely for the Engineer's guidance in completion of its services, however, the Engineer shall report to the Owner any material inaccuracies and inconsistencies noted during any such review.

§ 6.3.1 If the Engineer is providing cost estimating services as a Supplemental Service, and a discrepancy exists between the Construction Manager's cost estimates and the Engineer's cost estimates, the Engineer and the Construction Manager shall work together to reconcile the cost estimates.

§ 6.4 If, prior to the conclusion of the Design Development Phase, the Construction Manager's estimate of the Cost of the Work exceeds the Owner's budget for the Cost of the Work, the Engineer, in consultation with the Construction Manager, shall make appropriate recommendations to the Owner to adjust the Project's size, quality or budget for the Cost of the Work, and the Owner shall cooperate with the Engineer in making such adjustments.

§ 6.5 If the Construction Manager's estimate of the Cost of the Work at the conclusion of the Design Development Phase exceeds the Owner's budget for the Cost of the Work, the Owner shall

- .1 give written approval of an increase in the budget for the Cost of the Work;
- .2 terminate in accordance with Section 9.5;
- .3 in consultation with the Engineer and Construction Manager, revise the Project program, scope, or quality as required to reduce the Cost of the Work; or
- .4 implement any other mutually acceptable alternative.

§ 6.6 If the Owner chooses to proceed under Section 6.5.3, the Engineer, without additional compensation, shall incorporate the revisions in the Construction Documents Phase as necessary to comply with the Owner's budget for the Cost of the Work at the conclusion of the Design Development Phase Services, or the budget as adjusted under Section 6.5.1. The Engineer's revisions in the Construction Documents Phase shall be the limit of the Engineer's responsibility under this Article 6.

§ 6.7 After incorporation of modifications under Section 6.6, the Engineer shall, as an Additional Service, make any required revisions to the Drawings, Specifications or other documents necessitated by subsequent cost estimates that exceed the Owner's budget for the Cost of the Work, except when the excess is due to changes initiated by the Engineer in scope, basic systems, or the kinds and quality of materials, finishes or equipment.

ARTICLE 7 COPYRIGHTS AND LICENSES

§ 7.1 The Engineer and the Owner warrant that in transmitting Instruments of Service, or any other information, the transmitting party is the copyright owner of such information or has permission from the copyright owner to transmit such information for its use on the Project. If the Owner and Engineer intend to transmit Instruments of Service or any other information or documentation in digital form, they shall endeavor to establish necessary protocols governing such transmissions.

§ 7.2 The Engineer and the Engineer's consultants shall be deemed the authors and owners of their respective Instruments of Service, including the Drawings and Specifications, and shall retain all common law, statutory and other reserved rights, including copyrights. Submission or distribution of Instruments of Service to meet official regulatory requirements or for similar purposes in connection with the Project is not to be construed as publication in derogation of the reserved rights of the Engineer and the Engineer's consultants.

§ 7.3 The Engineer grants to the Owner a nonexclusive license to use the Engineer's Instruments of Service solely and exclusively for purposes of constructing, using, maintaining, altering and adding to the Project, provided that the Owner substantially performs its obligations under this Agreement, including prompt payment of all sums due pursuant to Article 9 and Article 11. The Engineer shall obtain similar nonexclusive licenses from the Engineer's consultants consistent with this Agreement. The license granted under this section permits the Owner to authorize the Contractors, Construction Manager, Subcontractors, Sub-subcontractors, and suppliers, as well as the Owner's consultants and Separate Contractors, to reproduce applicable portions of the Instruments of Service, subject to any protocols established pursuant to Section 1.3, solely and exclusively for use in performing services or construction for the Project.

§ 7.3.1 In the event the Owner uses the Instruments of Service without retaining the authors of the Instruments of Service, the Owner releases the Engineer and Engineer's consultant(s) from all claims and causes of action arising from such uses. The Owner, to the extent permitted by law, further agrees to indemnify and hold harmless the Engineer and its consultants from all costs and expenses, including the cost of defense, related to claims and causes of action asserted by any third person or entity to the extent such costs and expenses arise solely from the Owner's use of the Instruments of Service under this Section 7.3.1. The terms of this Section 7.3.1 shall not apply if the Owner rightfully terminates this Agreement for cause under Section 9.4.

§ 7.4 Except for the licenses granted in this Article 7, no other license or right shall be deemed granted or implied under this Agreement. The Owner shall not assign, delegate, sublicense, pledge or otherwise transfer any license granted herein to another party without the prior written agreement of the Engineer. Any unauthorized use of the Instruments of Service shall be at the Owner's sole risk and without liability to the Engineer and the Engineer's consultants.

§ 7.5 Except as otherwise stated in Section 7.3, the provisions of this Article 7 shall survive the termination of this Agreement.

§ 7.6 Subsequent to receipt of bids, Engineer agrees to make available to the lowest responsible bidder with a responsive bid under each prime contract a complete "build to" set of drawings and specifications as part of the Engineer's Basic Services hereunder.

§ 7.7 At Project Close Out, Engineer agrees to compile all contractor redlined drawings into a complete set of "Record" drawings and forward them to the Owner as part of the Engineer's Basic Services hereunder.

ARTICLE 8 CLAIMS AND DISPUTES

§ 8.1 General

§ 8.1.1 The Owner and Engineer shall commence all claims and causes of action, whether in contract, tort or otherwise, against the other arising out of or related to this Agreement in accordance with the laws of the Commonwealth of Pennsylvania, in the Court of Common Pleas of Allegheny County within the period specified by applicable law.

