

# Saucon Valley School District

## Regular Meeting of the Board of Education

June 25, 2024

### High School Audion



Welcome to the meeting of the Saucon Valley School Board. Our objective is to serve the students, parents, and residents of our community. You are an important part of this meeting, and we look forward to your questions and comments.

We are all here for the same reason. All opinions are welcomed and equally valuable. Our only request is that we address each other with civility and respect. Our courtesy toward each other is the best way to show our students how much we respect them as well.

**Notice to Public** - This is to notify all in attendance at the Saucon Valley School Board meeting that the district is video and audio-taping the meeting, and the meeting will be posted for public viewing according to district policy.

## Agenda

No Executive Session

- I. **Call to the Order** – *Dr. Shamim Pakzad, President, presiding*
- II. **Pledge of Allegiance**
- III. **Recording of Attendance** – *Judith Riegel, Board Secretary*
- IV. **Motion to Approve Agenda**
- V. **Announcement of Executive Session** – None
- VI. **Approval of Minutes** – June 11, 2024
- VII. **Recognition** – None
- VIII. **Presentation** – None
- IX. **Superintendent’s Report** – *Jaime Vlasaty, Superintendent*
- X. **Courtesy of the Floor to Visitors – Agenda Items Only** – *Visitors should state their name and address.*
- XI. **Presentation of Bills** – *David Bonenberger*
  - A. General Expenditures – \$672,850.66
  - B. Cafeteria Expenditures – \$914.50
  - C. Health Benefits – \$233,474.61
  - D. Capital Projects – None

### Recommendations for Approval

#### Presentation of Bills

1. Approve the above Presentation of Bills.

**Recommendation:** To approve all motions and recommendations listed above in the Presentation of Bills.

**XII. Treasurer's Report – Donald Carpenter/David Bonenberger**

- A. Cash Investment and Bond Activity
- B. Condensed Board Summary Report
- C. Budget Transfers – None
- D. Middle School Activity Report – None
- E. High School Activity Report – None

**Recommendations for Approval****Treasurer's Report**

1. Approve the above Treasurer's Report.

**Recommendation: To approve all motions and recommendations listed in the Treasurer's Report.**

**XIII. AGENDA ITEMS****A. Education****Items/Projects for Discussion**

- A. OpenSciEd Presentation – Dr. Lensi Nikolov

**West Chester Drum Major Camp**

1. Approve participation in West Chester University Drum Major Camp for Roberta Silverthorn from July 22-25, 2024. The cost to the district is \$350. Transportation will be provided by the family.

**Science Textbook Adoption – Middle School**

2. Approve the adoption of OpenSciEd as the Middle School Science program.

**University of Pittsburgh Dual Credit Affiliation Agreement**

3. Approve a Dual Credit Affiliation Agreement with the University of Pittsburgh for the 2024-2025 school year.

**First Reading Policies – 805.1 & 805.2**

4. Approve the first reading of the following policies:

Policy 805.1 – Relations with Law Enforcement Agencies

Policy 805.1-AR-0 – Incident Report-Immediate Notification

Policy 805.1- AR-1 – Incident Report-Discretionary Notification

Policy 805.1-AR-2– Record of Law Enforcement Officers in School

Policy 805.2 – School Security Personnel

**Recommendation: To approve all motions and recommendations as listed above in Education**

**B. Personnel**

**Items/Projects for Discussion**

A. None

**Recommendations for Approval**

**Treasurer**

1. Approve Donald Carpenter as the Treasurer from July 1, 2024 – June 30, 2027.

**Administrative Assistant Classification Change**

2. Approve the change of classification for Kristi Curry from AA3 to AA4 (Administrative Assistant to the Principal) at an hourly rate of \$19.46 and \$1.00 per hour increase effective June 10, 2024.

**2024-2025 Athletic Winter Assistant Coaches**

3. Approve the following Athletic Winter Assistant Coaches for the 2024-2025 school year:

Basketball-Boys	Alex Parker	\$2,200.00
Basketball-Boys	Mark Quinn	\$2,200.00
Basketball-JH-Boys	Andy Brett	\$3,300.00
Basketball-JH-Boys	Cody Velez	\$1,100.00
Basketball-MS-Boys	Gunnar Pattinson	\$2,700.00
Basketball-Girls	Spence Pierce	\$5,300.00
Basketball-MS-Girls	John Tone	\$2,700.00
Wrestling-Varsity	Don Rohn	\$5,500.00
Wrestling-Varsity	Ben Chunko	Volunteer
Wrestling-JH	Andy Koch	\$4,500.00
Swimming – Boys/Girls	Kelly Spradlin	\$4,000.00

**2024-2025 Athletic Spring Head Coaches**

4. Approve the following Athletic Spring Head Coaches for the 2024-2025 school year:

Softball-Varsity	Terry Csrenko	\$5,900.00
Softball-Jr. High	Richard Brown	\$3,300.00
Track & Field-Boys & Girls	Ed Kolosky	\$5,650.00
Soccer-MS-Coed	Trent Seibert	\$3,300.00
Lacrosse – Boys	Zach Petiet	\$5,750.00
Lacrosse – Girls	Jane Hoff	\$5,750.00

**Maternity Leave**

5. Approve a maternity leave for Lauren Picketts, Elementary School, from approximately October 25, 2024, and she will be returning to her teaching duties on April 1, 2025.

**Marching Band Drill Writer**

6. Approve Ken Zimmerman as the Marching Band Drill Writer/Consultant for the 2024-2025 school year with a stipend of \$2,000.00.

**Recommendation:** To approve all motions and recommendations as listed above in Personnel.

**C. Facilities****Items/Projects for Discussion**

- A. Facilities Committee Meeting Summary – June 12, 2024

**Surplus/Obsolete Items**

1. Approve the attached list of Surplus/Obsolete items.

**Recommendation:** To approve all motions and recommendations as listed above in Facilities.

**D. Finance****Items/Projects for Discussion**

- A. Finance Committee Meeting Summary – June 19, 2024

**2024-2025 Final Budget\***

1. Approve the 2024-2025 final budget, consistent with school code, in the amount of \$52,998,768 for the operation of school and \$1,468,870 for facility maintenance, for a total of \$54,467,638, with \$339,041 coming from fund balance. There will be a 2.375 % tax increase, which generates tax revenue of \$809,836. The new millage rate will be 55.9570.

**2024-2025 Homestead and Farmstead Exclusion Resolution**

2. Approve the attached 2024-2025 Homestead and Farmstead Exclusion Resolution based on the school district real estate tax rate of 55.9570 with an exclusion for each approved homestead and farmstead in the amount of \$308.43

**Commitment Language of Fund Balance**

3. Approve the following categories regarding the Commitment of Fund Balance for the fiscal year ending June 30, 2024, as required per GASB54. The categories are GASB 45 Post-Retirement Costs; Reserve for Health Benefits; Capital Improvements/Replacement; and Post-Retirement Benefits other than healthcare.

**Senior Citizen Property Tax Rebate**

4. Approve the attached Senior Citizens Property Tax Rebate Resolution of 2024.

### 2024-2025 District Maintenance Contracts\*

5. Approve the attached 2024-2025 District Contracts with:  
 BJ Terroni, Chrin Disposal, Burkholder HVAV, Cintas, Degler Whiting, Dude Solutions, Ehrlich, Emergency Services, ET&T, Hydra, Integritech, Johnson Control, Keystone, Kiriposki Inc, Mountain Environmental, Otis Elevator, ProAC Corp, ProShred, Safety-Kleen, Spangler Boyer, STEM Landscaping, Tomlinson Bomberger, Trane, Tristate, TuWay Radio, Tyler Technologies.

### Lightspeed Filter and Securly Pass Core

6. Approve the proposal and purchase agreement with Trebron for Lightspeed Filter and Securly Pass Core (formerly EHallPass) for \$41,198.70.

### Center for Humanistic Change Agreement

7. Approve the agreement with the Center for Humanistic Change (CHC) to provide Liaison services to support the Student Assistance Program (SAP) for the 2024-2025 school year.

### The Donovan Group, LLC

8. Approve the contract with The Donovan Group, LLC for school communication services for the 2024-2025 school year at a cost of \$3,925 per month.

### Cardinal Point

9. Approve the service agreement with Cardinal Point Homeland Security Group for providing protective service personnel for the 2024-2025 school year at a rate of \$50/hour

### Solicitor Agreement

10. Motion to appoint Fox Rothschild LLP as Solicitor for the Saucon Valley School District from July 1, 2024, through June 30, 2025.

**Recommendation: To approve all motions and recommendations as listed above in Finance.**

## E. Community Updates

- **Hellertown/Lower Saucon Chamber of Commerce** – *John Conte*
- **Saucon Valley Foundation for Educational Innovation** – *Tracy Magnotta*

## F. Northampton Community College – *Susan Baxter* *(Meetings are on the first Thursday of every month)*

## G. Bethlehem Area Vo-Tech School – *Vivian Demko & Cedric Dettmar* *(Meetings are on the first Tuesday of every month)*

**H. Colonial Intermediate Unit – *Dr. Shamim Pakzad***  
*(Meetings are on the fourth Wednesday of every month)*

**Recommendation for Approval**

**Election of Board Member**

1. Approve the candidate for the Colonial Intermediate Unit 20 Board of School Directors, with a term of July 1, 2024-June 30, 2027, per board ballots.

**Recommendation: To approve all motions and recommendations as listed above in CIU 20**

**I. PSBA Representative – *Donald Carpenter***

**J. New Business**

**K. Old Business**

**XIV. Citizens' Inquiries and Comments – *Visitors should state their name and address.***

**XV. Announcements**

**Future Meetings ~**

July 9, 2024 – 7 pm – Business Meeting – High School Audion

July 23, 2024 – 7 pm – Business Meeting – High School Audion

**XVI. Motion to Adjourn Meeting**

***The Saucon Valley School District does not discriminate on the basis of race, color, national origin, age, sex, or handicap.***

The Business Meeting of the Board of Directors of the Saucon Valley School District was held on Tuesday, June 11, 2024, in the High School Audion. Present were Directors William Broun, Donald Carpenter, John Conte, Vivian Demko, Cedric Dettmar, Tracy Magnotta, Dr. Shamim Pakzad, and Jay Santos. Director Dr. Laurel Erickson-Parsons was absent. Judith Riegel, Board Secretary; Mark Fitzgerald, District Solicitor; and Jaime Vlasaty, Superintendent.

- I. **Call to the Order** – 7:10 pm - *Dr. Shamim Pakzad, President, presiding*
- II. **Pledge of Allegiance**
- III. **Recording of Attendance** – *Judith Riegel, Board Secretary*  
8-present, 1-absent (Erickson-Parsons)
- IV. **Motion to Approve Agenda** – Director Conte, seconded by Director Santos, moved to approve the Agenda. Vote: 8-yes, 0-no, 1-absent (Erickson-Parsons)
- V. **Announcement of Executive Session** – Legal, SVEA Contract, Personnel, Annual Safety & Security Report was presented.
- VI. **Approval of Minutes** – Director Dettmar, seconded by Director Conte, moved to approve the minutes of May 28, 2024. Vote: 8-yes, 0-no, 1-absent (Erickson-Parsons)
- VII. **Recognition** – District XI 3A Baseball Champions and PIAA State Qualifiers  
Deven Pandey- District XI Tennis #1 Singles Champion  
Virginia Kraus- District XI Track and Field 1600m Champion
- VIII. **Presentation** – None
- IX. **Superintendent’s Report** – *Jaime Vlasaty, Superintendent* - None
- X. **Courtesy of the Floor to Visitors – Agenda Items Only** – None
- XI. **Presentation of Bills** – *David Bonenberger*
  - A. General Expenditures – \$306,173.81
  - B. Cafeteria Expenditures – \$7,216.76
  - C. Health Benefits – None
  - D. Capital Projects – None
    1. Approve the above Presentation of Bills.

Director Dettmar, seconded by Director Conte, moved to approve the Presentation of Bills. Vote: 8-yes, 0-no, 1-absent (Erickson-Parsons)
- XII. **Treasurer’s Report** – *Donald Carpenter/David Bonenberger*
  - A. Cash Investment and Bond Activity - None
  - B. Condensed Board Summary Report - None
  - C. Budget Transfers – \$ 28,984.42
  - D. Middle School Activity Report – None
  - E. High School Activity Report – None

1. Approve the above Treasurer's Report.

Director Dettmar, seconded by Director Santos, moved to approve the Treasurer's Report. Vote: 8-yes, 0-no, 1-absent (Erickson-Parsons)

### **XIII. AGENDA ITEMS**

#### **A. Education**

##### **A. Academic & Personnel Committee Summary – June 5, 2024**

1. Approve the first reading of the following policies:

Policy 249 – Bullying/Cyberbullying

Policy 252 – Dating Violence

Policy 249 & 252 AR1 – Discrimination/Sexual Harassment /Bullying/  
Hazing/Dating Violence/Retaliation Report Form

Director Conte, seconded by Director Carpenter, moved to approve Education Item #1. Vote: 8-yes, 0-no, 1-absent (Erickson-Parsons)

2. Approve the first reading of the following policy:

Policy 236.1 - Threat Assessment

Director Dettmar, seconded by Director Santos, moved to approve Education Item #2. Vote: 8-yes, 0-no, 1-absent (Erickson-Parsons)

3. Approve the second and final reading of the following policies:

707 – Use of School Facilities

707 AR1 – Use of Facilities - Rules and Regulations

707 AR2 – Use of Facilities – Fee Sheet

915 – School Affiliated Organizations

Director Santos, seconded by Director Dettmar, moved to approve Education Item #3. Vote: 7-yes, 1-no (Broun), 1-absent (Erickson-Parsons)

#### **B. Personnel**

1. Approve Glenn Brown as the Home/School Visitor for the 2024-2025 school year at an hourly wage of \$25.00, with no benefits.
2. Approve Helen Ziegler as cafeteria crew manager, effective immediately, with a salary of \$25.34 per hour and benefits per the current Food Service Personnel Compensation & Benefits Plan. Ms. Ziegler is replacing Paula Miller, who recently resigned.

3. Approve Kristen Schlotter and Meredith Lesney as Summer Technology Assistants. Their schedule will be on an as-needed basis but not to exceed a total of 100 hours during the summer. Salary is \$15 per hour.
4. Approve Ingrid Hill, Kathleen Curry, and Betty Gerhard as part-time General Kitchen Help, effective the beginning of the 2024-25 school year, at an hourly rate of \$15.00, with benefits per the current Food Service Compensation & Benefits Plan, pending completion of employment paperwork.
5. Approve a maternity leave for Jessica Johnston, beginning approximately October 16, 2024. She plans on returning to her teaching duties on January 21, 2025.
6. Approve Dr. Lensi Nikolov as the District's Federal Program Coordinator for the 2023-2024 school year with a stipend of \$9,500.00.

Director Dettmar, seconded by Director Santos, moved to approve Personnel Items #1-6. Vote: 8-yes, 0-no, 1-absent (Erickson-Parsons)

### **C. Facilities**

1. Approve the attached list of Surplus/Obsolete items.

Director Dettmar, seconded by Director Carpenter, moved to approve Facilities Item #1. Vote: 8-yes, 0-no, 1-absent (Erickson-Parsons)

### **D. Finance**

#### **2023-2024 Budget Timeline for the 2024-2025 School Year**

**June 20, 2024** (10 days prior to final budget adoption deadline) – *District Deadline* to offer public notice of its intent to adopt the 2024-2025 final budget.

1. Approve the alternate method of billing for the Northampton Community College for the fiscal year July 1, 2024 to June 30, 2025.
2. Approve a contract with S. J. Thomas Company, Inc. in the amount of \$55,089.43 to install an outdoor stadium projection scoreboard, including excavation and electrical work. The contract is pending review and approval of the solicitor.
3. Approve the attached Resolution for a Public School Facility Improvement Grant.

- 4. Approve a contract with Lobar Associates Construction in the amount of \$91,525.63 to install an outdoor stadium projection scoreboard, which includes excavation and creating the scoreboard structure. The contract is pending review and approval of the solicitor.

Director Dettmar, seconded by Director Carpenter, moved to approve Finance Items #1-4. Vote: 8-yes, 0-no, 1-absent (Erickson-Parsons)

**E. Community Updates**

- **Hellertown/Lower Saucon Chamber of Commerce** – *John Conte*- No Report
- **Saucon Valley Foundation for Educational Innovation** – *Tracy Magnotta* – No Report

**F. Northampton Community College** – *Susan Baxter* – No Report

**G. Bethlehem Area Vo-Tech School** – *Vivian Demko & Cedric Dettmar* – Graduation was June 4, 2024.

**H. Colonial Intermediate Unit** – *Dr. Shamim Pakzad* -

**I. PSBA Representative** – *Donald Carpenter* -

**J. New Business** - Board President Pakzad would like to investigate having the Facilities and Finance Committees on the same night starting in July.

**K. Old Business** – None

**XIV. Citizens’ Inquiries and Comments** – None

**XV. Announcements**

**Future Meetings ~**

June 25, 2024 – 7 pm – Business Meeting – High School Audion

July 9, 2024 – 7 pm – Business Meeting – High School Audion

**XVI. Motion to Adjourn Meeting**

Board President Shamim Pakzad adjourned the meeting.