§ 8.1.2 To the extent damages are covered by property insurance, the Owner and Engineer waive all rights against each other and against the contractors, consultants, agents and employees of the other for damages, except such rights as they may have to the proceeds of such insurance as set forth in AIA Document A232-2009, General Conditions of the Contract for Construction. The Owner or the Engineer, as appropriate, shall require of the Construction Manager, contractors, consultants, agents and employees of any of them similar waivers in favor of the other parties enumerated herein.

§ 8.1.3 The Engineer shall defend, indemnify and hold the Owner and the Owner's officers, administrators, Directors and employees harmless from and against damages, losses and judgments arising from claims by third parties, including reasonable attorneys' fees and expenses recoverable under applicable law, but only to the extent they are caused by the negligent or otherwise wrongful errors, acts or omissions of the Engineer, its employees and/or its consultants in the performance of professional services under this Agreement.

§ 8.1.4 Intentionally Deleted.

§ 8.2 Mediation

§ 8.2.1 A dispute as defined under Article 8 is subject to mediation as a condition precedent to litigation in the Court of Common Pleas of Allegheny County, PA.

§ 8.2.2 The Owner and Engineer shall endeavor to resolve claims, disputes and other matters in question between them by mediation which, unless the parties mutually agree otherwise, shall be administered by a private, third-party mediator upon whom both the Owner and Engineer agree. A request for mediation shall be made in writing, delivered to the other party to the Contract and filed with the person administering the mediation. The request may be made concurrently with the filing of a Complaint but, in each event, mediation shall proceed in advance of litigation proceedings, which shall be stayed pending mediation for a period of 60 days from the date of filing, unless stayed for a longer period by agreement of the parties or by Court Order.

§ 8.2.3 The parties shall share the mediator's fee equally. The mediation shall be held in the place where the Project is located. Agreements reached in mediation shall be enforceable as settlement agreements in any court having jurisdiction thereof.

§ 8.2.4 If the parties do not resolve a dispute through mediation pursuant to this Section 8.2, the method of binding dispute resolution shall be the following:

(Check the appropriate

Paragraphs deleted)

box. If the Owner and Engineer do not select a method of binding dispute resolution below, or do not subsequently agree in writing to a binding dispute resolution method other than litigation, the dispute will be resolved in a court of competent jurisdiction.)

☐ Arbitration pursuant to Section 8.3 of this Agreement

☒ Litigation in the Court of Common Pleas of Allegheny County, PA

☐ Other: *(Specify)*

§ 8.3 Arbitration- Entire section intentionally deleted

(Paragraphs deleted)

ARTICLE 9 TERMINATION OR SUSPENSION

§ 9.1 If the Owner fails to make payments to the Engineer in accordance with this Agreement, the Engineer may upon seven (7) days written notice to the Owner, suspend performance of services under this Agreement unless payment in full is received by the Engineer within seven (7) days of the date of the Notice, the suspension shall take effect without further Notice. In the event of a suspension of services, the Engineer shall have no liability to the Owner for delay or damage caused the Owner because of such suspension of service, unless it is determined that the Engineer's suspension was wrongful or not in good faith. Before resuming services, the Engineer shall be paid all sums due prior to suspension and any expenses incurred, by the interruption and resumption of the Engineer's services. The Engineer's time schedules shall be equitably adjusted.

§ 9.2 If the Owner suspends the Project for more than thirty (30) consecutive days, the Engineer shall be compensated for services performed prior to notice of such suspension. When the Project is resumed, the Engineer shall be compensated for expenses incurred after the 30th day in the interruption and resumption of the Engineer's services. The Engineer's fees for the remaining services and the time schedules shall be equitably adjusted.

§ 9.3 This Agreement may be terminated by the Owner upon not less than seven (7) days' written notice to the Engineer in the event that the Project is permanently abandoned. If the Owner suspends the Project for more than 90 cumulative days for reasons other than the fault of the Engineer, the Engineer may terminate this Agreement by giving not less than seven (7) days' written notice.

§ 9.4 When the Contract is terminated by the Owner for cause, because of failure to perform, payment to the Engineer will be limited to fees, incentives and expenses actually earned and incurred less any damages that may be caused by

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the engineer's breach of contract. No payment is due to the Engineer in any event until the project is completed, all lien waivers are collected, and final waivers and releases of lien are obtained.

§ 9.5 Either party may terminate this Agreement upon not less than (7) seven days' written notice should the other party fail substantially to perform in accordance with the terms of this Agreement through no fault of the party initiating the termination.

§ 9.6 The Owner may terminate this Agreement upon not less than (7) seven days' written notice to the Engineer for the Owner's convenience and without cause.

§ 9.7 In

(Paragraphs deleted)

the event of termination not the fault of the Engineer, the Engineer shall be compensated for services performed prior to termination, together with Reimbursable Expenses then due.

(Paragraph deleted)

§ 9.9 The Owner's rights to use the Engineer's Instruments of Service in the event of a termination of this Agreement are set forth in Article 7 and Section 9.7.

ARTICLE 10 MISCELLANEOUS PROVISIONS

§ 10.1 This Agreement shall be governed by the laws of the Commonwealth of Pennsylvania.

§ 10.2 Terms in this Agreement shall have the same meaning as those in AIA Document A232–2019, General Conditions of the Contract for Construction.

§ 10.3 The Owner and Engineer, respectively, bind themselves, their agents, successors, assigns, and legal representatives to this Agreement. Neither the Owner nor the Engineer shall assign this Agreement without the written consent of the other, except that the Owner may assign this Agreement to a lender providing financing for the Project if the lender agrees to assume the Owner's rights and obligations under this Agreement, and including any payments due to the Engineer by the Owner prior to the assignment.

§ 10.4 If the Owner requests the Engineer to execute certificates, the proposed language of such certificates shall be submitted to the Engineer for review at least 14 days prior to the requested dates of execution. If the Owner requests the Engineer to execute consents reasonably required to facilitate assignment to a lender, the Engineer shall execute all such consents that are consistent with this Agreement, provided the proposed consent is submitted to the Engineer for review at least 14 days prior to execution. The Engineer shall not be required to execute certificates or consents that would require knowledge, services, or responsibilities beyond the scope of this Agreement.

§ 10.5 Nothing contained in this Agreement shall create a contractual relationship with, or a cause of action in favor of, a third party against either the Owner or Engineer.

§ 10.6 Unless otherwise required in this Agreement, the Engineer shall have no responsibility for the discovery, presence, handling, removal or disposal of, or exposure of persons to, hazardous materials or toxic substances in any form at the Project site.

§ 10.7 The Engineer shall have the right to include photographic or artistic representations of the design of the Project among the Engineer's promotional and professional materials. The Engineer shall be given reasonable access to the completed Project to make such representations. However, the Engineer's materials shall not include the Owner's confidential or proprietary information if the Owner has previously advised the Engineer in writing of the specific information considered by the Owner to be confidential or proprietary. The Owner shall provide professional credit for the Engineer in the Owner's promotional materials for the Project. This Section 10.7 shall survive the termination of this Agreement unless the Owner terminates this Agreement for cause pursuant to Section 9.4.

§ 10.8 If the Engineer or Owner receives information specifically designated as "confidential" or "business proprietary," the receiving party shall keep such information strictly confidential and shall not disclose it to any other person except as set forth in Section 10.8.1. This Section 10.8 shall survive the termination of this Agreement.

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§ 10.8.1 The receiving party may disclose "confidential" or "business proprietary" information after 7 days' notice to the other party, when required by law, arbitrator's order, or court order, including a subpoena or other form of compulsory legal process issued by a court or governmental entity, or to the extent such information is reasonably necessary for the receiving party to defend itself in any dispute. The receiving party may also disclose such information to its employees, consultants, or contractors in order to perform services or work solely and exclusively for the Project, provided those employees, consultants and contractors are subject to the restrictions on the disclosure and use of such information as set forth in this Section 10.8.

§ 10.9 The invalidity of any provision of the Agreement shall not invalidate the Agreement or its remaining provisions. If it is determined that any provision of the Agreement violates any law, or is otherwise invalid or unenforceable, then that provision shall be revised to the extent necessary to make that provision legal and enforceable. In such case the Agreement shall be construed, to the fullest extent permitted by law, to give effect to the parties' intentions and purposes in executing the Agreement.

ARTICLE 11 COMPENSATION

§ 11.1 For the Engineer's Basic Services described under Article 3, the Owner shall compensate the Engineer as follows:

- .1 Stipulated Sum
(Insert amount)

Three Hundred, Twelve Thousand (\$312,000.00)
- .2 Percentage Basis
(Insert percentage value)

() % of the Owner's budget for the Cost of the Work, as calculated in accordance with Section 11.6.
- .3 Other
(Describe the method of compensation)

§ 11.2 For the Engineer's Supplemental Services designated in Section 4.1.1 and for any Sustainability Services required pursuant to Section 4.1.3, the Owner shall compensate the Engineer as follows:
(Insert amount of, or basis for, compensation. If necessary, list specific services to which particular methods of compensation apply.)

§ 11.3 For Additional Services that may arise during the course of the Project, including those under Section 4.2, the Owner shall compensate the Engineer as follows:
(Insert amount of, or basis for, compensation.)

§ 11.4 Compensation for Supplemental and Additional Services of the Engineer's consultants when not included in Sections 11.2 or 11.3, shall be the amount invoiced to the Engineer plus percent (%), or as follows:
(Insert amount of, or basis for computing, Engineer's consultants' compensation for Supplemental or Additional Services.)

N/A

§ 11.5 When compensation for Basic Services is based on a stipulated sum or a percentage basis, the proportion of compensation for each phase of services shall be as follows: TBD

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Schematic Design Phase	Ten	percent (	10	%)
Design Development Phase	Twenty	percent (	20	%)
Construction Documents Phase	Forty	percent (	40	%)
Bidding Phase	Five	percent (	5	%)
Construction Phase	Twenty- Five	percent (	25	%)
Close Out Phase				
Total Basic Compensation	one hundred	percent (	100	%)

The Owner acknowledges that with an accelerated Project delivery or multiple bid package process, the Engineer may be providing its services in multiple Phases simultaneously. Therefore, the Engineer shall be permitted to invoice monthly in proportion to services performed in each Phase of Services, as appropriate.

§ 11.6 When compensation identified in Section 11.1 is on a percentage basis, progress payments for each phase of Basic Services shall be calculated by multiplying the percentages identified in this Article by the Owner's most recent budget for the Cost of the Work. Compensation paid in previous progress payments shall not be adjusted based on subsequent updates to the Owner's budget for the Cost of the Work.

§ 11.6.1 When compensation is on a percentage basis and any portions of the Project are deleted or otherwise not constructed, compensation for those portions of the Project shall be payable to the extent services are performed on those portions. The Engineer shall be entitled to compensation in accordance with this Agreement for all services performed whether or not the Construction Phase is commenced.