Time: 8:15 pm

ATTEST \_\_\_\_\_  
Secretary

\_\_\_\_\_  
President

## FUND ACCOUNTING PAYMENT SUMMARY

Bank Account: GF - FULTON BANK    Payment Dates: 06/26/2024 - 06/26/2024

Payment Categories: Regular Checks  
Sort: Payment Number

Payment #	Paymnt Dt	Vendor Name	Description Of Purchase	Description Of Purchase	Amount
		Achievement House Cyber Charter School	TUITION - CHARTER SCHOOLS		1,396.64
		AMERICAN RED CROSS	5/28/20204 - CPR Certification		390.00
		BUCKS COUNTY INTERMEDIATE	PROFESSIONAL EDU SVC IU 5-12		3,139.50
		BUS PARTS WAREHOUSE	Supplies		259.99
		C.J. WAGNER BOWLING SUPPLIES	SUPPLIES - ARTS AND THEATRE		131.00
		CARBON-LEHIGH I.U. #21	PROF ED SVC -NON-PUBLIC		1,629.00
		CHRISTMAS CITY STUDIO	PRINTING & BINDING PRINC K-4		1,805.53
		EASTON COACH COMPANY	bus trip to Philadelphia for State game		1,500.00
		ELAN FINANCIAL SERVICES	MISCELLANEOUS BUS OFFICE		100.00
		ENTERTAINMENT SERVICES GRP INC	HS Musical Mic Ear Pieces		297.00
		F.W. WEBB COMPANY	Supplies		109.63
		HEATHER CLARK	MISCELLANEOUS		60.00
		JENNIFER BRASKO	MISCELLANEOUS		116.00
		LEVIN LEGAL GROUP	SOLICITOR RETAINER		2,891.14
		LINCOLN INTERMEDIATE UNIT #12	CONF EMPL TRAINING 9-12		125.00
		MKSD ARCHITECTS	SOLICITOR RETAINER		885.00
		MUHLENBERG MEDICAL REPAIR INC.	OTHER PROF SVCS ATHLETICS		444.00
		PASBO	STAFF DEVELP SVC - TRAINING		75.00
		PAYLESS CLEANERS	LAUNDRY LINENS DRY CLEAN 9-12		505.75
		ProShred Security Philadelphia	Repair/Maintenance Equipment		702.00
		ROHRER BUS SALES INC.	Supplies		1,142.65

\* - Non-Negotiable Disbursement    + - Procurement Card Non-Negotiable    # - Payable within Payment    P - Prenote    D - Direct Deposit    C - Credit Card    ^ - Virtual Payment

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Bank Account: GF - FULTON BANK    Payment Dates: 06/26/2024 - 06/26/2024

Payment Categories: Regular Checks  
Sort: Payment Number

Payment #	Paymnt Dt	Vendor Name	Description Of Purchase	Description Of Purchase	Amount
		SAUCON VALLEY CAFETERIA	BOARD SVC - MEALS / REF		14.55
		SCHULMERICH BELLS	7/3/2023 - Music Repair, Maintenance		650.00
		SERVICE ELECTRIC TELEPHONE CO.	TELEPHONE		1,136.15
		SERVICE TIRE TRUCK CENTERS	SUPPLIES - TRANSPORTATION		293.00
		SHOP SPECIALTIES	Yearly Machine Maintenance		1,400.00
		ST. LUKE'S HOSPITAL	D&A SCREENING		144.00
		THE COLLEGE BOARD	MISCELLANEOUS		22,890.32
		THE MORNING CALL	ADVERTISING		229.52
		THEATRE WORLD BACKDROPS LLC	SUPPLIES - ARTS AND THEATRE		725.00
		TODAYS CLASSROOM LLC	Desks for Art Class		8,572.55
<b>10 - GENERAL FUND</b>					<b>53,759.92</b>
<b>Grand Total All Funds</b>					<b>53,759.92</b>
<b>Grand Total Credit Cards</b>					<b>0.00</b>
<b>Grand Total Direct Deposits</b>					<b>0.00</b>
<b>Grand Total Manual Checks</b>					<b>0.00</b>
<b>Grand Total Other Disbursement Non-negotiables</b>					<b>0.00</b>
<b>Grand Total Procurement Card Other Disbursement Non-negotiables</b>					<b>0.00</b>
<b>Grand Total Regular Checks</b>					<b>53,759.92</b>
<b>Grand Total Virtual Payments</b>					<b>0.00</b>
<b>Grand Total All Payments</b>					<b>53,759.92</b>

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Bank Account: GF - FULTON BANK    Payment Dates: 06/26/2024 - 06/26/2024

Payment Categories: Direct Deposits  
Sort: Payment Number

Payment #	Paymnt Dt	Vendor Name	Description Of Purchase	Description Of Purchase	Amount
		ABA SUPPORT SERVICES LLC	L SUPPORT OTHER PROF SERVICES		31,509.49 <i>D</i>
		AGORA CYBER CHARTER SCHOOL	TUITION - CHARTER SCHOOLS		11,173.08 <i>D</i>
		ALL PHASE ELECTRIC SUPPLY	SUPPLIES - PLANT OPERATIONS	Repair/Maintenance Equipment	2,299.64 <i>D</i>
		AMAZON CAPITAL SERVICES	5/9/2024 - FCS Supplies	Supplies for SAIL	6,062.59 <i>D</i>
		AMERICHEM	SUPPLIES - PLANT OPERATIONS		1,569.20 <i>D</i>
		APPLE INC.	Scoreboard Hardware	Macbook Air Repair	986.00 <i>D</i>
		ASCENDANCE TRUCKS PENNSYLVANIA LLC	SUPPLIES - TRANSPORTATION		1,588.34 <i>D</i>
		B & B ELECTRICAL CONTRACTORS INC.	Repair/Maintenance Equipment		8,200.04 <i>D</i>
		BANCROFT	SPEC ED NON-PUBLIC TUITION		4,840.00 <i>D</i>
		BARRY ISETT & ASSOCIATES INC	BLDGS - OTHER PROF SERVICES		8,257.50 <i>D</i>
		BAYADA HOME HEALTH CARE	PURCH PROF & TECH SVCS		763.75 <i>D</i>
		BRIGHTBILL BODY WORKS	SUPPLIES - TRANSPORTATION		1,212.46 <i>D</i>
		BSN SPORTS LLC	SUPPLIES BASEBALL VARSITY	SUPPLIES BASEBALL JV	1,954.64 <i>D</i>
		CAPSTONE ACADEMY	SPEC ED NON-PUBLIC TUITION		12,836.50 <i>D</i>
		CENTER STAGE LIGHTING & RIGGING INC.	SUPPLIES - ARTS AND THEATRE		3,750.00 <i>D</i>
		CHRIN HAULING INC	DISPOSAL SVCS		4,700.00 <i>D</i>
		CINTAS CORPORATION-#101	ADD FUNDS TO PO 24-084		67.44 <i>D</i>
		COMMONWEALTH CHARTER ACADEMY	SPEC ED TUITION CHARTER SCHOOL	TUITION - CHARTER SCHOOLS	93,436.81 <i>D</i>
		Complete Document Solutions, PA, LLC	PRINTING & BINDING	PRINTING & BINDING PRINC 5-8	1,424.83 <i>D</i>

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Payment Categories: Direct Deposits  
Sort: Payment Number

Payment #	Paymnt Dt	Vendor Name	Description Of Purchase	Description Of Purchase	Amount
		CONSTELLATION ENERGY GAS SERVICES LLC	NATURAL GAS - PLANT OPERATIONS		3,122.72 <i>D</i>
		EASTON ARTS ACADEMY ELEMENTARY CHARTER SCHOOL	TUITION - CHARTER SCHOOLS		4,189.91 <i>D</i>
		EPLUS TECHNOLOGY INC.	Cameras		10,019.12 <i>D</i>
		EVERDRIVEN TECHNOLOGIES LLC	Transportation Cont Carriers		6,067.23 <i>D</i>
		EXECUTIVE EDUCATION ACADEMY CHARTER SCHOOL	TUITION - CHARTER SCHOOLS		8,821.55 <i>D</i>
		FOLLETT CONTENT SOLUTIONS LLC	Library Books		38.57 <i>D</i>
		FOX ROTHSCHILD LLP	SOLICITOR RETAINER		9,020.00 <i>D</i>
		GENERAL HEALTHCARE RESOURCES LLC	SPEC ED - OTHER PROF SERVICE	L SUPPORT OTHER PROF SERVICES	2,299.99 <i>D</i>
		GRAINGER	Supplies		1,527.12 <i>D</i>
		HAND STEPHANIE	MISCELLANEOUS		60.00 <i>D</i>
		HILLENDALE ASSOCIATES, INC.	HEALTH INSURANCE EXPENSE PAYAB		1,260.00 <i>D</i>
		IMAGINE LEARNING LLC	PROF ED SERVICES -OTH ED AGCY		8,400.00 <i>D</i>
		INSIGHT PA CYBER CHARTER SCHOOL	TUITION - CHARTER SCHOOLS		2,793.27 <i>D</i>
		INTEGRITEC INC.	Repair/Maintenance Equipment		465.00 <i>D</i>
		J.C. EHRLICH	REPAIRS & MAINTENANCE		576.13 <i>D</i>
		JOHNSON CONTROLS	REPAIRS & MAINTENANCE		1,320.00 <i>D</i>
		JOHNSTONE SUPPLY	Supplies		385.77 <i>D</i>
		KATHRYN FISHER	TUITION REIMB REGULAR 9-12		1,677.00 <i>D</i>
		KEYSTONE FIRE AND SECURITY	REPAIRS & MAINTENANCE		488.00 <i>D</i>
		LAKESIDE EDUCATIONAL NETWORK	SPEC ED - OTHER PROF SERVICE		883.40 <i>D</i>

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Payment Categories: Direct Deposits  
Sort: Payment Number

Payment #	Paymnt Dt	Vendor Name	Description Of Purchase	Description Of Purchase	Amount
		LARRY & ANTHONY FERRARO	Custom Diploma Covers		830.80 <i>D</i>
		LEHIGH VALLEY ACADEMY REGIONAL CHARTER SCHOOL	TUITION - CHARTER SCHOOLS	SPEC ED TUITION CHARTER SCHOOL	60,913.04 <i>D</i>
		LEHIGH VALLEY DUAL LANGUAGE CHARTER SCHOOL	SPEC ED TUITION CHARTER SCHOOL	TUITION - CHARTER SCHOOLS	4,646.27 <i>D</i>
		LISA MICHELLE BASARA	TRANSP - CONTRACT CARRIERS - COMP ED		2,000.00 <i>D</i>
		MELMARK	SPEC ED NON-PUBLIC TUITION		44,320.00 <i>D</i>
		MICROBAC LABORATORIES INC.	Repair/Maintenance Equipment		166.32 <i>D</i>
		MUSIC & ARTS	Blanket P.O. Band sheet music/instrument supplies		149.20 <i>D</i>
		MUSIC & ARTS	7/10/2023 - Blanket PO for School Instrument Repair		119.00 <i>D</i>
		NANCY BOHNHORST	TRAVEL-CONFERENCES/SEMINARS		95.09 <i>D</i>
		NORTHAMPTON COUNTY AREA COMMUNITY COLLEGE	NCC COMTY COLLEGE PAYMENT		23,301.75 <i>D</i>
		NORTHEAST JANITORIAL SUPPLY	SUPPLIES - PLANT OPERATIONS		903.44 <i>D</i>
		PENNSYLVANIA LEADERSHIP CHARTER SCHOOL	TUITION - CHARTER SCHOOLS	SPEC ED TUITION CHARTER SCHOOL	19,525.34 <i>D</i>
		PETROLEUM TRADERS CORP.	DIESEL FUEL - TRANSPORTATION		21,084.00 <i>D</i>
		PP & L ELECTRIC UTILITIES	ELECTRIC - PLANT OPERATIONS		38,014.94 <i>D</i>
		QUINCY COMPRESSOR LLC	Repair/Maintenance Equipment		78.79 <i>D</i>
		RACEWAY CHEVROLET	SUPPLIES - TRANSPORTATION		40.19 <i>D</i>
		Randi McCullough	SPECIAL ED TRAVEL		129.98 <i>D</i>
		REACH CYBER CHARTER SCHOOL	TUITION - CHARTER SCHOOLS	SPEC ED TUITION CHARTER SCHOOL	11,629.44 <i>D</i>
		RICHARD KUHNS	DRIVER PHYSICALS		95.00 <i>D</i>
		ROBERT FREY	TRAVEL-CONFERENCES/SEMINARS	NON-INSTRUCTIONAL STAFF DEVEL - TRAVEL	323.56 <i>D</i>

\* - Non-Negotiable Disbursement    + - Procurement Card Non-Negotiable    # - Payable within Payment    P - Prenote    D - Direct Deposit    C - Credit Card    ^ - Virtual Payment

## FUND ACCOUNTING PAYMENT SUMMARY

Bank Account: GF - FULTON BANK    Payment Dates: 06/26/2024 - 06/26/2024

Payment Categories: Direct Deposits  
Sort: Payment Number

Payment #	Paymnt Dt	Vendor Name	Description Of Purchase	Description Of Purchase	Amount
		ROBERTO CLEMENTE CHARTER SCHOOL	TUITION - CHARTER SCHOOLS		8,379.82 <i>D</i>
		SANTA ZANCHETTIN	REG ED - PROF ED SVCS - HS - ESL	REG ED - PROF ED SVCS - MS - ESL	360.00 <i>D</i>
		Saucon True Value	SUPPLIES - PLANT OPERATIONS	Supplies	1,151.72 <i>D</i>
		SCHOOL SPECIALTY, LLC.	FOSS curriculum		32,595.70 <i>D</i>
		SEVEN GENERATIONS CHARTER SCHOOL	TUITION - CHARTER SCHOOLS	SPEC ED TUITION CHARTER SCHOOL	20,465.61 <i>D</i>
		TELEMEDICINE MANAGEMENT INC.	HEALTH INSURANCE EXPENSE PAYAB		1,255.00 <i>D</i>
		THE LEHIGH VALLEY CHARTER H.S. FOR THE ARTS INC.	TUITION - CHARTER SCHOOLS	SPEC ED TUITION CHARTER SCHOOL	29,758.15 <i>D</i>
		THE STEPPING STONES GROUP LLC	LEARN SUPPT - PROF SVC - PCCD - MS - MTHL		5,530.00 <i>D</i>
		TRACY MULLEN	SPECIAL ED TRAVEL	SPEC EDUCATION DUES AND FEES	744.52 <i>D</i>
		UGI CORP	NATURAL GAS - PLANT OPERATIONS		7,544.20 <i>D</i>
		WEX HEALTH INC	PURCHASED PRO&TECH SVCS		260.70 <i>D</i>
		XEROX FINANCIAL SERVICES	LEASE PRINCIPAL EXPENDITURES		22,632.08 <i>D</i>

\* - Non-Negotiable Disbursement    + - Procurement Card Non-Negotiable    # - Payable within Payment    P - Prenote    D - Direct Deposit    C - Credit Card    ^ - Virtual Payment

# FUND ACCOUNTING PAYMENT SUMMARY

Bank Account: GF - FULTON BANK    Payment Dates: 06/26/2024 - 06/26/2024

Payment Categories: Direct Deposits  
Sort: Payment Number

10 - GENERAL FUND	620,767.74
Grand Total All Funds	620,767.74
Grand Total Credit Cards	0.00
Grand Total Direct Deposits	620,767.74
Grand Total Manual Checks	0.00
Grand Total Other Disbursement Non-negotiables	0.00
Grand Total Procurement Card Other Disbursement Non-negotiables	0.00
Grand Total Regular Checks	0.00
Grand Total Virtual Payments	0.00
Grand Total All Payments	619,090.74

\* - Non-Negotiable Disbursement    + - Procurement Card Non-Negotiable    # - Payable within Payment    P - Prenote    D - Direct Deposit    C - Credit Card    ^ - Virtual Payment

## FUND ACCOUNTING PAYMENT SUMMARY

Bank Account: GF - FULTON BANK    Payment Dates: 06/26/2024 - 06/26/2024

Payment Numbers: 0000001169 - 0000001170

Payment Categories: Regular Checks

Sort: Payment Number

Payment #	Paymnt Dt	Vendor Name	Description Of Purchase	Description Of Purchase	Amount
		PENN JERSEY PAPER CO. LLC	DUE TO/FROM CAFETERIA FUND		61.25
		POCONO MOUNTAIN DAIRIES	DUE TO/FROM CAFETERIA FUND		853.25
<b>10 - GENERAL FUND</b>					<b>914.50</b>
<b>Grand Total All Funds</b>					<b>914.50</b>
<b>Grand Total Credit Cards</b>					<b>0.00</b>
<b>Grand Total Direct Deposits</b>					<b>0.00</b>
<b>Grand Total Manual Checks</b>					<b>0.00</b>
<b>Grand Total Other Disbursement Non-negotiables</b>					<b>0.00</b>
<b>Grand Total Procurement Card Other Disbursement Non-negotiables</b>					<b>0.00</b>
<b>Grand Total Regular Checks</b>					<b>914.50</b>
<b>Grand Total Virtual Payments</b>					<b>0.00</b>
<b>Grand Total All Payments</b>					<b>914.50</b>

\* - Non-Negotiable Disbursement    + - Procurement Card Non-Negotiable    # - Payable within Payment    P - Prenote    D - Direct Deposit    C - Credit Card    ^ - Virtual Payment

## FUND ACCOUNTING PAYMENT SUMMARY

Bank Account: PH - PLGIT HEALTH BENEFIT    Payment Dates: 05/25/2024 - 06/24/2024

Payment Categories: Regular Checks, Non-negotiable Disbursements, Manual Checks  
Sort: Payment Number

Payment #	Paymnt Dt	Vendor Name	Description Of Purchase	Description Of Purchase	Amount
* 00W3964599	05/30/2024	DELTA DENTAL	WEEKLY CLAIMS		3,677.50
* 00W3964600	05/30/2024	DELTA DENTAL	ADMIN FEES		1,139.85
* 00W3966132	05/31/2024	CAPITAL BLUE CROSS	WEEKLY CLAIMS		40,713.37
* 00W3967711	06/04/2024	DELTA DENTAL	WEEKLY CLAIMS		2,542.00
* 00W3971105	06/07/2024	CAPITAL BLUE CROSS	WEEKLY CLAIMS		53,899.45
* 00W3974468	06/13/2024	DELTA DENTAL	WEEKLY CLAIMS		4,368.70
* 00W3975840	06/14/2024	CAPITAL BLUE CROSS	WEEKLY CLAIMS		48,421.61
* 00W3977414	06/18/2024	DELTA DENTAL	WEEKLY CLAIMS		3,997.20
* 00W3979101	06/20/2024	EQUITABLE FINANCIAL LIFE INSURANCE CO. OF AMERICA	LTD/LIFE JUNE		5,393.28
* 00W3979106	06/20/2024	VISION BENEFITS OF AMERICA	MAY CLAIMS		1,292.55
* 00W3980815	06/24/2024	CAPITAL BLUE CROSS	WEEKLY CLAIMS		68,029.10
<b>10 - GENERAL FUND</b>					<b>233,474.61</b>
<b>Grand Total All Funds</b>					<b>233,474.61</b>
<b>Grand Total Credit Cards</b>					<b>0.00</b>
<b>Grand Total Direct Deposits</b>					<b>0.00</b>
<b>Grand Total Manual Checks</b>					<b>0.00</b>
<b>Grand Total Other Disbursement Non-negotiables</b>					<b>233,474.61</b>
<b>Grand Total Procurement Card Other Disbursement Non-negotiables</b>					<b>0.00</b>
<b>Grand Total Regular Checks</b>					<b>0.00</b>
<b>Grand Total Virtual Payments</b>					<b>0.00</b>
<b>Grand Total All Payments</b>					<b>233,474.61</b>

\* - Non-Negotiable Disbursement    + - Procurement Card Non-Negotiable    # - Payable within Payment    P - Prenote    D - Direct Deposit    C - Credit Card    ^ - Virtual Payment

**Cash, Investment and Bond Activity May 31, 2024**

**CASH ACCOUNTS**

	<b>Balance May 1, 2024</b>	<b>Earnings/Deposits</b>	<b>Disbursements</b>	<b>Balance May 31, 2024</b>
PLGIT General - New	\$ 658,916.75	\$ 772,709.52	\$ 877,521.35	\$ 554,104.92
PLGIT/CLASS	14,466,224.44	59,754.64	3,525,000.00	11,000,979.08
PLGIT General	428,542.82	3,832,213.08	1,429,879.12	2,830,876.78
PLGIT Salary	660,759.21	1,257,170.34	1,900,707.29	17,222.26
PLGIT Health Benefits	18,128.51	242,936.58	242,936.58	18,128.51
PLGIT Cafeteria	543,753.80	192,498.35	37,623.57	698,628.58
PLGIT Reserve Class	73.78	0.33	0.00	74.11
Lafayette General	739,231.82	1,732,648.54	1,507,764.05	964,116.31
Lafayette Flexible Spending	49,416.67	12,444.86	25,553.19	36,308.34
Lafayette Cafeteria	109,207.84	50,722.43	100,000.55	59,929.72
<b>Total Cash Accounts</b>	<b>\$ 17,674,255.64</b>	<b>\$ 8,153,098.67</b>	<b>\$ 9,646,985.70</b>	<b>\$ 16,180,368.61</b>

\*Earnings/Deposits includes transfers of \$5,137,551.78 between accounts

\*\*Disbursements includes transfers of \$5,137,551.78 between accounts

**INVESTMENT ACCOUNTS**

	<b>Balance May 1, 2024</b>	<b>Earnings/Deposits</b>	<b>Disbursements</b>	<b>Balance May 31, 2024</b>
PSDLAF	\$ 8,473,383.03	\$ 26,260.56	\$ -	\$ 8,499,643.59
PLGIT / PLUS (61)	0.00	0.00	0.00	0.00
<b>Total Investment Accounts</b>	<b>\$ 8,473,383.03</b>	<b>\$ 26,260.56</b>	<b>\$ -</b>	<b>\$ 8,499,643.59</b>