§ 11.7 The hourly billing rates for services of the Engineer and the Engineer's consultants are set forth below. The rates shall be adjusted in accordance with the Engineer's and Engineer's consultants' normal review practices. *(If applicable, attach an exhibit of hourly billing rates or insert them below.)*

N/A

(Table deleted)

§ 11.8 Compensation for Reimbursable Expenses

§ 11.8.1 Reimbursable Expenses are in addition to compensation for Basic, Supplemental, and Additional Services and include expenses incurred by the Engineer and the Engineer's consultants directly related to the Project, as follows:

- .1 Transportation and authorized out-of-town travel and subsistence;
- .2 Long distance services, dedicated data and communication services, teleconferences, Project web sites, and extranets;
- .3 Permitting and other fees required by authorities having jurisdiction over the Project;
- .4 Printing, reproductions, plots, and standard form documents;
- .5 Postage, handling, and delivery;
- .6 Expense of overtime work requiring higher than regular rates, if authorized in advance by the Owner;
- .7 Renderings, physical models, mock-ups, professional photography, and presentation materials requested by the Owner or required for the Project;
- .8 If required by the Owner, and with the Owner's prior written approval, the Engineer's consultants' expenses of professional liability insurance dedicated exclusively to this Project, or the expense of additional insurance coverage or limits in excess of that normally maintained by the Engineer's consultants;
- .9 All taxes levied on professional services and on reimbursable expenses;
- .10 Site office expenses; and
- .11 Registration fees and any other fees charged by the Certifying Authority or by other entities as necessary to achieve the Sustainable Objective.

§ 11.8.2 Reimbursable Expenses to be added to the fee total and billed at cost:

- .1 \$2,000.00 Allowance – Document Reproduction
- .2 \$3,000.00 Allowance - Mileage Reimbursement

§ 11.9 Engineer's Insurance

If the types and limits of coverage required in Section 2.6 are in addition to the types and limits the Engineer normally maintains, the Owner shall pay the Engineer for the additional costs incurred by the Engineer for the additional coverages as set forth below:

(Insert the additional coverages the Engineer is required to obtain in order to satisfy the requirements set forth in Section 2.6, and for which the Owner shall reimburse the Engineer.)

N/A

§ 11.10 Payments to the Engineer

§ 11.10.1 Initial Payments

§ 11.10.1.1 An initial payment of Zero (\$ 0) shall be made upon execution of this Agreement and is the minimum payment under this Agreement. It shall be credited to the Owner's account in the final invoice.

§ 11.10.1.2 If a Sustainability Certification is part of the Sustainable Objective, an initial payment to the Engineer of (\$) shall be made upon execution of this Agreement for registration fees and other fees payable to the Certifying Authority and necessary to achieve the Sustainability Certification. The Engineer's payments to the Certifying Authority shall be credited to the Owner's account at the time the expense is incurred.

§ 11.10.2 Progress Payments

§ 11.10.2.1 Unless otherwise agreed, payments for services shall be made monthly in proportion to services performed. Payments are due and payable upon presentation of the Engineer's invoice. Amounts unpaid Sixty (60) days after the invoice date shall bear interest at the rate entered below, or in the absence thereof at the legal rate prevailing from time to time at the principal place of business of the Engineer.

(Insert rate of monthly or annual interest agreed upon.)

Prime Plus Two % +2

§ 11.10.2.2 Additional costs incurred by the Owner necessitated by the Engineer's failure to render its services in a timely manner shall be deducted from the Engineer's fee.

§ 11.10.2.3 Records of Reimbursable Expenses, expenses pertaining to Supplemental and Additional Services, and services performed on the basis of hourly rates shall be available to the Owner at mutually convenient times.

ARTICLE 12 SPECIAL TERMS AND CONDITIONS

Special terms and conditions that modify this Agreement are as follows:

(Include other terms and conditions applicable to this Agreement.)

N/A

ARTICLE 13 SCOPE OF THE AGREEMENT

§ 13.1 This Agreement represents the entire and integrated agreement between the Owner and the Engineer and supersedes all prior negotiations, representations or agreements, either written or oral. This Agreement may be amended only by written instrument signed by both the Owner and Engineer.

§ 13.2 This Agreement is comprised of the following documents identified below:

- .1 AIA Document B132™-2019, Standard Form Agreement Between Owner and Engineer, Construction Manager as Adviser Edition

(Paragraphs deleted)

- .2 Exhibits:

(Check the appropriate box for any exhibits incorporated into this Agreement.)

N/A

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.3 Other documents:

(List other documents, if any, forming part of the Agreement.)

Exhibit A – Responsibility Matrix

This Agreement is entered into as of the day and year first written above.

OWNER *(Signature)*

(Printed name and title)

ENGINEER *(Signature)*

(Printed name, title, and license number, if applicable)

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Engineer /CM/Owner Responsibility Matrix

This matrix outlines the compatibility between AIA Document B132 - Standard Form of Agreement Between Owner and Architect and AIA Document C132 - Standard Form of Agreement Between Owner and Construction Manager.



Paragraph		Keywords	Roles of the Parties		
B132	C132		B132	C132	
3.1.3	3.2.6	Schedule of the A/E's services.	AE Submits CM Receives 0 Not Spec'd.	AE Approves CM Prepares 0 No Role	
3.1.4	3.2.6	Development and revising of the Project schedule.	AE Participates CM Participates 0 Not Spec'd.	AE Approves CM Prepares 0 No Role	
3.1.7		Contact governmental agencies to determine applicable design requirements.	AE Contacts CM Coordinates 0 Not Spec'd.	AE CM 0	
3.1.8	3.2.22	Filing for governmental approvals	AE Assists CM Assists 0 Files	AE Assists CM Assists 0 Files	
3.2.1	3.2.1	Review the program and other information.	AE Reviews CM Furnishes 0 Furnishes	AE Reviews CM Reviews 0 Furnishes	
3.2.2	3.2.2	Preliminary evaluation of the program, schedule, budget, project site and project delivery method.	AE Evaluates CM Not Spec'd. 0 Not Spec'd.	AE Evaluates CM Evaluates 0 No Role	

Paragraph B132	C132	Keywords	Roles of the Parties		
			B132	C132	
3.2.3	3.2.2	Present evaluation of program and discuss alternative approaches to design and construction with the Owner, discuss environmentally responsible design approaches	AE Evaluates CM Participates 0 Participates	AE Reviews CM Participates 0 Participates	
3.2.4		Prepare a preliminary design illustrating the scale and relationship of project components.	AE Prepares CM Receives 0 Approves	AE CM 0	
3.2.5		Prepare schematic documents based on approved preliminary design	AE Prepares CM Reviews 0 Approves	AE CM 0	
3.2.5.1		Environmentally responsible design alternatives	AE Considers CM Not Spec'd. 0 Not Spec'd.	AE CM 0	
3.2.5.2	3.2.5	Alternative materials, buildings systems, equipment and other considerations.	AE Considers CM Not Spec'd. 0 Not Spec'd.	AE Receives CM Recommends 0 Receives	
3.2.6	3.2.5	Draft Schematic Design Document submission. Schematic Design meeting.	AE Submits CM Reviews 0 Reviews	AE Prepares CM Review/Advise 0 Not Spec'd.	
3.2.7		Final Schematic Design Document submission. Identify agreed upon adjustments to (finalize) the Schematic Design (to be made in Design Development)	AE Identifies CM Not Spec'd. 0 Approves	AE CM 0	

Paragraph B132	C132	Keywords	Roles of the Parties		
			B132	C132	
3.3.1	3.2.5	Draft Design Development Document submission.	AE Prepares CM Reviews 0 Approves	AE Prepares CM Review/Advise 0 Not Spec'd.	
3.3.2	3.2.5	Design Development review meeting.	AE Participates CM Participates 0 Not Spec'd.	AE Prepares CM Review/Advise 0 Not Spec'd.	
3.3.3		Final Design Development Document submission. Identify agreed upon adjustments to (finalize) the Design Development Documents (to be made in the Construction Documents.)	AE Identifies CM Not Spec'd. 0 Approves	AE CM 0	
3.4.1	3.2.5	Draft Construction Documents submission.	AE Prepares CM Reviews 0 Approves	AE Prepares CM Review/Advise 0 Not Spec'd.	
3.4.2		Design requirements of governmental authorities	AE Incorporates CM Not Spec'd. 0 Not Spec'd.	AE CM 0	
3.4.2	3.2.11	If requested, assist in the preparation of 1) bidding and procurement information, 2) form of agreement between Owner and Contractor, 3) Conditions of the Contract and 4) the Project Manual	AE Assists CM Prepares 0 Requests	AE No Role CM Recommends 0 Not Spec'd.	
3.4.4	3.2.5	Construction Documents Review Meeting	AE Participates CM Participates 0 Not Spec'd.	AE Prepares CM Review/Advise 0 Not Spec'd.	

Paragraph B132	C132	Keywords	Roles of the Parties		
			B132		C132
3.4.5		Final Construction Document submission.	AE	Revise *	AE
			CM	Not Spec'd.	CM
			0	Approves	0
3.5.1	3.2.18	Establish list of prospective contractors.	AE	Assists	AE
			CM	Establishes	CM
			0	Establishes	0
3.5.2.2.1		Reproduction of the Bidding Documents	AE	Facilitates	AE
			CM	Not Spec'd.	CM
			0	Not Spec'd.	0
3.5.2.2.2	3.2.19	Pre-bid conference	AE	Participates	AE
			CM	Not Spec'd.	CM
			0	Not Spec'd.	0
3.5.2.2.3	3.2.19	Responses to questions from bidders	AE	Prepares	AE
			CM	Not Spec'd.	CM
			0	Not Spec'd.	0
3.5.2.3		Requests for bidding substitutions	AE	Considers	AE
			CM	Participates	CM
			0	Not Spec'd.	0
3.5.2.3	3.2.19	Addenda which identifies approved substitutions	AE	Prepares/Distributes	AE
			CM	Assists	CM
			0	Not Spec'd.	0

Paragraph B132	C132	Keywords	Roles of the Parties		
			B132		C132
3.5.1	3.2.20	Obtain bids, confirm responsiveness of bids, determine successful bid and award and prepare contracts	AE Assists CM Conducts 0 Approves	AE Assists CM Conducts 0 Approves	
3.6.2.1		Visit the site; inform the Owner of the progress and quality of the Work; report known defects and deficiencies in the Work to the Owner.	AE Advises CM Not Spec'd. 0 Participates	AE CM 0	
3.6.2.2	3.3.14	Rejection of Work and authorization of testing and inspection	AE Advises CM Participates 0 Authorizes	AE Receives CM Advises 0 Authorizes	
3.6.2.3		Interpret and decide matters concerning the performance under the requirements of the Contract Documents	AE Interpret/Decide CM Requests 0 Requests	AE CM 0	
3.6.2.4	3.3.18	Decisions on claims and disputes	AE Renders CM Not Spec'd. 0 Not Spec'd.	AE Renders CM Assists 0 Authorizes	
3.6.3	3.3.12.2	Process payment applications [Project Application and Project Certification for Payment]	AE Certifies CM Certifies 0 Executes	AE Certifies CM Certifies 0 Approves	
3.6.3.4	3.3.12.1	Records of applications and certificates for payment	AE Maintains CM Not Spec'd. 0 Not Spec'd.	AE Not Spec'd. CM Develops/Maintains 0 Not Spec'd.	