	<b>Balance May 1, 2024</b>	<b>Earnings/Deposits</b>	<b>Disbursements</b>	<b>Balance May 31, 2024</b>
1998 Construction Fund (195-04)	\$ -	\$ -	\$ -	\$ -
G.O. Bonds, Series of 2017 (195-14)	0.00	0.00	0.00	0.00
2003 Emmaus Bond Const Fund (195-08)	0.00	0.00	0.00	0.00
Land Purchase GOB Series 2005 (195-10)	0.00	0.00	0.00	0.00
GESP Phase II GOB Series 2013A (195-12)	0.00	0.00	0.00	0.00
<b>Total Bond Issue</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

**CAPITAL RESERVE FUND**

	<b>Balance May 1, 2024</b>	<b>Earnings/Deposits</b>	<b>Disbursements</b>	<b>Balance May 31, 2024</b>
Capital Reserve Fund	\$ 71.91	\$ 0.92	\$ -	\$ 72.83

(UNADJUSTED)

Condensed Board Summary Report

From 05/01/2024 To 05/31/2024

Summarization Level: MAJOR FUND/MAJOR FUNCTION/SUB FUNCTION/FULL FUNCTION

Account	Description	Current Budget	PTD Exp/Rev	YTD Exp/Rev	YTD Outstanding Enc	Balance	YTD% Used
10	GENERAL FUND						
1000							
1100							
1110	REG PROG ELEM/SECONDARY	22,065,084.00	2,257,518.93	17,041,410.29	76,399.82	4,947,273.89	77.58
	<b>Total</b>	<b>22,065,084.00</b>	<b>2,257,518.93</b>	<b>17,041,410.29</b>	<b>76,399.82</b>	<b>4,947,273.89</b>	<b>77.58</b>
1200							
1225	SPEECH	427,681.00	47,089.43	351,986.91	17.06	75,677.03	82.31
1231	EMOTIONAL SUPPORT	376,502.00	51,427.50	345,462.06	0.00	31,039.94	91.76
1241	LEARNING SUPPORT	7,610,181.00	898,487.02	7,438,544.96	366.85	171,269.19	97.75
1243	GIFTED SUPPORT	277,909.00	52,172.27	265,829.88	0.00	12,079.12	95.65
1270	MULTI-HANDICAPPED SUPPT	0.00	0.00	0.00	0.00	0.00	0.00
1290	OTHER SUPPORT	124,000.00	0.00	0.00	0.00	124,000.00	0.00
	<b>Total</b>	<b>8,816,273.00</b>	<b>1,049,176.22</b>	<b>8,401,823.81</b>	<b>383.91</b>	<b>414,065.28</b>	<b>95.30</b>
1300	VOCATIONAL EDUCATION						
1390	VOCATIONAL EDUCATION	1,015,792.00	80,193.00	935,585.00	0.00	80,207.00	92.10
	<b>Total</b>	<b>1,015,792.00</b>	<b>80,193.00</b>	<b>935,585.00</b>	<b>0.00</b>	<b>80,207.00</b>	<b>92.10</b>
1400	OTHER INSTR. PROGRAMS						
1410	DRIVERS' EDUCATION	0.00	0.00	0.00	0.00	0.00	0.00
1420	SUMMER SCHOOL	22,664.00	0.00	12,977.19	0.00	9,686.81	57.26
1430	HOMEBOUND INSTRUCTION	13,457.00	2,740.94	16,582.40	0.00	(3,125.40)	123.23
1441	ADJ / COURT PLACED PROG	0.00	0.00	0.00	0.00	0.00	0.00
1442	ALTERNATIVE EDUCATION	0.00	0.00	0.00	0.00	0.00	0.00
1450	INSTRUCTIONAL PROGRAMS OUTSIDE EST'D SCHOOL DAY	0.00	180.00	1,550.00	0.00	(1,550.00)	0.00
1480	TITLE I	0.00	0.00	0.00	0.00	0.00	0.00

(UNADJUSTED)

Condensed Board Summary Report

From 05/01/2024 To 05/31/2024

Summarization Level: MAJOR FUND/MAJOR FUNCTION/SUB FUNCTION/FULL FUNCTION

Account	Description	Current Budget	PTD Exp/Rev	YTD Exp/Rev	YTD Outstanding Enc	Balance	YTD% Used
1490	ACCOUNTABILITY	0.00	0.00	0.00	0.00	0.00	0.00
	<b>Total</b>	<b>36,121.00</b>	<b>2,920.94</b>	<b>31,109.59</b>	<b>0.00</b>	<b>5,011.41</b>	<b>86.13</b>
1500	NONPUBLIC SCHOOL PGMS						
1500	NONPUBLIC SCHOOL PGMS	0.00	0.00	(41.76)	0.00	41.76	0.00
	<b>Total</b>	<b>0.00</b>	<b>0.00</b>	<b>(41.76)</b>	<b>0.00</b>	<b>41.76</b>	<b>0.00</b>
1600							
1693	COMMUNITY COLLEGE	291,232.00	23,301.75	302,843.00	0.00	(11,611.00)	103.99
	SPSHP						
	<b>Total</b>	<b>291,232.00</b>	<b>23,301.75</b>	<b>302,843.00</b>	<b>0.00</b>	<b>(11,611.00)</b>	<b>103.99</b>
2000							
2100	SUPPORT SERVICES PUPIL						
2120	GUIDANCE SERVICES	1,138,991.00	106,543.59	853,092.12	0.00	285,898.88	74.90
2130	ATTENDANCE SERVICES	6,100.00	119.13	1,515.33	0.00	4,584.67	24.84
2140	PSYCHOLOGICAL SERVICES	327,381.00	35,028.63	257,905.04	1,156.62	68,319.34	79.13
2150	SPEECH PATH/AUDIOLOGY	0.00	0.00	0.00	0.00	0.00	0.00
	<b>Total</b>	<b>1,472,472.00</b>	<b>141,691.35</b>	<b>1,112,512.49</b>	<b>1,156.62</b>	<b>358,802.89</b>	<b>75.63</b>
2200	SUPPORT SERVICES-INSTRU						
2200	SUPPORT SERVICES-INSTRU	0.00	0.00	0.00	0.00	0.00	0.00
2220	TECH SUPPORT SERVICES	843,605.00	58,508.79	675,349.83	0.00	168,255.17	80.06
2230	EDU TELEVISION SERVICES	4,500.00	0.00	1,956.24	0.00	2,543.76	43.47
2250	SCHOOL LIBRARY SERVICES	643,157.00	54,189.30	431,748.05	525.51	210,883.44	67.21
2260	INSTRUCTION & CURR DEV	301,697.00	49,614.42	391,403.07	266.47	(89,972.54)	129.82
2271	INSTRUC STAFF DEVEL SVC	324,458.00	18,824.75	105,674.56	8,422.66	210,360.78	35.17
2272	NON CERTIFIED PROF DEV	0.00	0.00	0.00	0.00	0.00	0.00
2280	NONPUBLIC SUPPORT SVC	0.00	0.00	0.00	0.00	0.00	0.00

(UNADJUSTED)  
**Condensed Board Summary Report**  
 From 05/01/2024 To 05/31/2024

Summarization Level: MAJOR FUND/MAJOR FUNCTION/SUB FUNCTION/FULL FUNCTION

Account	Description	Current Budget	PTD Exp/Rev	YTD Exp/Rev	YTD Outstanding Enc	Balance	YTD% Used
2290	OTHER INSTRUC STAFF SVC	221,311.00	39,330.68	241,809.32	0.00	(20,498.32)	109.26
	<b>Total</b>	<b>2,338,728.00</b>	<b>220,467.94</b>	<b>1,847,941.07</b>	<b>9,214.64</b>	<b>481,572.29</b>	<b>79.41</b>
2300	SUPPORT SERVICES-ADMIN						
2310	BOARD SERVICES	62,785.00	396.94	109,682.32	0.00	(46,897.32)	174.70
2320	BOARD TREASURER SERVICE	250.00	0.00	375.00	0.00	(125.00)	150.00
2330	TAX ASSESS & COLLECTION	162,500.00	18,116.22	145,788.45	0.00	16,711.55	89.72
2340	STAFF RELATIONS/NEGO	0.00	0.00	0.00	0.00	0.00	0.00
2350	LEGAL SERVICES	150,000.00	16,085.00	95,738.91	0.00	54,261.09	63.83
2360	OFFICE SUPERINTENDENT	489,246.00	51,770.17	486,089.54	0.00	3,156.46	99.35
2380	OFFICE OF PRINCIPAL SVC	1,611,180.00	164,813.66	1,422,970.18	17,232.24	170,977.58	89.39
	<b>Total</b>	<b>2,475,961.00</b>	<b>251,181.99</b>	<b>2,260,644.40</b>	<b>17,232.24</b>	<b>198,084.36</b>	<b>92.00</b>
2400	SUPP SVC-PUBLIC HEALTH						
2420	MEDICAL SERVICES	0.00	0.00	0.00	0.00	0.00	0.00
2430	DENTAL SERVICES	600.00	0.00	0.00	0.00	600.00	0.00
2440	NURSING SERVICES	489,838.00	51,280.45	418,420.73	0.00	71,417.27	85.42
	<b>Total</b>	<b>490,438.00</b>	<b>51,280.45</b>	<b>418,420.73</b>	<b>0.00</b>	<b>72,017.27</b>	<b>85.32</b>
2500	SUPP SERVICES-BUSINESS						
2511	SUPP SERVICES-BUSINESS	903,474.00	94,585.48	792,607.94	0.00	110,866.06	87.73
	<b>Total</b>	<b>903,474.00</b>	<b>94,585.48</b>	<b>792,607.94</b>	<b>0.00</b>	<b>110,866.06</b>	<b>87.73</b>
2600							
2660	SECURITY SERVICES	179,000.00	16,692.65	208,874.70	0.00	(29,874.70)	116.69
2690	OPER OF BLDG SERVICES	5,200,179.00	437,674.97	4,532,233.90	500,523.20	167,421.90	96.78
	<b>Total</b>	<b>5,379,179.00</b>	<b>454,367.62</b>	<b>4,741,108.60</b>	<b>500,523.20</b>	<b>137,547.20</b>	<b>97.44</b>
2700							

(UNADJUSTED)

Condensed Board Summary Report

From 05/01/2024 To 05/31/2024

Summarization Level: MAJOR FUND/MAJOR FUNCTION/SUB FUNCTION/FULL FUNCTION

Account	Description	Current Budget	PTD Exp/Rev	YTD Exp/Rev	YTD Outstanding Enc	Balance	YTD% Used
2790	STUDENT TRANSP SERVICES	2,999,555.00	387,307.68	2,951,015.94	104,634.24	(56,095.18)	101.87
	<b>Total</b>	<b>2,999,555.00</b>	<b>387,307.68</b>	<b>2,951,015.94</b>	<b>104,634.24</b>	<b>(56,095.18)</b>	<b>101.87</b>
2800	SUPPORT SVCS-CENTRAL						
2820	INFORMATION SERVICES	0.00	0.00	12,456.00	0.00	(12,456.00)	0.00
2823	PUBLIC INFORMATION SVC	0.00	0.00	0.00	0.00	0.00	0.00
2830	STAFF SERVICES	0.00	0.00	0.00	0.00	0.00	0.00
2832	RECRUITMENT & PLACEMENT	0.00	0.00	0.00	0.00	0.00	0.00
2834	STAFF DEV - NON-CERT	2,000.00	0.00	569.00	279.00	1,152.00	42.40
2836	STAFF DEVELOPMENT SVCS	1,100.00	230.00	1,557.48	0.00	(457.48)	141.59
2850	STATE & FED AGENCY SVCS	0.00	0.00	0.00	0.00	0.00	0.00
	<b>Total</b>	<b>3,100.00</b>	<b>230.00</b>	<b>14,582.48</b>	<b>279.00</b>	<b>(11,761.48)</b>	<b>479.40</b>
2900	OTHER SUPPORT SERVICES						
2910	OTHER SUPPORT SERVICES	24,354.00	0.00	24,827.94	0.00	(473.94)	101.95
	<b>Total</b>	<b>24,354.00</b>	<b>0.00</b>	<b>24,827.94</b>	<b>0.00</b>	<b>(473.94)</b>	<b>101.95</b>
3000	OP OF NONINSTRUCT SVC						
3000	OP OF NONINSTRUCT SVC						
3000	OP OF NONINSTRUCT SVC	0.00	0.00	0.00	0.00	0.00	0.00
	<b>Total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
3100	FOOD SERVICES						
3100	FOOD SERVICES	0.00	0.00	0.00	0.00	0.00	0.00
	<b>Total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
3200	STUDENT ACTIVITIES						
3200	STUDENT ACTIVITIES	240,495.00	64,889.45	191,774.89	2,816.90	45,903.21	80.91
3250	SCHOOL ATHLETICS	1,100,673.00	241,891.42	787,050.38	68,359.82	245,262.80	77.72

(UNADJUSTED)

Condensed Board Summary Report

From 05/01/2024 To 05/31/2024

Summarization Level: MAJOR FUND/MAJOR FUNCTION/SUB FUNCTION/FULL FUNCTION

Account	Description	Current Budget	PTD Exp/Rev	YTD Exp/Rev	YTD Outstanding Enc	Balance	YTD% Used
	<b>Total</b>	<b>1,341,168.00</b>	<b>306,780.87</b>	<b>978,825.27</b>	<b>71,176.72</b>	<b>291,166.01</b>	<b>78.29</b>
3300	COMMUNITY SERVICES						
3300	COMMUNITY SERVICES	12,181.00	2,467.90	9,979.89	0.00	2,201.11	81.93
	<b>Total</b>	<b>12,181.00</b>	<b>2,467.90</b>	<b>9,979.89</b>	<b>0.00</b>	<b>2,201.11</b>	<b>81.93</b>
4000	FACILITIES ACQUISITION						
4600	EXISTING BLDG IMPROVE						
4600	EXISTING BLDG IMPROVE	7,461,129.00	172,757.79	4,638,132.46	2,995,327.38	(172,330.84)	102.31
	<b>Total</b>	<b>7,461,129.00</b>	<b>172,757.79</b>	<b>4,638,132.46</b>	<b>2,995,327.38</b>	<b>(172,330.84)</b>	<b>102.31</b>
5000	OTHER EXPEND & FINANCE						
5100	OTHER EXPEND & FINANCE						
5100	OTHER EXPEND & FINANCE	0.00	0.00	0.00	0.00	0.00	0.00
5110	DEBT SERVICE	1,930,052.00	0.00	1,931,444.48	0.00	(1,392.48)	100.07
5130	REFUND PRIOR YR REV	0.00	0.00	0.00	0.00	0.00	0.00
5140	LEASE EXPENDITURES	133,152.00	0.00	113,186.52	0.00	19,965.48	85.01
	<b>Total</b>	<b>2,063,204.00</b>	<b>0.00</b>	<b>2,044,631.00</b>	<b>0.00</b>	<b>18,573.00</b>	<b>99.10</b>
5200	FUND TRANSFERS						
5230	CAPITAL PROJ TRANSFERS	0.00	0.00	0.00	0.00	0.00	0.00
5251	FOOD SVC FUND TRANSFER	100,000.00	0.00	0.00	0.00	100,000.00	0.00
5280	ACTIVITY FUND TRANSFERS	0.00	0.00	0.00	0.00	0.00	0.00
	<b>Total</b>	<b>100,000.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>100,000.00</b>	<b>0.00</b>
5800	SUSPENSE ACCOUNT						
5800	SUSPENSE ACCOUNT	0.00	0.00	0.00	0.00	0.00	0.00
	<b>Total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
5900	BUDGETARY RESERVE						
5900	BUDGETARY RESERVE	0.00	0.00	0.00	0.00	0.00	0.00

(UNADJUSTED)

Condensed Board Summary Report

From 05/01/2024 To 05/31/2024

Summarization Level: MAJOR FUND/MAJOR FUNCTION/SUB FUNCTION/FULL FUNCTION

Account	Description	Current Budget	PTD Exp/Rev	YTD Exp/Rev	YTD Outstanding Enc	Balance	YTD% Used
	<b>Total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>6000</b>	REVENUE LOCAL SOURCES						
<b>6000</b>	REVENUE LOCAL SOURCES						
<b>6001</b>	FUND BALANCE	(7,663,739.00)	0.00	0.00	0.00	(7,663,739.00)	0.00
	<b>Total</b>	<b>(7,663,739.00)</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>(7,663,739.00)</b>	<b>0.00</b>
<b>6100</b>	TAXES LEVIED						
<b>6111</b>	REAL ESTATE TAXES	(32,487,172.00)	(18,314.42)	(31,820,493.72)	0.00	(666,678.28)	97.95
<b>6112</b>	INTERIM REAL ESTATE TAX	(220,156.00)	(28,037.19)	(418,717.32)	0.00	198,561.32	190.19
<b>6113</b>	PUBLIC UTILITY REALTY	(35,000.00)	0.00	(33,133.71)	0.00	(1,866.29)	94.67
<b>6120</b>	PER CAPITA TAX	0.00	0.00	0.00	0.00	0.00	0.00
<b>6141</b>	ACT 511 PC FLAT	0.00	0.00	0.00	0.00	0.00	0.00
<b>6143</b>	EMER MUNIC SVC TAX	(26,000.00)	(6,776.98)	(48,665.45)	0.00	22,665.45	187.17
<b>6151</b>	EARNED INCOME TAX	(4,100,000.00)	(625,297.02)	(3,752,643.86)	0.00	(347,356.14)	91.53
<b>6153</b>	REALTY TRANSFER TAX	(500,000.00)	(144,732.53)	(652,405.54)	0.00	152,405.54	130.48
	<b>Total</b>	<b>(37,368,328.00)</b>	<b>(823,158.14)</b>	<b>(36,726,059.60)</b>	<b>0.00</b>	<b>(642,268.40)</b>	<b>98.28</b>
<b>6400</b>	DELINQUENCY TAXES						
<b>6411</b>	DELINQUENT RE TAX	(880,000.00)	(112,954.15)	(1,192,251.58)	0.00	312,251.58	135.48
<b>6420</b>	DELINQUENT PC SECT 679	0.00	(66.00)	(616.60)	0.00	616.60	0.00
<b>6441</b>	DELINQUENT PC 511	0.00	(60.50)	(612.11)	0.00	612.11	0.00
	<b>Total</b>	<b>(880,000.00)</b>	<b>(113,080.65)</b>	<b>(1,193,480.29)</b>	<b>0.00</b>	<b>313,480.29</b>	<b>135.62</b>
<b>6500</b>	EARNINGS ON INVESTMENTS						
<b>6510</b>	INTEREST ON INVESTMENTS	(600,000.00)	(92,072.75)	(1,186,203.89)	0.00	586,203.89	197.70
<b>6530</b>	GAIN/LOSS ON INVESTMTS	0.00	0.00	0.00	0.00	0.00	0.00
	<b>Total</b>	<b>(600,000.00)</b>	<b>(92,072.75)</b>	<b>(1,186,203.89)</b>	<b>0.00</b>	<b>586,203.89</b>	<b>197.70</b>

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Summarization Level: MAJOR FUND/MAJOR FUNCTION/SUB FUNCTION/FULL FUNCTION