Paragraph B132	C132	Keywords	Roles of the Parties		
			B132		C132
3.6.4.1	3.3.19	Project Submittal Schedule	AE Reviews CM Prepares 0 Not Spec'd.	AE Approves CM Prepares 0 Not Spec'd.	
3.6.4.2	3.3.19	Processing of shop drawings, samples and product data approved and transmitted by the CM	AE Reviews/Takes Action CM Transmits 0 Not Spec'd.	AE Reviews/Takes Action CM Reviews/Takes Action 0 Not Spec'd.	
3.6.4.4	3.3.16	Requests for Information (RFI)	AE Responds CM Recommends 0 Not Spec'd.	AE Not Spec'd. CM Transmits 0 Not Spec'd.	
3.6.4.5	3.3.20.1.3	Records of submittals transmitted by the CM	AE Maintains CM Not Spec'd. 0 Not Spec'd.	AE Receives CM Records/Logs 0 Receives	
3.6.5.1	3.3.17	Process Change Orders and Construction Change Directives	AE Reviews/Takes Action CM Prepares 0 Approves	AE Approves CM Prepares/Approves 0 Approves	
3.6.5.2		Authorize minor changes in the Work not involving a change in Contract Sum	AE Authorizes CM Transmits 0 Not Spec'd.	AE CM 0	
3.6.5.3	3.3.20.1.4	Records of changes in the Work.	AE Maintains CM Not Spec'd. 0 Not Spec'd.	AE Receives CM Records/Logs 0 Receives	

Paragraph B132	C132	Keywords	Roles of the Parties		
			B132		C132
3.6.6.1	3.3.24	Inspection to determine the dates of Substantial Completion and Final Completion	AE Conducts CM Assists 0 Participates	AE Conducts CM Assists 0	AE Conducts CM Assists 0 Not Spec'd.
3.6.6.1	3.3.25	Certificates of Substantial Completion	AE Issues CM Prepares 0 Not Spec'd.	AE Executes CM Prepare/Execute 0	AE Executes CM Prepare/Execute 0 Receives
3.6.6.1	3.3.27	Warranties and related documents	AE Reviews CM Transmits 0 Not Spec'd.	AE Receives CM Receives/Forwards 0	AE Receives CM Receives/Forwards 0
3.6.6.1	3.3.35	Final Inspection indicating the Work complies with the requirements of the Contract Documents	AE Issues CM Not Spec'd. 0 Participates	AE Conducts CM Assists 0	AE Conducts CM Assists 0 Not Spec'd.
3.6.6.1	3.3.27	Final Certificate for Payment	AE Issues CM Receives/Forwards 0 Not Spec'd.	AE Receives CM Forwards 0	AE Receives CM Forwards 0 Not Spec'd.
3.6.6.3		Final disbursement of the remaining Contract Sum.	AE Advises CM Not Spec'd. 0 Authorizes	AE CM 0	AE CM 0
3.6.6.4		Review facility operation within one-year following Substantial Completion	AE Conducts CM Not Spec'd. 0 Requests	AE CM 0	AE CM 0

Paragraph B132	C132	Keywords	Roles of the Parties		
			B132		C132
3.2.1	3.2.1	Review the program furnished by the Owner and any evaluation by the AE	AE Reviews CM Furnishes 0 Furnishes	AE Reviews CM Reviews 0 Furnishes	
3.2.2	3.2.2	Evaluate program, schedule and budget in terms of each other	AE Evaluates CM Not Spec'd. 0 Not Spec'd.	AE Not Spec'd. CM Evaluates 0 Not Spec'd.	
3.2.3	3.2.3	Prepare Construction Management Plan	AE CM 0	AE Not Spec'd. CM Prepares 0 Receives	
3.2.7	3.2.4	Prepare estimates of Construction Cost for program based on preliminary designs prepared by the Architect	AE Identifies CM Not Spec'd. 0 Approves	AE Reviews CM Prepares 0 Approves	
3.2.7	3.2.5	Provide recommendations on relative feasibility of construction methods, availability of materials and labor, time for procurement, installation and construction and factors related to construction cost including costs of alternative designs or materials, preliminary budgets and possible economies.	AE Identifies CM Not Spec'd. 0 Approves	AE Receives CM Recommends 0 Receives	
3.1.3	3.2.6	Prepare and update Project Schedule	AE Submits CM Receives 0 Not Spec'd.	AE Reviews CM Prepares 0 Accepts	
3.1.3	3.2.6	Prepare schedule of AE services	AE Submits CM Receives 0 Not Spec'd.	AE Approves CM Prepares 0 Not Spec'd.	

Paragraph B132	C132	Keywords	Roles of the Parties		
			B132	C132	
3.2.6	3.2.7	Construction Cost Estimates	AE Submits CM Reviews 0 Reviews	AE Reviews CM Prepares 0 Approves	
3.2.6	3.2.8	Review documents for the integration of the design with cost and schedules	AE Submits CM Reviews 0 Reviews	AE Participates CM Recommends 0 Participates	
	3.2.9	Develop and codify temporary facilities, services and materials contract provisions	AE CM 0	AE Receives CM Recommends 0 Receives	
	3.2.10	Allocation of responsibilities for contractor safety programs	AE CM 0	AE Not Spec'd. CM Recommends 0 Receives	
3.4.2	3.2.11	Bid packaging for multiple prime contracts; coordinating the Work of the Contractors; verifying that the requirements are in the appropriate contract, jurisdictional disputes are minimized and coordination is made in order to phase the construction.	AE Assists CM Prepares 0 Requests	AE Not Spec'd. CM Recommends 0 Not Spec'd.	
	3.2.12	[Prepare and] Update the Project [construction] Schedule	AE CM 0	AE Not Spec'd. CM Prepares 0 Not Spec'd.	
	3.2.13	Expedite and coordinate ordering and delivery of materials	AE CM 0	AE Not Spec'd. CM Conducts 0 Not Spec'd.	