Account	Description	Current Budget	PTD Exp/Rev	YTD Exp/Rev	YTD Outstanding Enc	Balance	YTD% Used
6700							
6710	ADMISSIONS	(71,300.00)	(11,073.82)	(51,176.53)	0.00	(20,123.47)	71.78
6740	FEES	0.00	0.00	0.00	0.00	0.00	0.00
6750	STUDENT EVT- SPEC EVENT	0.00	0.00	0.00	0.00	0.00	0.00
6790	OTHR STUDENT ACT INCOME	(15,000.00)	0.00	(1,955.25)	0.00	(13,044.75)	13.04
	<b>Total</b>	<b>(86,300.00)</b>	<b>(11,073.82)</b>	<b>(53,131.78)</b>	<b>0.00</b>	<b>(33,168.22)</b>	<b>61.57</b>
6800							
6821	STATE REV REC OTHER PA	0.00	0.00	0.00	0.00	0.00	0.00
6831	FUNDS OTHER PA SCH DST	0.00	0.00	0.00	0.00	0.00	0.00
6832	FEDERAL IDEA REVENUE	(238,450.00)	0.00	0.00	0.00	(238,450.00)	0.00
6833	AARP IDEA	0.00	0.00	0.00	0.00	0.00	0.00
6837	FED REV CARES ACT-CNTY	0.00	0.00	0.00	0.00	0.00	0.00
6839	FEDERAL REVENUE - OTHER	0.00	0.00	0.00	0.00	0.00	0.00
	<b>Total</b>	<b>(238,450.00)</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>(238,450.00)</b>	<b>0.00</b>
6900	REVENUE LOCAL SOURCES						
6910	USE OF FACILITIES	(3,500.00)	0.00	(1,946.96)	0.00	(1,553.04)	55.63
6920	CONTRIBUTION & DONATION	0.00	0.00	0.00	0.00	0.00	0.00
6941	REGULAR SCH TUITION	0.00	(845.20)	(4,289.48)	0.00	4,289.48	0.00
6942	SUMMER SCHOOL TUITION	(4,000.00)	0.00	0.00	0.00	(4,000.00)	0.00
6944	Tuition other LEA's	(4,000.00)	0.00	0.00	0.00	(4,000.00)	0.00
6980	COMMUNITY ACTIVITY REV	(5,000.00)	(1,785.00)	(4,756.00)	0.00	(244.00)	95.12
6990	MISCELLANEOUS REVENUE	0.00	(20,363.33)	(28,719.90)	0.00	28,719.90	0.00
6991	REFUND OF P/Y EXPEND	0.00	0.00	0.00	0.00	0.00	0.00
6992	ENERGY EFF REV & INCENT	0.00	0.00	0.00	0.00	0.00	0.00

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Account	Description	Current Budget	PTD Exp/Rev	YTD Exp/Rev	YTD Outstanding Enc	Balance	YTD% Used
6999	Miscellaneous	(30,000.00)	(19,973.48)	(61,220.17)	0.00	31,220.17	204.07
	<b>Total</b>	<b>(46,500.00)</b>	<b>(42,967.01)</b>	<b>(100,932.51)</b>	<b>0.00</b>	<b>54,432.51</b>	<b>217.06</b>
<b>7000</b>							
7100	BASIC INS. OPR. SUBSIDIES						
7110	BASIC EDUCATION	0.00	0.00	0.00	0.00	0.00	0.00
7111	BASIC EDUCATION SUBSIDY	(4,365,246.00)	(1,012,187.12)	(4,176,282.12)	0.00	(188,963.88)	95.67
7112	SOCIAL SECURITY SUBSIDY	(836,084.00)	0.00	0.00	0.00	(836,084.00)	0.00
7140	CHARTER SCHOOLS	0.00	0.00	0.00	0.00	0.00	0.00
7160	Tuition for 1305 & 1306	0.00	(30,064.51)	(30,064.51)	0.00	30,064.51	0.00
	<b>Total</b>	<b>(5,201,330.00)</b>	<b>(1,042,251.63)</b>	<b>(4,206,346.63)</b>	<b>0.00</b>	<b>(994,983.37)</b>	<b>80.87</b>
7200	REVENUE EDU PROGRAMS						
7210	HOMEBOUND INSTRUCTION	0.00	0.00	0.00	0.00	0.00	0.00
7220	VOCATIONAL EDUCATION	0.00	0.00	0.00	0.00	0.00	0.00
7230	ALTERNATIVE EDUCATION	0.00	0.00	0.00	0.00	0.00	0.00
7250	MIGRATORY CHILDREN	0.00	0.00	0.00	0.00	0.00	0.00
7271	SPECIAL EDUCATION	(1,130,678.00)	(414,067.74)	(1,178,168.28)	0.00	47,490.28	104.20
7299	DIRECT PMT - PRRS & APS	0.00	0.00	0.00	0.00	0.00	0.00
	<b>Total</b>	<b>(1,130,678.00)</b>	<b>(414,067.74)</b>	<b>(1,178,168.28)</b>	<b>0.00</b>	<b>47,490.28</b>	<b>104.20</b>
7300	REVENUE NON-ED. PROGRAMS						
7310	TRANSPORTATION	0.00	0.00	0.00	0.00	0.00	0.00
7311	SD TRANSPORTATION	(285,000.00)	0.00	(209,402.13)	0.00	(75,597.87)	73.47
7312	NP TRANSPORTATION	(115,000.00)	0.00	(50,050.00)	0.00	(64,950.00)	43.52
7320	RENT & SINK FUND PYMT	0.00	0.00	0.00	0.00	0.00	0.00
7330	MEDICAL/DENTAL SVCS	(42,000.00)	0.00	(32,762.16)	0.00	(9,237.84)	78.01

(UNADOUSTED)

### Condensed Board Summary Report

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Summarization Level: MAJOR FUND/MAJOR FUNCTION/SUB FUNCTION/FULL FUNCTION

Account	Description	Current Budget	PTD Exp/Rev	YTD Exp/Rev	YTD Outstanding Enc	Balance	YTD% Used
7340	SUPPLEMENTAL REIMBURSE	(1,166,618.00)	0.00	(1,166,617.95)	0.00	(0.05)	100.00
7360	SAFE SCHOOLS	0.00	0.00	0.00	0.00	0.00	0.00
7361	PCCD Grant	0.00	0.00	0.00	0.00	0.00	0.00
7362	School Mental Health & Safety and Security Grant	0.00	(31,398.69)	(189,558.92)	0.00	189,558.92	0.00
	<b>Total</b>	<b>(1,608,618.00)</b>	<b>(31,398.69)</b>	<b>(1,648,391.16)</b>	<b>0.00</b>	<b>39,773.16</b>	<b>102.47</b>
7500	ACCOUNTABILITY GRANT						
7500	ACCOUNTABILITY GRANT	0.00	0.00	0.00	0.00	0.00	0.00
7501	Accountability Grant	0.00	0.00	0.00	0.00	0.00	0.00
7505	READY TO LEARN BLK GRNT	(142,538.00)	0.00	(142,538.00)	0.00	0.00	100.00
7506	PA SMART GRANTS	0.00	0.00	0.00	0.00	0.00	0.00
7510	EXTRA GRANTS	0.00	0.00	0.00	0.00	0.00	0.00
7599	EXTRA GRANTS	0.00	0.00	0.00	0.00	0.00	0.00
	<b>Total</b>	<b>(142,538.00)</b>	<b>0.00</b>	<b>(142,538.00)</b>	<b>0.00</b>	<b>0.00</b>	<b>100.00</b>
7800	REVENUE PA SHARE BEN.						
7810	FICA - STATE	0.00	(186,097.34)	(564,507.27)	0.00	564,507.27	0.00
7820	RETIREMENT - STATE	(3,719,126.00)	0.00	(2,864,990.86)	0.00	(854,135.14)	77.03
	<b>Total</b>	<b>(3,719,126.00)</b>	<b>(186,097.34)</b>	<b>(3,429,498.13)</b>	<b>0.00</b>	<b>(289,627.87)</b>	<b>92.21</b>
7900	REVENUE TECHNOLOGY						
7920	CLASSROOMS FOR FUTURE	0.00	0.00	0.00	0.00	0.00	0.00
7990	OTHER TECHNOLOGY GRANT	0.00	0.00	0.00	0.00	0.00	0.00
	<b>Total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
8000							
8500	FEDERAL GRANTS-IN-AID						
8512	IDEA Part B	0.00	0.00	0.00	0.00	0.00	0.00

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Account	Description	Current Budget	PTD Exp/Rev	YTD Exp/Rev	YTD Outstanding Enc	Balance	YTD% Used
8513	TITLE I GRANT IMPROV	0.00	0.00	0.00	0.00	0.00	0.00
8514	Title I	(262,154.00)	(100,985.65)	(288,953.17)	0.00	26,799.17	110.22
8515	TITLE II	(55,578.00)	0.00	(64,550.60)	0.00	8,972.60	116.14
8516	TITLE III ESL	(6,420.00)	0.00	(580.44)	0.00	(5,839.56)	9.04
8517	DRUG FREE SCHOOLS	(14,686.00)	(14,487.00)	(23,316.28)	0.00	8,630.28	158.77
8518	TITLE V	0.00	0.00	0.00	0.00	0.00	0.00
8519	TITLE II/TITLE V GRANT	0.00	0.00	0.00	0.00	0.00	0.00
8570	TITLE II EESE GRANT	0.00	0.00	0.00	0.00	0.00	0.00
	<b>Total</b>	<b>(338,838.00)</b>	<b>(115,472.65)</b>	<b>(377,400.49)</b>	<b>0.00</b>	<b>38,562.49</b>	<b>111.38</b>
8600	OTHER FED.GRANTS-IN-AID						
8670	DRUG FREE SCHOOLS	0.00	0.00	0.00	0.00	0.00	0.00
8680	TITLE III	0.00	0.00	0.00	0.00	0.00	0.00
8690	OTHER FEDERAL GRANTS	0.00	0.00	0.00	0.00	0.00	0.00
	<b>Total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
8700							
8701	IDEA PART B - ARRA	0.00	0.00	0.00	0.00	0.00	0.00
8708	ARRA FISCAL STAB - BE	0.00	0.00	0.00	0.00	0.00	0.00
8709	Basic Ed - Ed Jobs	0.00	0.00	0.00	0.00	0.00	0.00
8741	CARE ACT - ESSER FUNDNG	0.00	0.00	0.00	0.00	0.00	0.00
8742	GOV EMER ED RELIEF FUND	0.00	0.00	0.00	0.00	0.00	0.00
8743	ESSER II - CRRSA ACT	0.00	0.00	0.00	0.00	0.00	0.00
8744	ARP ESSER III	0.00	0.00	(390,195.19)	0.00	390,195.19	0.00
8747	EMERGENCY CONNECTIVITY	0.00	0.00	0.00	0.00	0.00	0.00
8749	CARES ACT - PCCD FUNDNG	0.00	0.00	0.00	0.00	0.00	0.00

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Account	Description	Current Budget	PTD Exp/Rev	YTD Exp/Rev	YTD Outstanding Enc	Balance	YTD% Used
8751	ARP ESSER 7% LEARNING LOSS	0.00	0.00	(7,877.08)	0.00	7,877.08	0.00
8752	ARP ESSER 7% SUMMER PROGRAMS	0.00	0.00	(1,575.40)	0.00	1,575.40	0.00
8753	ARP ESSER 7% AFTERSCHOOL PROGRAMS	0.00	0.00	(1,575.44)	0.00	1,575.44	0.00
	<b>Total</b>	<b>0.00</b>	<b>0.00</b>	<b>(401,223.11)</b>	<b>0.00</b>	<b>401,223.11</b>	<b>0.00</b>
8800	ACCESS REIMBURSEMENTS						
8810	MEDICAL ASSISTANCE	(265,000.00)	0.00	(32,908.87)	0.00	(232,091.13)	12.42
8820	MED ASSIS - TRANS & AD	0.00	0.00	(3,089.76)	0.00	3,089.76	0.00
	<b>Total</b>	<b>(265,000.00)</b>	<b>0.00</b>	<b>(35,998.63)</b>	<b>0.00</b>	<b>(229,001.37)</b>	<b>13.58</b>
9000							
9200							
9220	LEASE PROCEEDS	0.00	0.00	0.00	0.00	0.00	0.00
	<b>Total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
9300							
9330	Trans from Cap Reserve	0.00	0.00	0.00	0.00	0.00	0.00
	<b>Total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
9400	SALE OF ASSETS						
9400	SALE OF ASSETS	0.00	0.00	0.00	0.00	0.00	0.00
	<b>Total</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>MAJOR FUND 10 TOTALS</b>							
	<b>Total Expenditure</b>	<b>57,126,241.00</b>	<b>5,496,229.91</b>	<b>46,503,329.14</b>	<b>3,776,327.77</b>	<b>6,846,584.09</b>	<b>88.01</b>
	<b>Total Other Expenditure</b>	<b>2,163,204.00</b>	<b>0.00</b>	<b>2,044,631.00</b>	<b>0.00</b>	<b>118,573.00</b>	<b>94.52</b>
	<b>Total Revenue</b>	<b>(59,289,445.00)</b>	<b>0.00</b>	<b>(50,679,372.50)</b>	<b>0.00</b>	<b>(8,610,072.50)</b>	<b>85.48</b>
	<b>Total Other Revenue</b>	<b>0.00</b>	<b>(2,871,640.42)</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
		<b>0.00</b>	<b>2,624,589.49</b>	<b>(2,131,412.36)</b>	<b>3,776,327.77</b>	<b>(1,644,915.41)</b>	

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From 05/01/2024 To 05/31/2024

Summarization Level: MAJOR FUND/MAJOR FUNCTION/SUB FUNCTION/FULL FUNCTION

Grand Totals All Funds	Current Budget	PTD Exp/Rev	YTD Exp/Rev	YTD Outstanding Enc	Balance	YTD% Used
Total Expenditure	57,126,241.00	5,496,229.91	46,503,329.14 ✓	3,776,327.77	6,846,584.09	88.01
Total Other Expenditure	2,163,204.00	0.00	2,044,631.00 ✓	0.00	118,573.00	94.52
Total Revenue	(59,289,445.00)	(2,871,640.42)	(50,679,372.50) ✓	0.00	(8,610,072.50)	85.48
Total Other Revenue	0.00	0.00	0.00	0.00	0.00	0.00
	0.00	2,624,589.49	(2,131,412.36)	3,776,327.77	(1,644,915.41)	

**Saucon Valley School District  
Textbook/Program Adoption**

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<b>Course(s):</b>	Science 6, Science 7, Science 8
<b>Title:</b>	OpenSciEd/Activate Learning
<b>Author(s):</b>	<b>OpenSciEd, 2024</b>
<b>Year:</b>	Start of 2024-2025 school year

**Recommendations for Approval**

<b>Building Principal:</b>	Lensi Nikolov
<b>Department Chair Head Curriculum Writer:</b>	Raymond Baratta
<b>Curriculum Lead:</b>	Pamela Dobson

\_\_\_\_\_ **Date of School Board Action**

# Saucon Valley School District | Textbook/Program Review & Recommendation

## Department Committee

Reason for textbook/materials replacement (select one from dropdown): **Curriculum** ▾

Printed Name	Signature	Date
Lensi Nikolov		
Michael Sakelarides		
Raymond Baratta		
Pamela Dobson		

### Purchasing Considerations:

Quotes	Program Materials	Digital Materials
<ul style="list-style-type: none"> <li><a href="#">1 year Activate Quote</a></li> </ul> Quantity/Licenses needed: <b>485</b>	Cost per kit : <b>\$350 - \$1,700</b> *dependant on unit  Cost per online companion: <b>NA</b> (interactive platform)	Cost per consumable workbook + online companion: <b>(1 year) \$12.00</b>

### Additional Texts/Programs for Review

Text/Program Title	Publisher	Copyright
<b>Amplify Science</b>	Amplify	2024
<a href="#">Science 6-8   Program Review   Committee Rubric</a>		

### Literacy Considerations:

Reading Level:	
Suitable for students in grade levels:	_____ Reading Specialist Signature

## Materials Adoption Rubric

1 = Low Rating    2 = Average Rating    3 = Highest Rating

A. Authorship	N/A	1	2	3	COMMENTS
Represents a range of experience, including college/university, reading specialists and school personnel.				X	
Includes field specific, recognized authors.				X	
The writing style/delivery of content is consistent with/or can be adjusted to the age level and interest of students.				X	
B. General Content					
The learning materials: audio, visual, tactile, digital are accessible to all learners.				X	Unit investigations are hands-on, include a variety of roles and group member functions; materials include a wide range of accessibility tools inside the digital platform.
The learning materials contain variety to appeal to individual student interests and needs.				X	Unit phenomena are varied, relevant and in curiosity, wonder, and exploration
Concepts/objectives are well developed and sequentially presented.				X	
Skills taught are sequenced appropriately, introduced carefully and reviewed regularly.				X	NGSX Storylines incorporate regular check-ins to the driving questions and building new findings into current understands
Objectives taught correlate with Common Core, PA Academic Core and district standards as well as the District Mission Statement and Beliefs.				X	Course objectives are aligned to NGSS standards, which correlate to PA STEELS
A table of contents, index, glossary and bibliography are provided.				X	
The textbook/digital online companion is aligned with the grade/course level scope and sequence as well as PA Academic, Common Core and District standards.				X	
C. Teacher Considerations					

Instructional manuals, guides and ancillary instructional materials accompany the textbook. This includes a student specific, interactive, online companion available to be purchased with the textbook.				X	
Options for Consideration: <ul style="list-style-type: none"> <li>• Hardcover text=student, handheld paper product</li> <li>• Digital access to adaptive learning software, Online Teacher Dashboard, Online Test Preparation.</li> </ul>				X	Open source nature of the program allows for multiple options for student consumables, teacher guides, and assessment platforms
The textbook integrates current best instructional strategies, (i.e., ISTE, NCTM, NCTE, P21), in the subject area.				X	Aligned to NGSS K-12 Science Framework, rated high quality by the <a href="#">Science Peer Review Panel</a> at NextGenScience
Software support is available from the publisher.				X	Not from publisher directly, but from third party vendors, Activate, as an example
Graphics, animations and video content are compatible with district devices and software, (Learning Management System).				X	HTML5 compatible, deployable via Google Drive, Schoology, or Activate student/teacher dashboard
Review and practice activities utilize adaptive learning analytics and data to enhance student engagement.	X				Formative assessment data related to the three dimensions of science relies heavily on qualitative data as opposed to quantitative, variety of options for capturing progression towards mastery including traditional multiple choice and open ended response questions (if desired)
The textbook and supporting materials include activities for adaptive learning support to meet the needs of all learners: including, but not limited to acceleration, remediation, ESL.				X	“Attending to Equity” and “Supporting Students” notes throughout teacher guide, specific calls out to Universal Design for Learning embedded within program design
All learning materials are differentiated to meet the needs of all learners.			X		Does not explicitly call out a Tiered Lesson Design, Designed with an inclusion model Guidance offered at the end of the unit for connecting learning to other content areas, extension prompts students to ask and answer their own driving questions using the learned 3D process
Assessment components accompany the textbook.				X	No formal textbook, assessment components are embedded within the program materials, rubrics provided for student assessing 3D Science Engineering Practices, INSIGHT assessment component available for more traditional assessments builders
The textbook and supporting materials provide resources for reinforcement and/or enrichment activities.			X		Not explicitly, implicitly teachers can move students back through steps, procedures, or thinking to reinforce, additionally teachers can extend thinking

					by engaging students in their own experiments or student-led phenomena
Specific suggestions and strategies for differentiation to meet the needs of varying student ability are included.			X		Designed for accessibility, not tiered instruction
The textbook facilitates 21st century learning strategies, instructional design, and learning objectives				X	K-12 Science Framework relies heavily on collaboration, communication, critical thinking, and sense making to access 3D science learning
The goals and objectives of the textbook are in keeping with the District Mission Statement and course/grade level objectives.				X	
<b>D. Student Considerations</b>					
The size and weight of the textbook is convenient for student use.				X	Varied applications; Students can build a Science Notebook, access to student consumable workbook, or digital workbook
The textbook is durable.				X	Traditional paper-based Science Notebook, durable consumable and online option

The typeface in the title, heading and body copy is easy to read: adjustable font when using technology is available.				X	Online component offers font and font sizing options
Text layout is attractively displayed and reinforces content material.			X		
The overall organization of the textbook is easy to follow and contains interactive titling and/or hyperactive navigation linked to outside, online resources.				X	
Contains multiple means of presentation of information/skills to ensure student engagement.				X	Students create understanding using a variety of representations; modeling, charts, graphics, notes, drawings, etc.
Self-evaluation activities provide opportunities for personalized practice and reinforcement using program specific data analytics in real time.				X	Sense-making strategies, self evaluation rubrics provided
Content, including video, interactive components and resources are current and relate to real world learning.				X	
The content supports the development of college and career readiness.				X	
Attention is given to study skills that are needed in the content area.				X	Science and Engineering Practices; sense-making discussions, drawing, modeling and data analysis

Course/grade level vocabulary is accessible through interactive/ operating system reference tools.				X	Word Walls; Earned words versus learned words
Textbook features: hard copy and digital- promote understanding, provide application of skills in new contexts and provide personalized student feedback in real time.			X		Promotes understanding and application; understanding is developed through sense-making over time, less reliance on instant feedback
The textbook/program provides supplementary materials for independent reading.			X		Information text embedded in program; short articles, may need to supplement
The textbook and interactive, online companion strengthen and extend skills developed in each lesson.				X	SEP skills spiraled throughout course storylines
Assessment options are both evaluative and diagnostic in nature including: PSSA, Keystone, AP, SAT, ACT.				X	INSIGHT assessment provides PSSA, Keystone options for monitoring student mastery towards Performance Expectations
<b>E. Supplementary and Correlation Materials</b>					
Prior professional development is needed for teachers to integrate the textbook/online, integrative companion into the planning of teaching and learning practices.				X	Provided through the vendor but also through outside agencies like IUs, state and national conferences
The textbook is highly recommended by the professional organization of the content area, (i.e., NCTE, NCTM)				X	NGSS, validated by EdReports and NextGenScience

<b>Multicultural Considerations Rubric</b>					
1 = Low Rating      2 = Average Rating      3 = Highest Rating					
<b>A. Check the Illustrations</b>	<b>N/A</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>COMMENTS</b>
Look for overt stereotypes that may demean or misportray characters because of race, gender, religion, socio economic status, family heritage.				X	Explicit instruction and discussion considerations for words, phrases, prior understand that may be harmful or hurtful towards marginalized populations
Review the Author's or Illustrator's biographical background to ensure quality in portraying unbiased themes.				X	
Look for author objectivity.				X	
Look for Tokenism that may portray minorities as whites with darker tints to their skin or stereotypical features.				X	

<b>B. Check the Storyline</b>					
Look for standards of success to be equal for all races, genders, religions and socio economic levels.				X	
Problem resolution is accomplished equally by all. One race, gender, religion, or socio economic group is not dominant.				X	
The role and successes of women are recognized equally to that of men.				X	
<b>C. Look at Lifestyles</b>					
Look for inaccuracy and inappropriateness in the depiction of other cultures.				X	
<b>D. Relationships Between People</b>					
Does one race , gender, group possess more power than another?				X	
Are family units portrayed fairly and equally?				X	
<b>D. Note the Heroes</b>					
When minority heroes appear, ensure they are admired for the same qualities as majority heroes.				X	
<b>E. Consider Effects on Student Self Image</b>					
Look for norms that could limit a student's aspirations and self concept.				X	
Look for positive role models across minorities.				X	Highlights native/indigenous peoples, species, and recognizes contributions and knowledge of cultures and communities.
<b>F. Language/Text</b>					
Review language for biased overtones				X	
<b>G. Copyright Date</b>					

<p>Copyright dates may be an indicator of bias and inequity. (The copyright date is the year the book was published. It usually takes about 2 years from the submission of the manuscript to publication and placement for sale. In this time of rapid change in action and opinion, the timing of authorship may be of interest.)</p>				X	2022
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**ADDITIONAL COMMENTS:**

## DUAL CREDIT AGREEMENT

This dual credit agreement is entered into by and between \_Saucon Valley School District\_ hereafter referred to as the “School District”) and the University of Pittsburgh (hereafter referred to as the “College”). This agreement sets out the terms and conditions of the dual credit program offered by these two institutions in accordance with Article XVI of the Public School Code (hereafter “Program”).

The College and the School District do hereby agree to the following:

### 1. Term

The term of this agreement shall be from August 1, 2024\_ to June \_30, 2024\_.

### 2. Student Eligibility

A. Students who meet all of the following criteria are qualified to participate in the program:

- i. The student demonstrates a readiness for college-level coursework in the intended subject area of study, as determined by the School District.
- ii. The student is making satisfactory progress toward fulfilling applicable school graduation requirements, as determined by the School District
- iii. The student has scored at least a 4 on the AP Calculus exam in the intended subject area of study (Intro to Matrices and Linear Algebra) and 61 or higher and an algebra background or pre calculus for the intended coursework (Business Calculus). An ALEKS placement score of 61 or greater is needed for Business Calc no later than September 26<sup>th</sup>.

### 3. Courses Offered

The following criteria apply to all courses covered by this Agreement:

- A. The courses, as offered to dual credit students, are identical to those offered when dual credit students are not enrolled, including the use of an identical curriculum, assessments, and instructional materials.
- B. The courses enforce prerequisite coursework requirements identical to those offered when dual credit students are not enrolled.
- C. The courses can only be offered in the school in grades 9-12.
- D. The courses offered as well as the instructors shall be assessed annually by the parties.

The following courses shall be offered in accordance with the terms of this Agreement and Article XVI of the Public School Code:

*Course 1: MATH 0120: Business Calculus*

Location: Saucon Valley HS

Instructor: Carolyn Loverdi

College Credits: 4

Secondary credits/graduation requirement equivalent: 1 credits

Assessment: The College will assess the course for curricular alignment, and the School District will assess the instructor.

**A. Maximum number of dual credit students to be enrolled in this course in the fall 12.**

B. Total approved cost per student for this course: \$ \_652.00\_\_\_\_\_

- i. Allowable tuition \$ \_75.00 per credit\_\_\_\_\_
- ii. Books \$ \_332.00\_\_\_\_\_
- iii. Fees \$ \_\_\_\_\_20.00\_\_

Course 2: MATH 0280: Intro. to Matrices & Linear Algebra

Location: \_\_\_\_\_SVHS\_\_\_\_\_

Instructor: \_\_\_\_\_Carolyn LoVerdi\_\_\_\_\_

College Credits: 3\_\_

Secondary credits/graduation requirement equivalent: 1

Assessment: The College will assess the course for curricular alignment, and the School District will assess the instructor.

A. Maximum number of dual credit students to be enrolled in this course in the fall \_\_\_ 12\_\_

B. Total approved cost per student for this course: \$ \_510.00\_\_\_\_\_

- i. Allowable tuition \$ \_75.00 per credit\_
- ii. Books \$ \_285.00\_\_

**4. Student Credit**

The University of Pittsburgh will award postsecondary credit to students who successfully complete courses identified in this Agreement as identified above. The University of Pittsburgh will transcript this credit in a manner similar to other students who take a course at this institution. If a dual credit student becomes a regularly enrolled student at the University of Pittsburgh following graduation from secondary school, the University of Pittsburgh shall recognize those credits as applying to the student's degree requirements as it would for any regularly enrolled postsecondary student who took the courses.

The School District will award credit for and recognize courses that are successfully completed under this Agreement as fulfilling the graduation requirements identified above.

**5. Promotional Material**

Both the College and the School District agree to provide a mechanism for communicating the educational and economic benefits of higher education as well as the requirements for participation and enrollment procedures for dual credit to parents and students.

The School District will commit to displaying information on the University of Pittsburgh in the counseling suite.

## **6. Additional Administrative Responsibilities**

The following people will be responsible for the tasks listed below:

A. Registration: The University of Pittsburgh will supply teachers with the necessary course registration materials by September 1st for the school year.

B. Fiscal Transactions: Students and parents will be responsible to pay all applicable tuition costs directly to the University of Pittsburgh. The University will determine the timeline and the deadline for all payments.

C. Textbooks: University of Pittsburgh commits to using the same textbook in the course for two-year periods, as long as the textbooks are being used in any sections of the dual credit course.

D. Nondiscrimination: No party hereunder shall discriminate on the basis of disability, race, color, religion, national origin, ancestry, genetic information, marital status, familial status, sex, age, sexual orientation, veteran status or gender identity and expression in its programs and activities.

E. Student Privacy: Each party agrees to treat exchange student's personally identifiable information and educational records with the same standard of care with which it treats its own student's personally identifiable information and educational records. Each party hereunder shall comply with applicable laws related to the protection and disclosure of student personal information and student educational records, including but not limited to the Family Educational Rights and Privacy Act and each party agrees to cooperate with the other in complying with such applicable laws.

F. The parties agree to cooperate in the provision of disability related accommodations for students. Students requesting accommodations should be directed to the University of Pittsburgh's Disability Resources and Services (DRS) and in the School District should be directed to:

G. Each party appoints the following individuals as the primary contacts for the implementation of this Agreement:

For the University:

Michael Giazzoni, PhD, Director.  
College in High School (CHS)  
Email: giazzoni@pitt.edu  
(412) 624-6789.

For the District:

Mrs. Jaime L. Vlasaty, Superintendent  
Saucon Valley School District  
Email: jaime.vlasaty@svpanthers.org  
610.838.7001

## Signature Page

For the School District:

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Superintendent

Date

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President, Board of School Directors

Date

For the College:

DocuSigned by:  
*Pat Cunningham*  
4533C8EE7C4948A...

06-20-2024 | 3:02 PM EDT

Patrick Cunningham, Date  
Executive Director for Financial and Physical Resources

## **Saucon Valley School District**

### Policy

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Title – 805.1 Relations with Law Enforcement Agencies

Section – 800 Operations

Adopted –

Revised –

Content

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#### **Purpose**

The Board recognizes that cooperation with law enforcement agencies is considered essential for protecting students and staff, maintaining a safe environment in schools, and safeguarding district property.

#### **Authority**

It shall be the policy of the Board to establish and maintain a cooperative relationship between the school district and law enforcement agencies with jurisdiction over school property of the school district ~~local police departments~~ in **maintaining school safety and security; responding to school safety and security reports; and** reporting and resolution of incidents that occur on school property, at any school-sponsored activity, or on any conveyance providing transportation to or from a school or school-sponsored activity. [\[1\]](#)[\[2\]](#)[\[3\]](#)[\[4\]](#)[\[5\]](#)

The Board directs the Superintendent to execute and update, on a biennial basis, a memorandum of understanding with each law enforcement agency ~~local police department~~ that has jurisdiction over school property in accordance with state law and regulations. [\[1\]](#)[\[2\]](#)[\[65\]](#)

#### **Definition**

**Incident** - an instance involving an act of violence; the possession of a weapon by any person; the possession, use, or sale of a controlled substance or drug paraphernalia as defined in the Pennsylvania Controlled Substance, Drug, Device and Cosmetic Act; the possession, use, or sale of alcohol or tobacco products by any person on school property; or conduct that constitutes an offense listed in the school safety and security

provisions of School Code under the Safe Schools Act. [2][6][7][2][7][8][9][10][11][12][13][14][15][16]

## Guidelines

### Memorandum of Understanding

In accordance with state law and regulations, the Superintendent shall form an advisory committee composed of relevant school staff to assist in the development of a memorandum of understanding with law enforcement. The Superintendent shall execute and update, every two (2) years, a memorandum of understanding with each law enforcement agency local police department that has jurisdiction over school property. The memorandum of understanding shall be signed by the Superintendent, police chief of police of the law enforcement agency with jurisdiction over the relevant school property and each building principal, and be filed with the PA Department of Education Office for Safe Schools. [1][2][5][6]

In developing and updating the memorandum of understanding, the district shall consult and consider the State Board of Education model memorandum of understanding, in accordance with applicable law and regulations. [1][2][6]

If the district's memorandum of understanding with local law enforcement contains substantive differences from the State Board of Education model memorandum of understanding, the Superintendent shall provide a written statement which identifies the differences and the reasons for the differences as part of the biennial filing with the Office for Safe Schools. [2][5]

~~The memorandum of understanding shall comply with state law and regulations and set forth procedures to be followed regarding incidents that include, but are not limited to, acts of violence, weapons, terroristic threats, controlled substances, alcohol and tobacco.~~ [8][9][10][11][12]

~~The memorandum of understanding may specify other matters related to crime prevention mutually agreed upon by the Superintendent and the local police department that has jurisdiction over the school property.~~ [2]

The memorandum of understanding shall comply with state law and regulations and set forth: [1][2][6]

1. A procedure for law enforcement agency review of the district's annual incident report required by law, prior to the Superintendent filing the report with the PA Department of Education.
2. A procedure for the resolution of incident data discrepancies in the report prior to filing the report.
3. Additional matters pertaining to crime prevention agreed to between the Superintendent and the law enforcement agency.

4.

Students With Disabilities

The district shall provide a copy of its administrative regulations and procedures for behavior support, developed in accordance with the Special Education Plan, to each law enforcement agency ~~local police department~~ that has jurisdiction over school property. Updated copies shall be provided each time the administrative regulations and procedures for behavior support are revised by the district. ~~[13][14][15][16][17][18][19][20]~~

The district shall invite representatives of each law enforcement agency ~~local police department~~ that has jurisdiction over school property to participate in district training on the use of positive behavior supports, de-escalation techniques and appropriate responses to student behavior that may require intervention, as included in the district's Special Education Plan and positive behavior support program. ~~[13][14][15][16][17][17][18][19][20][21]~~

**{ } Training**

**{ } The district shall invite representatives of each law enforcement agency ~~local police department~~ that has jurisdiction over school property to participate in district training related to subjects that enhance understanding of and build positive relationships with students, which may include but not be limited to training on trauma-informed approaches, restorative practices, suicide awareness and prevention, child abuse recognition and reporting, maintaining confidentiality of students' personally identifiable information and maintaining professional adult/student boundaries. ~~[18][19][20][21][22][23][4][22][23][24][25][26][27]~~**

[HJJ1]

Referral to Law Enforcement

The Superintendent or designee shall immediately report required incidents and may report discretionary incidents committed on school property, at any school-sponsored activity or on a conveyance providing transportation to or from a school or school-sponsored activity, to the law enforcement agency ~~local police department~~ that has jurisdiction over the school's property, in accordance with state law and regulations, the procedures set forth in the memorandum of understanding with local law enforcement and Board policies. ~~[1][2][67][8][9][10][11][12][13][14][15][16][24][25][26][27][20][28][29][30][31]~~

School Safety and Security Incidents ~~Safe Schools Report~~

Annually, by July 31, the Superintendent shall report on the designated form, to the PA Department of Education ~~Office for Safe Schools~~, all new incidents as required by state law. ~~[2]~~

Prior to submitting the Safe Schools incident report, the Superintendent and each law enforcement agency police department having jurisdiction over school property shall do all of the following:<sup>[2]</sup>

1. No later than thirty (30) days prior to the deadline for submitting the Safe Schools report to the PA Department of Education Office for Safe Schools, the Superintendent shall submit the report to the law enforcement agency police department that has jurisdiction over the relevant school property. The law enforcement agency police department shall review the report and compare the data regarding criminal offenses and notification of law enforcement to determine whether the report accurately reflects law enforcement police incident data.
  
2. No later than fifteen (15) days prior to the deadline for the Superintendent to submit the report to the Pa Department of Education, Office for Safe Schools, the law enforcement agency police department shall notify the Superintendent, in writing, whether the report accurately reflects police incident data. Where the police department determines that the report accurately reflects law enforcement police incident data, the chief of police shall sign the report. Where the law enforcement agency police department determines that the report does not accurately reflect law enforcement police incident data, the police department law enforcement agency shall indicate any discrepancies between the report and law enforcement agency police incident data.
  
- 2.3. Prior to submitting the report to the PA Department of Education, the Superintendent and the law enforcement agency shall attempt to resolve any discrepancy between the report and law enforcement incident data. If a discrepancy remains unresolved, the law enforcement agency shall notify the Superintendent and the PA Department of Education in writing.
  
- 3.4. Where a law enforcement agency police department fails to take action as required above, the Superintendent shall submit the report to the Pa Department of Education Office for Safe Schools and indicate that the law enforcement agency police department failed to take the required action.

#### Legal References

1. 24 P.S. 1306.2-B
2. 24 P.S. 1319-B
3. 22 PA Code 10.1
4. Pol. 805
5. Pol. 805.2
6. 22 PA Code 10.11

7. 22 PA Code 10.2  
8. 35 P.S. 780-102  
9. Pol. 218  
10. Pol. 218.1  
11. Pol. 218.2  
12. Pol. 222  
13. Pol. 227  
14. Pol. 323  
15. Pol. 351  
16. Pol. 904  
17. 22 PA Code 10.23  
18. 22 PA Code 14.104  
19. Pol. 113  
20. Pol. 113.2  
21. 22 PA Code 14.133  
22. Pol. 113.4  
23. Pol. 216  
24. Pol. 333  
25. Pol. 806  
26. Pol. 819  
27. Pol. 824  
28. 22 PA Code 10.21  
29. 22 PA Code 10.22  
30. Pol. 103.1  
31. Pol. 113.1  
22 PA Code 10.24  
75 Pa. C.S.A. 3345.1  
Pol. 909

1. 22 PA Code 10.1  
2. 24 P.S. 1303-A  
3. Pol. 805  
4. Pol. 805.2  
5. 22 PA Code 10.11  
6. 22 PA Code 10.2  
7. 35 P.S. 780-102

8. Pol. 218
9. Pol. 218.1
10. Pol. 218.2
11. Pol. 222
12. Pol. 227
13. 22 PA Code 10.23
14. 22 PA Code 14.104
15. Pol. 113
16. Pol. 113.2
17. 22 PA Code 14.133
18. Pol. 113.4
19. Pol. 216
20. Pol. 333
21. Pol. 806
22. Pol. 819
23. Pol. 824
24. 22 PA Code 10.21
25. 22 PA Code 10.22
26. 24 P.S. 1302.1-A[HJJ2][DB3][HJJ4]
27. Pol. 103.1
28. Pol. 113.1
29. Pol. 323
30. Pol. 351
31. Pol. 904
- 22 PA Code 10.24
- Pol. 909

## **Saucon Valley School District**

### Administrative Regulation

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Title – 805.1-AR-0 Incident Report – Immediate Notification

Section – 800 Operations

Adopted –

Revised –

Content

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The Superintendent or designee, including the School Safety and Security Coordinator, building principals, administrators, school safety and security personnel or district employees in charge of school field trips, will immediately report, as required, incidents committed by students on school property, at any school-sponsored activity or on a conveyance providing transportation to or from a school or school-sponsored activity to the **law enforcement agency** that has jurisdiction over the school's property or the property where the school-sponsored activity takes place, in accordance with state law and regulations and with the procedures set forth in the memorandum of understanding with law enforcement.