Paragraph		Keywords	Roles of the Parties		
B132	C132		B132		C132
3.2.14		Select, retain and coordinate surveyors, testing laboratories and special consultants	AE	AE	Not Spec'd.
			CM	CM	Assists
			0	0	Retains
3.2.15		Manpower analysis	AE	AE	Not Spec'd.
			CM	CM	Conducts
			0	0	Not Spec'd.
3.2.16		Equal opportunity employment requirements and other quasi governmental authority requirements	AE	AE	Not Spec'd.
			CM	CM	Assists
			0	0	Obtains
3.2.17		Update cost estimate and Project Schedule (following the Owner's approval of the Construction Documents)	AE	AE	Reviews
			CM	CM	Prepares
			0	0	Approves
3.5.1	3.2.18	Submit list of bidders	AE	AE	Reviews
			CM	CM	Submits
			0	0	Approves
3.5.2.2.2	3.2.19	Develop bidders' interest, issue bidding documents and conduct pre-bid conferences	AE	AE	Assists
			CM	CM	Conducts
			0	0	Not Spec'd.
3.5.2.2.3	3.2.19	Questions from bidders, issue addenda	AE	AE	Prepares
			CM	CM	Assists
			0	0	Not Spec'd.

Paragraph B132	C132	Keywords	Roles of the Parties		
			B132		C132
3.5.1	3.2.20	Receive bids, prepare bid analysis, recommend awards or rejections	AE Assists CM Participates 0 Participates	AE Not Spec'd. CM Prepares 0 Approves	
	3.2.21	Prepare contracts, advise on the acceptability of Subcontractors and material suppliers proposed by the Multiple Prime Contractors	AE CM 0	AE Not Spec'd. CM Assists 0 Prepares	
	3.2.22	Obtain building permits	AE CM 0	AE Assists CM Assists 0 Files	
	3.2.22	File for governmental approvals	AE CM 0	AE Assists CM Assists 0 Files	
	3.3.2	Provide staffing plan	AE CM 0	AE Not Spec'd. CM Participates 0 Not Spec'd.	
	3.3.3	Provide on-site administration of the Contracts in cooperation with the Architect as set forth in AIA A232	AE CM 0	AE Provides CM Provides 0 Not Spec'd.	
	3.3.4	Administration, management and related services to coordinate scheduled activities and responsibilities of the Multiple Prime Contractors with each other and with those of the CM, Owner and Architect.	AE CM 0	AE Participates CM Coordinates 0 Participates	

Paragraph B132	C132	Keywords	Roles of the Parties		
			B132		C132
3.3.5		Update Project [construction] schedule utilizing construction schedules provided by the Multiple Prime Contractors; recommend corrective actions if necessary	AE CM 0	AE CM 0	Receives Prepares Receives
3.3.6		Construction meetings	AE CM 0	AE CM 0	Not Spec'd. Conducts Not Spec'd.
3.3.6		Meeting minutes	AE CM 0	AE CM 0	Receives Prepares Receives
3.3.7		Schedule and coordinate sequence of construction and assignment of space in areas where Work is in progress	AE CM 0	AE CM 0	Not Spec'd. Coordinates Not Spec'd.
3.3.8		Schedule tests and inspections required by the Contract Documents	AE CM 0	AE CM 0	Receives Facilitates Receives
3.3.9		Endeavor to obtain satisfactory performance from the contractors	AE CM 0	AE CM 0	Not Spec'd. Endeavors Not Spec'd.
3.3.9		Recommend courses of action to be taken in the event that requirements of a contract are not being fulfilled.	AE CM 0	AE CM 0	Not Spec'd. Recommends Receives

Paragraph B132	C132	Keywords	Roles of the Parties		
			B132		C132
3.3.10		Monitor and evaluate actual costs of work in progress and estimated costs of completion of activities.	AE	AE	Not Spec'd.
			CM	CM	Monitors
			0	0	Not Spec'd.
3.3.10		Advise Owner of variances between actual and budgeted or estimated costs.	AE	AE	Not Spec'd.
			CM	CM	Advises
			0	0	Receives
3.3.10		Notify Contractors of inconsistencies among actual costs and estimated costs. Report contractors' cost information to the Owner.	AE	AE	Not Spec'd.
			CM	CM	Receives/Forwards
			0	0	Receives
3.3.11		Cash flow reports and forecasts	AE	AE	Not Spec'd.
			CM	CM	Prepares
			0	0	Receives
3.3.12		Construction cost accounting procedures	AE	AE	Not Spec'd.
			CM	CM	Develops/Maintains
			0	0	Not Spec'd.
3.6.3.4	3.3.12.1	Contractor's payment applications processing	AE	AE	Certifies
			CM	CM	Certifies
			0	0	Approves
3.6.3	3.3.12.2	Prepare "Summary of Contractors' Applications for Payment"	AE	AE	Certifies
			CM	CM	Prepares
			0	0	Not Spec'd.