**Incident** - an instance involving an act of violence; the possession of a weapon by any person; the possession, use or sale of a controlled substance or drug paraphernalia as defined in the Pennsylvania Controlled Substance, Drug, Device and Cosmetic Act; the possession, use or sale of alcohol or tobacco **products** by any person on school property; or conduct that constitutes an offense listed **in the school safety and security provisions of School Code. (24 P.S. Sec. 1319-B)**

Incidents involving the following criminal offenses will require immediate notification to the **law enforcement agency**:

1. The following offenses under 18 Pa. C.S. (relating to crimes and offenses):
  - a. Section 908 (relating to prohibited offensive weapons).
  - b. Section 912 (relating to possession of weapon on school property).
  - c. Chapter 25 (relating to criminal homicide).
  - d. Section 2702 (relating to aggravated assault).
  - e. Section 2709.1 (relating to stalking).
  - f. Section 2901 (relating to kidnapping).

- g. Section 2902 (relating to unlawful restraint).
  - h. Section 3121 (relating to rape).
  - i. Section 3122.1 (relating to statutory sexual assault).
  - j. Section 3123 (relating to involuntary deviate sexual intercourse).
  - k. Section 3124.1 (relating to sexual assault).
  - l. Section 3124.2 (relating to institutional sexual assault).
  - m. Section 3125 (relating to aggravated indecent assault).
  - n. Section 3126 (relating to indecent assault).
  - o. Section 3301 (relating to arson and related offenses).
  - p. Section 3307 (relating to institutional vandalism) when the **offense** is a felony of the third degree.
  - q. Section 3502 (relating to burglary).
  - r. Section 3503(a) and (b)(1)(v) (relating to criminal trespass).
  - s. Section 5501 (relating to riot).
  - t. Section 6110.1 (relating to possession of firearm by minor).
2. The possession, use or sale of a controlled substance or drug paraphernalia as defined in The Controlled Substance, Drug, Device and Cosmetic Act.
  3. Attempts, solicitation or conspiracy to commit any of the offenses listed in 1 and 2 above.
  4. An offense for which registration is required under 42 Pa. C.S. Sec. **9799.55** (relating to registration).

Notification will be made to the **law enforcement agency** by the most expeditious means practicable, which may include a phone call.

In notifying the **law enforcement agency** of the incident, the Superintendent or designee will provide as much of the following information as is available at the time of the notification; however, the gathering of this information **should** not unnecessarily delay notification:

1. Whether the incident is in-progress or has concluded.
2. Nature of the incident.

3. Exact location of the incident.
4. Number of persons involved in the incident.
5. Names and ages of the individuals involved.
6. Weapons, if any, involved in the incident.
7. Whether the weapons, if any, have been secured and, if so, the custodian of the weapons.
8. Injuries, if any.
9. Whether emergency medical services or the fire department were notified.
10. Identity of the school contact person.
11. Identity of the witnesses, if any.
12. Whether the incident involves a student with a disability and, if so, the type of disability and its impact on the student's behavior.
13. Other such information as is known to the school district and believed to be relevant to the incident.

{→} In responding to students who commit an incident listed above, the district may consider using available school-based diversion programs, including school-wide positive behavior supports, to address the student's behavior and will notify the **law enforcement agency** of the student's placement in the program.

The Superintendent or designee will also notify the parent/guardian of any student directly involved in an incident as a victim or suspect immediately, as soon as practicable. The Superintendent or designee will inform the parent/guardian whether or not the **law enforcement agency** has been or may be notified of the incident. The Superintendent or designee will document attempts made to reach the parent/guardian.

#### Required Reporting

The Superintendent or designee will comply with all applicable reporting requirements, including mandated reporting in accordance with the Child Protective Services Law and submission of the **annual school safety and security incident report to the PA Department of Education**, in accordance with applicable law, regulations and Board policies.

## **Saucon Valley School District**

### Administrative Regulation

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Title – 805.1-AR-1 Incident Report – Discretionary Notification

Section – 800 Operations

Adopted –

Revised –

Content

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The Superintendent or designee, including the School Safety and Security Coordinator, building principals, administrators, school safety and security personnel or district employees in charge of school field trips, will use their discretion and may report specified incidents committed by students on school property, at any school-sponsored activity or on a conveyance providing transportation to or from a school or school-sponsored activity to the **law enforcement agency** that has jurisdiction over the school's property or the property where the school-sponsored activity takes place, in accordance with state law and regulations and with the procedures set forth in the memorandum of understanding with law enforcement.

**Incident** - an instance involving an act of violence; the possession of a weapon by any person; the possession, use or sale of a controlled substance or drug paraphernalia as defined in the Pennsylvania Controlled Substance, Drug, Device and Cosmetic Act; the possession, use or sale of alcohol or tobacco **products** by any person on school property; or conduct that constitutes an offense listed **in the school safety and security provisions of School Code. (24 P.S. Sec. 1319-B).**

Incidents involving the following criminal offenses may be reported to the **law enforcement agency**:

1. The following offenses under 18 Pa. C.S., and any attempt, solicitation or conspiracy to commit any of these offenses:
  - a. Section 2701 (relating to simple assault).
  - b. Section 2705 (relating to recklessly endangering another person).
  - c. Section 2706 (relating to terroristic threats).
  - d. Section 2709 (relating to harassment).
  - e. Section 3127 (relating to indecent exposure).

- f. Section 3307 (relating to institutional vandalism) when the penalty is a misdemeanor of the second degree.
- g. Section 3503(b)(1)(i), (ii), (iii) and (iv), (b.1) and (b.2) (relating to criminal trespass).
- h. Chapter 39 (relating to theft and related offenses).
- i. Section 5502 (relating to failure of disorderly persons to disperse upon official order).
- j. Section 5503 (relating to disorderly conduct).
- k. Section 6305 (relating to sale of tobacco **products**).
- l. Section 6306.1 (relating to use of tobacco **products** in schools prohibited).
- m. Section 6308 (relating to purchase, consumption, possession or transportation of liquor or malt or brewed beverages).

In determining whether to notify the **law enforcement agency** of an incident, the Superintendent or designee may consider the following factors:

1. The seriousness of the situation.
2. The school's ability to defuse or resolve the situation.
3. The student's intent.
4. The student's age.
5. Whether the student has a disability and, if so, the type of disability and its impact on the student's behavior.
6. Other factors believed to be relevant.

{→} In making a determination of whether to notify the **law enforcement agency** of an incident listed above, and to the extent the district has the authority, the district may consider using available school-based diversion programs and available school-wide positive behavior supports to address the student's behavior.

In notifying the **law enforcement agency** of the incident, the Superintendent or designee will provide as much of the following information as is available at the time of the notification; however, the gathering of this information **should** not unnecessarily delay notification:

1. Whether the incident is in-progress or has concluded.
2. Nature of the incident.

3. Exact location of the incident.
4. Number of persons involved in the incident.
5. Names and ages of the individuals involved.
6. Weapons, if any, involved in the incident.
7. Whether the weapons, if any, have been secured and, if so, the custodian of the weapons.
8. Injuries, if any.
9. Whether emergency medical services or the fire department were notified.
10. Identity of the school contact person.
11. Identity of the witnesses, if any.
12. Whether the incident involves a student with a disability and, if so, the type of disability and its impact on the student's behavior.
13. Other such information as is known to the school district and believed to be relevant to the incident.

The Superintendent or designee will also notify the parent/guardian of any student directly involved in an incident as a victim or suspect immediately, as soon as practicable. The Superintendent or designee will inform the parent/guardian whether or not the **law enforcement agency** has been or may be notified of the incident. The Superintendent or designee will document attempts made to reach the parent/guardian.

### **Required Reporting**

The Superintendent or designee will comply with all applicable reporting requirements, including **mandated reporting in accordance with the Child Protective Services Law** and submission of the **annual school safety and security incident report to the PA Department of Education**, in accordance with applicable law, regulations and Board policies.

## **Saucon Valley School District**

### Administrative Regulation

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Title – 805.1-AR-2 Record of Law Enforcement Officers in School

Section – 800 Operations

Adopted –

Revised –

Content

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In the event outside law enforcement personnel, other than a School Resource Officer(s) or school security personnel, are engaged with student(s) or staff on school property, the building principal will ensure the Superintendent or designee is notified and record the following information as applicable and appropriate:

1. Date.
2. Building.
3. Officer name, rank, agency.
4. Time of Officer's arrival.
5. Type of Court Order presented, if applicable.
6. Name(s) of student(s)/staff involved.
7. Nature of incident, if known.
8. Time parent/guardian notified, if applicable, and who contacted the parent/guardian.
9. Persons present during the interview.
10. Place interview was held.
11. Reason for interview, if known.
12. If student/staff was removed from school, including time.
- 13. Witness(es) present, where applicable.**

School personnel will cooperate with law enforcement **agencies** and will not impede their actions or investigations. **The Superintendent or designee will contact the**

**school solicitor, when necessary, to address questions or concerns regarding interactions with law enforcement officers.**

School security personnel, including School Resource Officer(s), operating under Board policy will comply with requirements of Board policy, **administrative regulations** and procedures.

## Saucon Valley School District

Policy

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Title – 805.2 School Security Personnel

Section – 800 Operations

Adopted –

Revised –

Content

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### **Authority**

The Board shall employ, contract for and/or assign staff to coordinate the safety and security of district students, staff, visitors and facilities.

### **Definitions**

**Independent contractor** – for the purposes of this policy, an individual, including a retired federal agent or retired state, municipal or military police officer or retired sheriff or deputy sheriff, whose responsibilities, including work hours, are established in a written contract with the district for the purpose of performing school security services.[1]

~~**School security personnel** – school police officers, school resource officers and school security guards.[1]~~

=

**School police officer** - [1][224][232]

=

1. A law enforcement officer employed by the district whose responsibilities, including work hours, are established by the district; or
2. An independent contractor or an individual provided through a third-party vendor who has been appointed in accordance with law, and who meets the requirements of contracted services personnel, in accordance with Board policy.[254]

School Resource Officer (SRO) - a law enforcement officer commissioned and employed by a law enforcement agency whose duty station is located in the district and whose stationing is established by an agreement between the law enforcement agency and the district. The term includes an active certified sheriff or deputy sheriff whose stationing in the district is established by a written agreement between the county, the sheriff's office and the district.[1]

School security guard - an individual employed by the district or a third-party vendor or an independent contractor who is assigned to a school for routine safety and security duties, and has not been granted powers by the court to issue citations, detain individuals or exercise the same powers as exercised by police of the municipality in which the school property is located, in accordance with law. An independent contractor or individual employed by a third-party vendor contracted with the district shall meet the requirements of contracted services personnel, in accordance with Board policy and the provisions of applicable law.[1][232][254][465]

School security personnel - school police officers, school resource officers and school security guards.[1]

~~Independent contractor - an individual, including a retired federal agent or retired state, municipal or military police officer or retired sheriff or deputy sheriff, whose responsibilities, including work hours, are established in a written contract with the district for the purpose of performing school security services.[1]~~

~~Third-party vendor - a company or entity approved by the Office for Safe Schools of the PA Department of Education or the PA Commission on Crime and Delinquency that provides school security services in accordance with law.[1]~~

### **Delegation of Responsibility**

The Superintendent shall appoint a school administrator to serve as the School Safety and Security Coordinator, in accordance with law. **When a vacancy occurs in the role of the School Safety and Security Coordinator, the Superintendent shall appoint another school administrator to serve as the School Safety and Security Coordinator within thirty (30) days of the vacancy and shall notify the Board regarding the appointment.[2]**

**The Superintendent or designee shall submit the name and contact information for the appointed School Safety and Security Coordinator to the state's School Safety and Security Committee within thirty (30) days of the appointment.[2]**

The School Safety and Security Coordinator shall report directly to the Superintendent, and shall be responsible for the following:[2]

1. **Oversee all**

{ } school police officers

{ } School Resource Officers (SROs)

{ } school security guards.

[HJJ1]

2. Review and provide oversight of all Board policies, administrative regulations and procedures related to school safety and security, and ensure compliance with federal and state laws and regulations regarding school safety and security.
3. Coordinate training and resources for students and staff related to situational awareness, trauma-informed approaches, behavioral health awareness, suicide and bullying **awareness**, substance **use awareness**, emergency procedures and training drills, **and identification or recognition of student behavior that may indicate a threat to the safety of the student, other students, school employees, other individuals, school facilities or the community, in accordance with the standards established by the state's School Safety and Security Committee and the requirements of applicable law and regulations.**[3][4][5][6][7][8][9][10][11][12]
4. Coordinate a tour of the district's buildings and grounds biennially, or when a building is first occupied or reconfigured, with law enforcement and first responders responsible for protecting and securing the district to discuss and coordinate school safety and security matters.
5. Serve as the liaison with law enforcement and other state committees and agencies on matters of school safety and security.
6. Serve on the district's threat assessment team(s) and participate in required training and the threat assessment process.[6][132]
7. Coordinate School Safety and Security Assessments, **School Safety and Security grant requirements** and respond to School Safety and Security surveys, as applicable.[10][13][14][15]

**The School Safety and Security Coordinator shall, within one (1) year of appointment, complete required training as specified by the state's School Safety and Security Committee for serving in the role of a School Safety and Security Coordinator. This training shall be in addition to other training requirements for school administrators, but shall count toward professional education credit, where applicable.** [2][15][16][17]

By June 30 of each year, the School Safety and Security Coordinator shall make a report to the Board at an executive session on the district's current safety and security practices, and identify strategies to improve school safety and security.[2][187]

The Board directs the School Safety and Security Coordinator to include the following information in the annual report:

1. Threat assessment team information, including verification of compliance with law and regulations, the number and composition of the district's threat assessment team(s), the total number of threats assessed in the past year and **additional** information on threat assessment required by the Superintendent or designee, in accordance with Board policy.[6][132]
2. {} Reports of required emergency preparedness, fire, bus evacuation and school security drills.[10]
3. {} Information on required school safety and security training and resources provided to students and staff.[10]
4. {} Safe2Say Something aggregate data, including a breakdown of Life Safety and Non-Life Safety reports received.
5. {} Behavioral health and school climate information, including aggregate data from surveys and assessments issued in the district, information on referrals and services accessed by students and families, and identification of additional resources needed in the district.[198]
6. {} **School safety and security incident** ~~Office for Safe Schools~~ reports for the previous year(s) and/or data collected to date for the current year.[20]
7. {} Updates regarding the district's Memorandum of Understanding with local law enforcement agencies.[1920]
8. {} Updates to laws, regulations and/or Board policies related to school safety and security.
9. {} Information on tours, inspections and/or School Safety and Security Assessments of school facilities and programs.
10. {} Information on grants or funding applied for and/or received in support of school safety and security efforts.[HJJ2]

A copy of the report shall be submitted to the state's School Safety and Security Committee.<sup>[2]</sup>

The Superintendent or designee shall implement job descriptions and procedures to address the responsibilities and requirements specific to each category of school security personnel in carrying out their duties.

School security personnel shall carry weapons, including firearms, in performance of their duties only if, and to the extent, authorized by the Board, including as provided in an agreement with a law enforcement agency for the stationing of a School Resource Officer or in a contract with an independent contractor or third-party vendor approved by the Board.

~~[NOTE: Select the applicable option(s) below with the appropriate corresponding language for each option, based on the district's school security personnel.]~~

### Guidelines

School Police Officers<sup>[HJJ3]</sup>

The district shall

employ

contract for

one or more school police officers and apply to the appropriate court for appointment and powers of authority, in accordance with the provisions of law.<sup>[1][20][21][22][23][24][25]</sup>

Within thirty (30) days of court approval for appointment of a school police officer, the district shall notify the School Safety and Security Committee and submit a copy of the court's order.<sup>[21]</sup>

~~School police officer~~ <sup>[1][21][22]</sup>

~~1. A law enforcement officer employed by the district whose responsibilities, including work hours, are established by the district; or~~

~~2.1. An independent contractor or an individual provided through a third-party vendor who has been appointed in accordance with law, and who meets the requirements of contracted services personnel, in accordance with Board policy.~~<sup>[24]</sup>

### *Background Checks -*

Prior to receiving an offer of employment, all school police officers shall comply with the requirements for background checks/certifications and employment history reviews for all school employees, in accordance with applicable law, Board policy and administrative regulations. These requirements are addressed separately in Board policy 304 for school police employed by the district and Board policy 818 for school police employed by an independent contractor or third-party vendor. [23][24][25][26][27][28][29]

The district shall conduct a law enforcement agency background investigation in compliance with applicable law and regulations for all school police employed by the district and shall review a background investigation conducted for all school police employed by an independent contractor or third-party vendor. [29][30][31]

Following an offer of employment, the district shall request the separation record for a school police officer employed or contracted by the district, in accordance with applicable law and regulations for a law enforcement agency. [31][32][33]

### *Requirements -*

The district shall annually report the following information regarding school police officers receiving required training to the PA Department of Education, the School Safety and Security Committee and the PA Commission on Crime and Delinquency: [343]

1. The district's name and the number of school police officers employed or contracted by the district.
2. The municipalities comprising the district.
3. The date and type of training provided to each school police officer.

The district shall make reports regarding hiring and separation, and shall maintain all records, as required for a law enforcement agency, in accordance with applicable law and regulations. [310][354]

School police officers shall take and subscribe to the Oath of Office required by law. [365]

{ } The district shall request that the court grant the school police officer authority to carry a firearm, in accordance with law. The school police officer shall maintain all applicable firearm license and training requirements, in accordance with applicable law and Board policy. [210][376][HJJ4]

School police officers shall successfully complete required training, in accordance with law, and other required staff training, including district training on the use of positive behavior supports, de-escalation techniques and appropriate responses to behavior for students with disabilities, in accordance with law, regulations and Board policy. [36][37][38][39][40][41]

School police officers shall possess and exercise the following duties: [42]

1. Enforce good order in school buildings, on school buses or vehicles owned or leased by the district, and on school grounds.
2. If authorized by the court, issue summary citations or detain individuals who are in school buildings, on school buses and on school grounds in the district until local law enforcement is notified.
3. If authorized by the court, a school police officer who is a law enforcement officer employed by the district whose responsibilities, including work hours, are established by the district, may exercise the same powers as exercised under authority of law or ordinance by the police of the municipality in which the school property is located.