Paragraph B132	C132	Keywords	Roles of the Parties		
			B132		C132
3.3.13		Review Contractor's safety programs	AE	AE	Not Spec'd.
			CM	CM	Reviews
			0	0	Not Spec'd.
3.6.2.2	3.3.14	Determine that the Work is being performed in accordance with the requirements of the Contract Documents; notify the Owner, Architect and Contractor of defects or deficiencies.	AE	AE	Receives
			CM	CM	Monitors
			0	0	Authorizes
3.3.14		Record rejection of the Work (on the Daily Log)	AE	AE	Receives
			CM	CM	Records/Logs
			0	0	Receives
3.3.14		Notice of tests and inspections (for the purpose of uncovering the Work)	AE	AE	Receives
			CM	CM	Provides
			0	0	Not Spec'd.
3.6.4.4	3.3.16	Transmit Requests for Information (RFI) with CM's recommended resolution; assist AE in answering the RFI.	AE	AE	Responds
			CM	CM	Records/Logs
			0	0	Not Spec'd.
3.3.17		Review requests for Change Orders, prepare Change Orders or CCD's based on the AE's modifications of the Contract Documents	AE	AE	Approves
			CM	CM	Prepares/Approves
			0	0	Approves
3.6.2.4	3.3.18	Review, evaluation and documentation of claims	AE	AE	Renders decision
			CM	CM	Assists
			0	0	Authorizes

Paragraph B132	C132	Keywords	Roles of the Parties		
			B132		C132
3.6.4.1	3.3.19	Project Submittal Schedule	AE Reviews CM Prepares 0 Not Spec'd.	AE Approves CM Prepares 0 Not Spec'd.	
3.3.19		Submittal Processing: Review, coordinate and transmit Submittals recommended by the CM for approval to the AE	AE Reviews/Takes Action CM Transmits 0 Not Spec'd.	AE Reviews/Takes Action CM Reviews/Takes Action 0 Not Spec'd.	
3.3.20		Maintain a Daily Log with: weather, work performed by each Contractor, number of workers, equipment on-site, problems encountered, etc.	AE CM 0	AE Receives CM Prepares 0 Receives	
3.6.5.3	3.3.20	Record the progress of the Project.	AE Maintains CM Not Spec'd. 0 Not Spec'd.	AE Receives CM Records/Logs 0 Receives	
3.3.21		Record documents	AE CM 0	AE Not Spec'd. CM Maintains 0 Receives	
3.3.22		Delivery, storage, protection and security of Owner-purchased materials, systems and equipment	AE CM 0	AE Not Spec'd. CM Coordinates 0 Not Spec'd.	
3.3.22		Final testing and start-up	AE CM 0	AE Observes CM Observes 0 Observes	

Paragraph		Keywords	Roles of the Parties			
B132	C132		B132		C132	
3.6.6.1	3.3.24	[Modifications Required] List of Work requiring completion or correction. Prepare schedule for completions/corrections.	AE CM 0	AE CM 0	Receives Jointly Prepares Not Spec'd.	
3.6.6.1	3.3.24	[Modification Required] Inspections to determine if Work is "substantially complete", but not "Substantially Complete".	AE CM 0	Conducts Assists Participates	AE CM 0	Conducts Assists Not Spec'd.
3.6.6.1	3.3.25	Certificate(s) of Substantial Completion	AE CM 0	Issues Prepares Not Spec'd.	AE CM 0	Executes Prepare/Execute Receives
3.6.6.1	3.3.25	Correction and completion of the Work [on punchlist]	AE CM 0		AE CM 0	Not Spec'd. Coordinates Not Spec'd.
3.6.6.1	3.3.25	Evaluate status of completion of punchlist work; recommend that A/E perform final inspection.	AE CM 0		AE CM 0	Not Spec'd. Recommends Not Spec'd.
3.6.6.1	3.3.35	Final inspection	AE CM 0	Issues Not Spec'd. Participates	AE CM 0	Conducts Assists Not Spec'd.
3.6.6.1	3.3.26	Certificates of Insurance, consent of surety, releases and waivers of liens (n/a), warranty information	AE CM 0		AE CM 0	Receives Receives/Forwards Receives

Paragraph		Keywords	Roles of the Parties			
B132	C132		B132		C132	
3.6.6.1	3.3.27	Close out documentation and items (warranties, manuals, record drawings, maintenance stocks, keys, etc.)	AE	Reviews	AE	Receives
			CM	Transmits	CM	Secures/transmits
			0	Not Spec'd.	0	Reviews
3.6.6.1	3.3.27	Final Project Application for Payment and Project Certificate for Payment	AE	Issues	AE	Receives
			CM	Receives/Forwards	CM	Forwards
			0	Not Spec'd.	0	Not Spec'd.
	3.3.29	Review facility operation within one-year following Substantial Completion	AE		AE	Not Spec'd.
			CM		CM	Conducts
			0		0	Requests

Fox Chapel Area School District

Agenda Study Session

October 2, 2023

Enrollment and Fire Drills

Fox Chapel Area School District															
Enrollment															
October 2023															
School	Pre-K	K	1	2	3	4	5	6	7	8	9	10	11	12	Total
Fairview Elementary School		17	20	20	21	21	22								362
		18	19	19	21	21	21								
		17	20	20	21	22	22								
Hartwood Elementary School		16	22	20	23	22	21								392
		14	23	20	23	22	22								
		16	23	20	24	21	21								
				19											
Kerr Elementary School	20	19	20	23	19	26	19								454
		18	21	22	19	26	19								
		18	21	23	19	26	19								
		17			19										
Spanish Immersion Class															
O'Hara Elementary School		22	22	25	21	23	25								720
		21	22	25	21	22	25								
		21	21	24	21	23	25								
		21	22	25	19	23	25								
		21	22	24	21	22	23								
Dorseyville Middle School															
								301	324	334					959
Fox Chapel Area High School											327	326	335	295	1,283
TOTAL	20	276	319	329	334	320	330	301	324	334	327	326	335	295	4,170

As of September 2023

Fire Drills			
Fairview Elementary School	09/21/23	4 Minutes	59 Seconds
Hartwood Elementary School	09/01/23	4 Minutes	39 Seconds
Kerr Elementary School	09/11/23	2 Minutes	34 Seconds
O'Hara Elementary School	09/13/23	5 Minutes	00 Seconds
Dorseyville Middle School	09/20/23	8 Minutes	08 Seconds
Fox Chapel Area High School	09/20/23	2 Minutes	25 Seconds