School police officers shall wear the assigned metallic shield or badge provided by the district in plain view when on duty [DB5][HJJ6]. [432]

#### { } School Resource Officers (SROs)

The district shall establish an agreement with \_\_\_\_\_, in accordance with the provisions of law, for the assignment of a School Resource Officer(s) to specified district schools. [1][43]

[HJJ7]

~~**School Resource Officer (SRO)** – a law enforcement officer commissioned and employed by a law enforcement agency whose duty station is located in the district and whose stationing is established by an agreement between the law enforcement agency and the district. The term includes an active certified sheriff or deputy sheriff whose stationing in the district is established by a written agreement between the county, the sheriff's office and the district. [1]~~

The agreement shall address the powers and duties conferred on SROs, which shall include but not be limited to: [44]

1. ~~Assist in identification of physical changes in the environment which may reduce crime in or around a school.~~
- 
2. ~~Assist in developing Board policy, administrative regulations or procedures which address crime, and recommending procedural changes.~~
- 
3. ~~Develop and educate students in crime prevention and safety.~~
- 
4. ~~Train students in conflict resolution, restorative justice and crime awareness.~~
- 
5. ~~Address crime and violence issues, gangs and drug activities affecting or occurring in or around a school.~~
- 
6. ~~Develop or expand community justice initiatives for students.~~
- 
7. ~~Other duties as agreed upon between the district and municipal agency.~~

~~Prior to assignment in the district, the district shall confirm that the law enforcement agency has completed a law enforcement agency background investigation and received the SRO's separation record, when required, in compliance with applicable law and regulations. The district shall coordinate with the law enforcement agency in making required reports regarding hiring and separation, and maintaining all required records, in accordance with applicable law and regulations. [30][34]~~

~~SROs shall successfully complete required training, in accordance with law. [44]~~

#### ~~{ } School Security Guards [HJJ8]~~

The district shall

~~{ } employ~~

~~{ } contract for~~

~~one or more school security guards, in accordance with the provisions of law. [1][23][24][25][465]~~

~~**School security guard**—an individual employed by the district or a third-party vendor or an independent contractor who is assigned to a school for routine safety and security duties, and has not been granted powers by the court to issue citations, detain individuals or exercise the same powers as exercised by police of the municipality in which the school property is located, in accordance with law. An independent contractor or individual employed by a third-party vendor contracted with the district shall meet the requirements of contracted services personnel, in accordance with Board policy and the provisions of applicable law. [1][22][24][45]~~

-  
*Background Checks –*

Prior to receiving an offer of employment, all school security guards shall comply with the requirements for background checks/certifications and employment history reviews for all school employees, in accordance with applicable law, Board policy and administrative regulations. These requirements are addressed separately in Board policy 304 for school security guards employed by the district and Board policy 818 for school security guards employed by an independent contractor or third-party vendor.[23][24][25][26][27][28][29]

The district shall conduct a law enforcement agency background investigation in compliance with applicable law and regulations for all school security guards employed by the district and shall review a background investigation conducted for all school security guards employed by an independent contractor or third-party vendor.[29][30][31]

Following an offer of employment, the district shall request the separation record for a school security guard employed or contracted by the district, in accordance with applicable law and regulations for a law enforcement agency.[32][33]

*Requirements -*

School security guards shall provide the following services, as directed by the district:[465]

1. School safety support services.
2. Enhanced campus supervision.
3. Assistance with disruptive students.
4. Monitoring visitors on campus.[476]
5. Coordination with law enforcement officials,  
{} including school police officers.  
  
{} including SROs:  
[HJJ9]
6. Security functions which improve and maintain school safety.

School security guards shall successfully complete required training, in accordance with law, and applicable staff training in accordance with Board policy.[465]

{ } School security guards authorized to carry a firearm shall maintain an appropriate license and successfully complete required firearm training in accordance with law. ~~465~~ [HJJ10]

The district shall make reports regarding hiring and separation, and shall maintain all records, as required for a law enforcement agency, in accordance with applicable law and regulations. ~~310~~ ~~354~~

~~{ } Other Agreements~~ [DB11] [HJJ12]

~~{ } The district shall enter into a cooperative police service agreement(s) with a municipality(ies), in accordance with the provisions of law.~~ ~~43~~ ~~47~~ ~~48~~ ~~49~~

~~{ } The district shall enter into an intergovernmental agreement(s) otherwise providing for School Resource Officers with other political subdivisions, in accordance with the provisions of law.~~ ~~43~~ ~~44~~ ~~49~~ [HJJ13]

#### Legal References

1. 24 P.S. 1301-C

2. 24 P.S. 1309-B

3. Pol. 146.1

4. Pol. 227

5. Pol. 236

6. Pol. 236.1

7. Pol. 249

8. Pol. 333

9. Pol. 351

10. Pol. 805

11. Pol. 819

12. 24 P.S. 1310-B

132. 24 P.S. 1302-E

143. 24 P.S. 1305-B

14. 24 P.S. 1314-B

15. 24 P.S. 1315-B

156. 24 P.S. 1316-B

16. 24 P.S. 1205.1

17. 24 P.S. 1205.5

187. Pol. 006

198. Pol. 235.1

2019. Pol. 805.1  
210. 24 P.S. 1302-C  
221. 24 P.S. 1310-C  
232. 24 P.S. 1311-C  
243. Pol. 304  
254. Pol. 818  
265. 24 P.S. 111  
276. 24 P.S. 111.1  
287. 23 Pa. C.S.A. 6344  
298. 23 Pa. C.S.A. 6344.3  
3029. 37 PA Code 241.5  
310. 44 Pa. C.S.A. 7301 et seq  
321. 37 PA Code 241.6  
332. 44 Pa. C.S.A. 7310  
343. 24 P.S. 1303-C  
354. 37 PA Code 241.1 et seq  
365. 24 P.S. 1304-C  
376. 24 P.S. 1305-C  
387. 22 PA Code 10.23  
398. 22 PA Code 14.104  
4039. 22 PA Code 14.133  
410. Pol. 113.2  
421. 24 P.S. 1306-C  
432. 24 P.S. 1307-C  
443. Pol. 909  
454. 24 P.S. 1313-C  
465. 24 P.S. 1314-C  
476. Pol. 907  
487. 24 P.S. 1309-C  
498. 42 Pa. C.S.A. 8953  
5049. 53 Pa. C.S.A. 2303  
24 P.S.. 1306.2-B  
24 P.S. 1319-B  
53 Pa. C.S.A. 2301 et seq  
Pol. 705  
Pol. 709

# Saucon Valley School District

## Consultant Services Agreement

The Saucon Valley School District, located in Hellertown, PA, agrees to retain the professional services of

**NAME : Ken Zimmerman**

**TELEPHONE : 610-297-5879**

**ADDRESS: 4904 Glenview Street, Schnecksville, PA 18078**

in the capacity of a consultant under the terms described below. Description of services to be performed and products to be delivered:

Drill Writer for the Saucon Valley High School Marching Band. Ken will have the responsibility of writing and arranging the 2024-2025 competition show for the Marching Band. This responsibility includes approximately 40+ pages of drill and movement for approximately 50-60 marchers and all revisions throughout the season.

Any materials, products, and reports that are produced by the consultant under the terms of this agreement are the sole property of the Saucon Valley School District. The consultant hereby assigns his entire right, title and interest in, to and under any copyrights to the materials, products and reports created pursuant to this Agreement, and the consultant agrees to sign any further documentation necessary to effectuate this assignment. The consultant agrees to assume all responsibility for gaining and delivering to Saucon Valley School District any necessary permissions to use materials produced by other individuals, agencies, and institutions which the consultant uses in carrying out the terms of this agreement. Further, any materials, products and reports of the Saucon Valley School District (including those materials, products, reports created pursuant to this Agreement), as well as any internal operations and activities of the school district, made known to the consultant through contact with the school district are privileged and confidential, and no use shall be made of them by the consultant without the expressed written consent of the school district. The consultant shall particularly refrain from publishing same without consent of the school district.

The consultant is an independent contractor and not an employee of Saucon Valley School District and, subject to the School District's satisfaction with the results of the consultant's services, the consultant shall determine his or her own method of operation in accomplishing the services to be performed and products to be delivered under this Agreement. The consultant will not be entitled to receive any other compensation or benefits other than those expressly provided in this Agreement. As an independent contractor, the consultant is not authorized to act for or on behalf of Saucon Valley School District.

Anticipated period of performance from July 2024 through June 2025.

## TERMS OF PAYMENT

1. Consultant will be compensated at the rate of \$2,000.00 for the 2024-2025 season.
2. Reimbursement for travel and other expenses will be made by the Saucon Valley School District as follows: as required and approved by the Superintendent; mileage at state rates; meals and lodging as per district policy.
3. Estimated total fees and expenses not to exceed \$2,000.00
4. Payment shall be processed by December 31st pending notification of completion of services to Robert Frey, Director of Student & Community Relation at Robert.Frey@svpanthers.org no later than December 1st.

Saucon Valley School District's obligation to compensate the consultant, and to reimburse him or her for incurred expenses, shall be conditioned upon the consultant's complete performance of the services described in this Agreement, and delivery of any and all products specified herein. Payment for services performed and expenses incurred will be made upon submission of consultant's invoice and appropriate supporting documents.

The consultant agrees to indemnify and save harmless Saucon Valley School District, its Board of School Directors and its employees from and against any and all claims, demands, losses, damages, liabilities, costs and expenses (including reasonable attorneys fees, expenses, and court costs) arising out of or resulting from any actions or inactions of the consultant.

I have reviewed the Saucon Valley School District's Consultant Services Agreement. I agree to provide the services described as per the stated conditions. I also understand that the Saucon Valley School District has the right to terminate these services for any reason, or no reason at all, at any time upon written notice to the consultant. In the event that the consultant should be terminated prior to the complete performance of the contract, consultant shall only be entitled to receive compensation for the services performed and expenses incurred prior to notice of termination, provided that the consultant has complied with the other terms and conditions of this Agreement.

Saucon Valley School District

Consultant

By \_\_\_\_\_  
**Board President**

By Ken Zimmerman

By \_\_\_\_\_  
**Superintendent**

Date 2024-06-14

Date \_\_\_\_\_

# Signature Certificate

Reference number: NGZZE-H2MUY-KRTDQ-YPDVF

## Signer

## Timestamp

## Signature

### Ken Zimmerman

Email: kzimmerman6157@gmail.com

Sent:

14 Jun 2024 16:22:10 UTC

Viewed:

14 Jun 2024 17:13:26 UTC

Signed:

14 Jun 2024 17:14:17 UTC

Ken Zimmerman

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Page 1 of 1



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## Facility Committee – June 12, 2024

The Saucon Valley School Board's Facility Committee met on May 8, 2024, at 5:00 p.m. in the District Office Conference Room.

The following items were on the Facility Committee agenda:

**Presentation:** Solar Energy by Provident Energy Consultants

**Update:** Future Projects – Mr. Deegan reviewed current projects.

The committee had no recommendations to make at this time.

Saucon Valley School District  
Office of the Assistant Superintendent

TO: David Bonenberger, Business Manager

FROM: Jaime Vlasaty, Assistant to the Superintendent

RE: Surplus / Obsolete Materials

SCHOOL: SVM S

Room Number: D112

*JAV*

Copyright Date	Publisher	Title/Series	Total
2002	Glencoe	Life Structure Function	60
2002	Glencoe	Bacteria to Plants	85+21=106
2002	Glencoe	Animal Diversity	110
2002	Glencoe	Life Structure Function	29
		Reading Essentials	
2002	Glencoe	Bacteria to Plants	
		Reading Essential	30
2002	Glencoe	Animal Diversity	40
		Reading Essentials	

Reason: *outdated / new curriculum*

Pick-up Location: D112

Principal's/Supervisor's Signature \_\_\_\_\_ Date \_\_\_\_\_

Assistant Superintendent Signature \_\_\_\_\_ Date \_\_\_\_\_

Office Use:

Date Declared \_\_\_\_\_

Date of Disposal \_\_\_\_\_

Picked Up By \_\_\_\_\_

Disposal Method \_\_\_\_\_

Saucon Valley School District  
Office of the Assistant Superintendent

TO: David Bonenberger, Business Manager

FROM: Jaime Vlasaty, Assistant to the Superintendent

RE: Surplus / Obsolete Materials

SCHOOL: *SVMS*

Room Number: *D112*



Copyright Date	Publisher	Title/Series	Total
<i>2003</i>	<i>Foss</i>	<i>Diversity of Life</i>	<i>2</i>
		<i>Unit Materials</i>	<i>sets</i>
<i>2003</i>	<i>Foss</i>	<i>Populations</i>	<i>2</i>
		<i>and Ecosystems</i>	<i>sets</i>
		<i>Unit Materials</i>	

Reason: *outdated*

Pick-up Location: *D112*

Principal's/Supervisor's Signature \_\_\_\_\_ Date \_\_\_\_\_

Assistant Superintendent Signature \_\_\_\_\_ Date \_\_\_\_\_

Office Use:

Date Declared \_\_\_\_\_

Date of Disposal \_\_\_\_\_

Picked Up By \_\_\_\_\_

Disposal Method \_\_\_\_\_

Saucon Valley School District  
Office of the Assistant Superintendent

TO: David Bonenberger, Business Manager

FROM: Jaime Vlasaty, Acting Superintendent

RE: Surplus / Obsolete Materials

SCHOOL: SVMS Room Number: D114

Description	Serial Number	Reason for Disposal	Total
Sunday kits & other related materials		out of date	3

Reason: D114 out of date

Pick-up Location: \_\_\_\_\_

Principal's/Supervisor's Signature [Signature] Date 6/7/24

Assistant Superintendent Signature \_\_\_\_\_ Date \_\_\_\_\_

Office Use:

Date Declared \_\_\_\_\_

Date of Disposal \_\_\_\_\_

Picked Up By \_\_\_\_\_

Disposal Method \_\_\_\_\_

Saucon Valley School District  
Office of the Assistant Superintendent

TO: David Bonenberger, Business Manager

FROM: Jaime Vlasaty, Acting Superintendent

RE: Surplus / Obsolete Materials

SCHOOL: SVMS

Room Number: D114

*JV*

Description	Serial Number	Reason for Disposal	Total
SLOESUN kits		) out of date	5
PARP			1
TOWL 3 bookless			set
Sunday Teacher book			1

Reason: Out of date

Pick-up Location: D114

Principal's/Supervisor's Signature Levi R. Date 6/7/24

Assistant Superintendent Signature \_\_\_\_\_ Date \_\_\_\_\_

Office Use:  
Date Declared \_\_\_\_\_ Date of Disposal \_\_\_\_\_  
Picked Up By \_\_\_\_\_ Disposal Method \_\_\_\_\_

Saucon Valley School District  
Office of the Assistant Superintendent

TO: David Bonenberger, Business Manager

FROM: Jaime Vlasaty, Acting Superintendent

RE: Surplus / Obsolete Materials

SCHOOL: *SVMS*

Room Number: *7D114*

*JAV*

Description	Serial Number	Reason for Disposal	Total
Lang Network Book		} out of date	1
Lit Book			1
Sunday Cards			1 PK
Coach Books			2
ABS workbooks			5
ABS Textbooks			3

Reason: *DM out of date*

Pick-up Location: \_\_\_\_\_

Principal's/Supervisor's Signature *Lenny M...* Date *6/17/24*

Assistant Superintendent Signature \_\_\_\_\_ Date \_\_\_\_\_

Office Use:

Date Declared \_\_\_\_\_

Date of Disposal \_\_\_\_\_

Picked Up By \_\_\_\_\_

Disposal Method \_\_\_\_\_

Saucon Valley School District  
Office of the Assistant Superintendent

TO: David Bonenberger, Business Manager

FROM: Jaime Vlasaty, Assistant to the Superintendent

RE: Surplus / Obsolete Materials

SCHOOL: SVMMS

Room Number: D112

*gmv*

Copyright Date	Publisher	Title/Series	Total
		Frog Dissection Frogs	8 buckets (200 frogs)
		Worm Dissection Worms	2 containers (100 worms)
70		Small Dissection Tray, Mats, Lids (New)	
		Old Dissection Trays + Mats	30
		Dissection tool Kits	40

Reason: No longer in curriculum

Pick-up Location: D112

Principal's/Supervisor's Signature *Alvin Mikulson* Date 11/16/24

Assistant Superintendent Signature \_\_\_\_\_ Date \_\_\_\_\_

Office Use:

Date Declared \_\_\_\_\_

Date of Disposal \_\_\_\_\_

Picked Up By \_\_\_\_\_

Disposal Method \_\_\_\_\_

Saucon Valley School District  
Office of the Superintendent

TO: David Bonenberger, Business Manager

FROM: Jaime L. Vlasaty, Superintendent

RE: Surplus / Obsolete Materials

SCHOOL: SVES

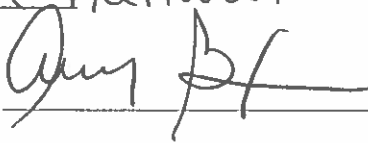
Room Number: A215



Description	Serial Number	Reason for Disposal	Total
Student book A		receiving new	9
Student book B		materials	22
workbook B		↓	14

Reason: Obsolete

Pick-up Location: 2nd grade hallway

Principal's/Supervisor's Signature  Date 6/7/24

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

Office Use:

Date Declared \_\_\_\_\_

Date of Disposal \_\_\_\_\_

Picked Up By \_\_\_\_\_

Disposal Method \_\_\_\_\_

## Finance Committee Summary – June 19, 2024

The Finance Committee of the Saucon Valley School Board met on June 19, 2024, at 5:00 p.m. in the district Office Audion.

The following items were on the Finance Committee agenda:

- Discussion & Action: 2024-2025 Budget

The Finance Committee recommended sending the following item to the Board for approval:

- 2024-2025 Budget – 2.375 increase and \$809,836.00 coming from Fund Balance

**SAUCON VALLEY SCHOOL DISTRICT**  
**2024-2025 Homestead and Farmstead Exclusion Resolution**

**RESOLVED**, by the Board of School Directors of the Saucon Valley School District, that homestead and farmstead exclusion real estate tax assessment reductions are authorized for the school year beginning July 1, 2024, under the provisions of the Homestead Property Exclusion Program Act (part of Act 50 of 1998) and the Taxpayer Relief Act (Act 1 of 2006), as follows:

**1. Aggregate Amount Available for Homestead and Farmstead Real Estate Tax Reduction:**

The following amounts are available for homestead and farmstead real estate tax reduction for the school year beginning July 1, 2024:

- a. Gambling Tax Funds - The Pennsylvania Department of Education (PDE) has notified the School District that PDE will pay to the School District during the school year pursuant to Act 1, 53 P.S. § 6926.505(b), as a property tax reduction allocation funded by gambling tax funds, the amount of \$1,381,076.74.
- b. Philadelphia Tax Credit Reimbursement Funds - PDE has notified the School District that PDE will pay to the School District during the school year pursuant to Act 1, 53 P.S. § 6926.324(3), as reimbursement for Philadelphia tax credits claimed against the School District earned income tax by School District resident taxpayers, the amount of \$25,388.74.
- c. Gambling Tax Funds and Philadelphia Tax Credit Reimbursement Funds from 2023-2024 that weren't distributed and that are available for utilization \$11,012.25.
- d. Aggregate Amount Available - Adding these amounts, the aggregate amount available during the school year for real estate tax reduction is \$1,417,477.73.

**2. Homestead/Farmstead Numbers:**

Pursuant to Act 50, 54 Pa. C.S. § 8584(i), and Act 1, 53 P.S. § 6926.341 (g)(3), the County has provided the School District with a certified report listing approved homesteads and approved farmsteads as follows:

- a. Homestead Property Number - The number of approved homesteads within the School District is 4,579.
- b. Farmstead Property Number - The number of approved farmsteads within the School District is 20.
- c. Homestead/Farmstead Combined Number - Adding these numbers, the aggregate number of approved homesteads and approved farmsteads is 4,599.

**3. Real Estate Tax Reduction Calculation:**

The school board has decided that the homestead exclusion amount and the farmstead exclusion amount shall be equal. Dividing the paragraph 1(d) aggregate amount available during the school year for real estate tax reduction of \$1,417,477.73 by paragraph 2(c) aggregate number of approved homesteads and approved farmsteads of 4,599 the maximum real estate tax reduction amount applicable to each approved homestead and to each approved farmstead is \$308.43.

**4. Homestead Exclusion Calculation:**

Dividing the paragraph 3 maximum real estate tax reduction amount of \$308.43 by the School District real estate tax rate of 55.9570 mills (.0559570), the maximum real estate assessed value reduction to be reflected on tax notices as a homestead exclusion for each approved homestead is \$5,512.00, and the maximum real estate assessed value reduction to be reflected on tax notices as a farmstead exclusion for each approved farmstead is \$5,512.00.

**5. Homestead/Farmstead Exclusion Authorization – July 1 Tax Bills:**

The tax notice issued to the owner of each approved homestead within the School District shall reflect a homestead exclusion real estate assessed value reduction equal to the lesser of (a) the County-established assessed value of the homestead, or (b) paragraph 4 maximum real estate assessed value reduction of \$5,512.00. The tax notice issued to the owner of each approved farmstead within the School District shall reflect an additional farmstead exclusion real estate assessed value reduction equal to the lesser of (a) the County-established assessed value of the farmstead, or (b) paragraph 4 maximum real estate assessed value reduction of \$5,512.00. For purposes of this Resolution, “approved homestead” and “approved farmstead” shall mean homesteads and farmsteads listed in the report referred to in paragraph 2 above and received by the School District from the County Assessment Office on or before May 1 pursuant to Act 1, 53 P.S. § 6926.341(g)(3), based on homestead/farmstead applications filed with the County Assessment Office on or before March 1. This paragraph 5 will apply to tax notices issued based on the initial tax duplicate used in issuing initial real estate tax notices for the school year, which will be issued August 1, and will not apply to interim real estate tax bills.

SAUCON VALLEY SCHOOL DISTRICT  
NORTHAMPTON COUNTY, PENNSYLVANIA

RESOLUTION OF THE BOARD OF SCHOOL DIRECTORS

A RESOLUTION providing property tax rebates for each calendar year to certain senior citizens, widows, widowers, and disabled persons with fixed and limited incomes; establishing uniform standards and qualifications for eligibility to receive a rebate; and providing penalties for fraudulent claims.

WHEREAS, the Board of School Directors of the Saucon Valley School District recognizes the severe economic plight of certain senior citizens, widows, widowers, and disabled persons with fixed and limited incomes who are faced with rising living costs and constantly increasing tax and inflation cost burdens which threaten their homesteads and self-sufficiency; and

WHEREAS, the Board of Directors considers, and has considered, it to be a matter of sound public policy to make special provisions for property tax rebates during the 2024-2025 year for the school taxes paid for the 2023-2024 school tax year to that class of senior citizens, widows, widowers, and disabled persons who are real property taxpayers and who are without adequate means of support to enable them to remain in peaceable possession of their homes and relieving their economic burden.

NOW, THEREFORE, the Board of School Directors of the Saucon Valley School District of Northampton County, Pennsylvania, hereby adopts the following Resolution, to be known as the "Senior Citizens Property Tax Rebate Resolution of 2024" to incorporate herein all subsequent amendments, and to conform to current Commonwealth legislation.

## Section 1 Definitions

The following words and phrases, when used in this Resolution shall have the meanings ascribed to them in this Section, except where the context clearly indicates or requires a different meaning.

1.1 "Income" means all income from whatever source derived, including but not limited to salaries, wages, bonuses, commissions, income from self-employment, alimony, support money, cash public assistance and relief, the gross amount of any pensions or annuities including fifty percent of Railroad Retirement benefits, fifty percent of all benefits received under the Federal Social Security Act (except Medicaid benefits), all benefits received under State Unemployment Insurance Laws and veterans' disability payments, all interest received from the Federal or any State government or any instrumentality or political subdivision thereof, realized capital gains, rentals, worker's compensation, and the gross amount of loss of time insurance benefits, life insurance benefits, and proceeds (except the first Five Thousand (\$5000.00) Dollars of the total of death benefit payments), and gifts of cash or property (other than transfers by gift between members of a household) in excess of a total value of Three Hundred (\$300.00) Dollars, "Income" shall not include surplus food or other relief of any kind supplied by a governmental agency, any property tax or rent rebate, any inflation dividend, the value of property received by inheritance or the amount of any damages received, whether by civil suit or settlement agreement, on account of personal injuries or sickness.

1.2 "Household income" for the calendar year means all income received by the claimant and all household members while residing in the homestead during the

calendar year during which real property taxes are levied or imposed by the Saucon Valley School District and for which calendar year a rebate is claimed.

1.3 “Homestead” means a dwelling and so much of the land surrounding it as is reasonably necessary for use of the dwelling as a home, owned and occupied by a claimant. A “homestead” shall also include premises occupied by reason or ownership in a cooperative housing corporation, mobile homes which are assessed as realty for local property tax purposes, and the land if owned by the claimant, upon which the mobile home is situated, and other similar living accommodations, as well as a part of a multi-dwelling or multi-purpose building and part of the land upon which it is built. It shall also include premises occupied by reason of the claimant’s ownership of a dwelling located on land owned by a nonprofit incorporated association, of which the claimant is a member if the claimant is required to pay a pro-rata share of the property taxes levied against the association’s land. It shall also include premises occupied by a claimant if he or she is required by law to pay a property tax by reason of his or her ownership in the dwelling, the land, or both. An owner includes a person in possession under a contract of sale, deed of trust, life estate, joint tenancy, or tenancy in common or by reason of descent and distribution.

1.4 “Real Property Taxes” means all taxes on a homestead (exclusive of municipal assessments, delinquent charges, and interest) levied or imposed by the Saucon Valley School District and due and payable during a calendar year.

1.5 “Claimant means a person who files a claim for a property tax rebate and (a) was sixty-five (65) years of age or over, or whose spouse (if a member of the household) was sixty-five (65) years of age or over, during a calendar year in which real property taxes were levied, due and payable: (b) was a widow or widower and was fifty

(50) years of age or over during a calendar year or part thereof in which real property taxes were levied, due and payable, or (c) was a permanently disabled person eighteen (18) years of age or over during a calendar year or part thereof in which real property taxes were levied, due and payable. For the purposes of this Resolution, the term “widow” or “widower” shall mean the surviving wife or surviving husband, as the case may be, of a deceased individual who has not remarried, and the term “permanently disabled person” shall mean a person who is unable to engage in any substantial gainful activity by reason of any medically determinable physical or mental impairment which can be expected to continue indefinitely.

Section 2  
Property Tax Rebate

2.1 Any claim for a property tax rebate for real property taxes paid to the Saucon Valley School District shall for any calendar year be limited to the excess of real property taxes paid to the District over the real property tax rebate available by reason of the payment of such school taxes under the Senior Citizens Rebate and Assistance Act of the Commonwealth of Pennsylvania. Rent or inflation rebates shall not be considered by the District. The amount of such claim under this Resolution for the 2023 calendar year shall be determined in accordance with the following schedule unless otherwise adjusted by the Board of School Directors:

<b>TOTAL INCOME</b> From <u>Line 12</u> of your claim form			Your maximum rebate is
0	to	\$8,000	\$650
\$8,001	to	\$15,000	\$500
\$15,001	to	\$18,000	\$300
\$18,001	to	\$35,000	\$250

2.2 The maximum amount of rebate payable to any claimant under this Resolution shall not exceed Six Hundred Fifty (\$650) Dollars per calendar year. The school district will not issue a rebate that when added to the State Rebate would exceed the total amount of the school district property tax paid.

2.3 Constant ownership must be for the full period of time covered by the tax for which the rebate is being sought.

### Section 3

#### Filing of Claim

3.1 A claim for property tax rebate shall be filed with the Business Administrator of the Saucon Valley School District between July 1, 2024 and April 30, 2025 for the 2023-2024 school district property taxes levied. Only one (1) claimant from a homestead each year shall be entitled to a property tax rebate. If two (2) or more persons are able to meet the qualifications for a claimant, they may determine who the claimant shall be. If they are unable to agree, each claimant shall receive one-half ( $\frac{1}{2}$ ) of the rebate.

### Section 4

#### Proof of Claim

4.1 Each claim shall include the District's completed rebate Form TRCF-1000, a signed copy of the PA-1000 for 2023, a copy of the PA rebate check received or a copy of the bank statement showing a direct deposit, and a copy of the receipted school tax bill for 2023-2024. It shall not be necessary that such taxes were paid by the claimant himself/herself; provided that the taxes must have been paid no later than the date of filing the claim for rebate.

### Section 5

#### Incorrect Claim

5.1 Whenever the Business Administrator of the Saucon Valley School District finds the claim to have been incorrectly determined, he/she shall re-determine the correct amount of the claim and notify the claimant of the reason for the redetermination and the amount of the corrected claim.

## Section 6

### Claim Forms

6.1 Claims shall be filed only on forms prepared and provided by the Saucon Valley School District.

## Section 7

### Fraudulent Claim: Conveyance to Obtain Benefits

7.1 In any case in which a claim is excessive and was filed with fraudulent intent, the claim shall be disallowed in full and a penalty of twenty-five (25%) percent of the amount claimed shall be imposed. The penalty and the amount of the disallowed claim, if the claim had been paid, shall bear interest at the rate of one-half (1/2) of one (1%) percent per month from the date of the claim until repaid. The claimant and any person who assisted in the preparation or filing of a fraudulent claim shall be guilty of a misdemeanor, and, upon conviction thereof, shall be sentenced to pay a fine not exceeding One Thousand (\$1,000.00) Dollars, or undergo imprisonment not exceeding one (1) year, or both.

7.2 A claim shall be disallowed if the claimant received title to the homestead primarily for the purpose of receiving a property tax rebate.

Section 8  
Petition for Redetermination

8.1 Any claimant whose claim for a property tax rebate is denied, corrected, or otherwise adversely affected by the Business Administrator of the Saucon Valley School District may file with the Board of School Directors a petition for redetermination within ninety (90) days after the date of mailing of written notice by the Business Administrator of such action. Such petition shall set forth the grounds upon which the claimant alleges that such action of the Business Administrator is erroneous or unlawful, in whole or in part, and shall be accompanied by an affidavit or affirmation that the facts contained therein are true and correct. The Board of School Directors, by designated committee, shall hold such hearings as may be necessary for the purpose of redetermination, and each claimant who has duly filed such petition for redetermination shall be notified by the Board of School Directors of the time when, and the place where, such hearing in his or her case will be held.

Section 9

Severability

9.1 The provisions of this Resolution are severable; if any word, phrase, clause, sentence, section, or provision of this Resolution is for any reason held to be unconstitutional or illegal, or invalid, the decision of any Court shall not affect or impair any of the remaining provisions of this Resolution. It is hereby declared to be the intent of the Board of School Directors of the Saucon Valley School District that this Resolution would have been adopted had such unconstitutional or illegal or invalid word, phrase, clause, sentence, section, or provision thereof not been included herein.

Service Company	Contract/ Cost Received	23-24	24-25	\$ Increase/ Decrease	% Increase/ Decrease	Item	Budget Code
BJ Terroni	X	\$5,225.00	\$5,225.00	\$0.00	0.00%	HS Hot Water Boiler PM	2690-430
Chrin Disposal	X	\$56,400.00	\$59,520.00	\$3,120.00	5.53%	Trash and Recycling	2690-411
Burkholders HVAC	X	\$14,000.00	\$15,300.00	\$1,300.00	9.29%	HVAC Rooftop Condenser PM	2690-430
Cintas	X	\$16,453.52	\$18,392.50	\$1,938.98	11.78%	Fire Alarm Inspections	2690-430
Degler Whiting	X	\$3,798.00	\$3,798.00	\$0.00	0.00%	Bleacher PM	2690-430
Dude Solutions	X	\$4,000.00	\$4,244.00	\$244.00	6.10%	Software for Workorders	2690-650
Ehrlich	X	\$6,000.00	\$6,730.44	\$730.44	12.17%	Pest Management	2690-430
Emergency Systems	X	\$1,800.00	\$2,605.94	\$805.94	44.77%	Emergency Generator PM	2690-430
ET&T	X	\$6,481.17	\$6,913.36	\$432.19	6.67%	Software for New Phone System	2690-430
Hydra	X	\$1,000.00	\$1,100.00	\$100.00	10.00%	Septic Cleanout	2690-430
Integritech	X	\$4,800.00	\$5,750.00	\$950.00	19.79%	Boiler Room Chemical Treatment	2690-430
Johnson Control	X	\$51,805.00	\$54,395.00	\$2,590.00	5.00%	Johnson Control System PM	2690-430
Keystone	X	\$4,191.00	\$5,398.58	\$1,207.58	28.81%	Monitoring Service of District Intrusion Detection and Access Control Systems	2690-430
Kiriposki Inc	X	\$4,000.00	\$7,800.00	\$3,800.00	95.00%	Portable Toilets	2690-442
Mountain Environmental	X	\$5,160.00	\$5,490.00	\$330.00	6.40%	Asbestos Inspections and SDS Organizing	2690-430
Otis Elevator	X	\$10,270.00	\$11,091.60	\$821.60	8.00%	Elevator Inspections and PM	2690-430
ProAC Corp	X	\$4,447.00	\$5,938.00	\$1,491.00	33.53%	Coollig Tower PM	2690-430
ProShred	X	\$2,500.00	\$1,000.00	-\$1,500.00	-60.00%	Document Shredding	2690-430
Safety-Kleen	X	\$2,200.00	\$2,100.00	-\$100.00	-4.55%	Oil Disposal	2790-430
Spangler Boyer	X	\$2,700.00	\$2,700.00	\$0.00	0.00%	HS PoolPak HV PM	2690-414
STEM Landscaping	X	\$50,000.00	\$55,000.00	\$5,000.00	10.00%	Lawn Cutting and Bed Maintenance	2690-414
Tomlinson Bomberger	e	\$40,000.00	\$60,000.00	\$20,000.00	50.00%	Field and Ground Pesticide/Herbicide	2690-430
Trane	X	\$3,900.00	\$0.00	-\$3,900.00	-100.00%	Trane Chiller PM	2690-430
Tristate	X	\$10,200.00	\$10,200.00	\$0.00	0.00%	HS HVAC PM Daikin System	2690-430
TuWay Radio	e	\$3,840.00	\$15,978.00	\$12,138.00	316.09%	License for Hand Held Radio <b>(PAID)</b>	2690-530
Tyler Technologies	X	\$6,706.00	\$6,706.00	\$0.00	0.00%	Transportation Software	2790-650
<b>Total</b>		<b>\$321,876.69</b>	<b>\$373,376.42</b>	<b>\$51,499.73</b>	<b>16.00%</b>		



**April 19, 2024**

**Billed to:**

Trebron Security, LLC  
 P.O. Box 68  
 Strasburg, PA 17579  
 Attn: Phil Santoro: 610-401-8841  
[psantoro@trebron.com](mailto:psantoro@trebron.com)

Saucon Valley School District  
 2097 Polk Valley Rd.  
 Hellertown, PA 18055  
 Attn: Michael Hanssen  
[michael.hanssen@svpanthers.org](mailto:michael.hanssen@svpanthers.org)

Quote Number	Quote Valid Until	Payment Terms
04192024-PS	5-15-2024	Special Trebron Payment Plan / Net 30

**Option 1 - Securly Renewal – 3 Years**

Qty	Description	Term (Months)	Unit Price (\$USD)	Total Price (\$USD)
2,000	Securly Filter Premium	36	\$15.92	\$31,840.00
1,290	Securly Pass Core	36	\$9.03	\$11,648.70
Total (Excluding tax as applicable):				\$43,488.70

**Special Trebron Payment Plan**

- Payment 1 Due March 31, 2024 \$14,496.23
- Payment 2 Due March 31, 2025 \$14,496.23
- Payment 3 Due March 31, 2026 \$14,496.24

**Option 2 - Lightspeed Filter + Securly Renewal of Pass– 3 Years**

Qty	Description	Term (Months)	Unit Price (\$USD)	Total Price (\$USD)
1,970	Lightspeed Filter	36	\$15.00	\$29,550.00
1,290	Securly Pass Core	36	\$9.03	\$11,648.70
Total (Excluding tax as applicable):				\$41,198.70

**Special Trebron Payment Plan**

- Payment 1 Due May 31, 2024 \$13,732.90
- Payment 2 Due May 31, 2025 \$13,732.90
- Payment 3 Due May 31, 2026 \$13,732.90

**Standard NIST Risk Assessment - Check box to add**

Qty	Included Components	Total Price (\$USD)
1	Standard NIST Risk Assessment	\$ 0.00

**Advanced NIST Risk Assessment - Check box to add (will be invoiced separately)**

Qty	Included Components	Total Price (\$USD)
1	Advanced NIST Risk Assessment	\$1,500.00

**Notes:**

- Subscription Start and End Dates: 8/1/2024 – 7/31/2027
- Licenses - granted pursuant to the terms of the Sophos End User License Agreement (EULA)

**Order Confirmation: Please sign and email to your Trebron Account Executive.**

I understand that by signing this Purchase Order/Quote confirmation I agree to the following:

- I am authorized by the "billed to" party to purchase the item listed above.
- All information is accurate with regard to price, description, quantity and billing address.
- The "billed to" party agrees to pay the invoice in accordance with terms of Net 30.
- Late Charges will be billed after 30 days at 18% rate of interest including, but not limited to legal fees to collect.
- Product licenses provide rights to utilize the aforementioned software to a maximum of the quoted quantity.
- This quote shall in no way be construed as creating an obligation on the part of Sophos, but rather indicates a right and intent to enter into an agreement with the "billed to" party described above.
- **To take advantage of the Trebron Payment Plan a "Trebron Purchase Agreement" will also need to be signed.**

**Tax Exempt?  Yes  No**

(if yes, please supply tax exempt number or documentation showing tax exempt status)

Authorized Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

Billing Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

Billing Email: \_\_\_\_\_



Date: May 10, 2024

Buyer: Saucon Valley School District

Trebron Account Executive: Phil Santoro  
Trebron Security, LLC P.O. Box 68  
Strasburg, PA 17579  
610-401-8841 Direct  
[psantoro@trebron.com](mailto:psantoro@trebron.com)

Mailing 2097 Polk Valley Rd.  
Address: Hellertown, PA 18055

### Purchase Agreement

The Parties hereto, "Buyer," Saucon Valley School District and "Seller," Trebron Security, LLC hereby agree as follows:

- 1. **Description:** Buyer agrees to purchase from Seller, "Product" as listed in the table below for \$41,198.70 (Forty-One Thousand One Hundred Ninety-Eight United States Dollars and 70/100), plus applicable shipping costs and sales tax, unless Buyer is exempt from the payment of such tax and provides Seller with evidence of such exemption.

Qty	Description	Term (Months)
1,970	Lightspeed Filter	36
1,290	Securly Pass Core	36

- 2. **Payment:** To be made to Seller in three annual installments. The first payment is in the amount of \$13,732.90 and is due on or before July 1, 2024. The second payment is in the amount of \$13,732.90 and is due on or before July 1, 2025. The third and final payment is in the amount of \$13,732.90 and is due on or before July 1, 2026. Payment Terms are net thirty (30) days from date of invoice. All payments shall be by check made payable to Trebron Security, LLC at the address listed above.
- 3. **Term:** Buyer's license for the product expires approximately July 31, 2027 (3 years).
- 4. **Representations:** Buyer understands that Seller is a reseller of hardware and software products. Buyer acknowledges that it has not relied on any representations by Seller and has independently investigated the products and determined the suitability of the products for Buyer's intended purposes.
- 5. **Warranty:** Seller shall pass through to Buyer any original manufacturers' warranties for Product acquired by Seller for Buyer, including Licensor's warranties for Product. Except for the foregoing, Seller shall deliver the Product "as is" and Seller makes no other warranty, express or implied, including any warranty of merchantability or fitness for a particular purpose.
- 6. **Limitation of Liability:** Under no circumstances will Seller be liable for any incidental, indirect, special or consequential damages from Buyer or any third party, including damages for lost revenue, profits, data or use, even if Seller has been advised of the possibility of such damages. In no event shall Seller's entire liability under this agreement exceed the price of the products under this Agreement.
- 7. **Indemnification:** Buyer shall defend, indemnify and hold harmless Seller, its owner, its employees and its agents from and against all damages, claims and liabilities of every nature whatsoever, including but not limited to reasonable legal expenses, arising in connection with or out of the improper or unauthorized operation, use, or repair of the products furnished to Buyer.
- 8. **Late Fees:** Late payments shall accrue interest beginning from the payment due date at a rate of eighteen percent (18%) per annum or the maximum allowable legal rate whichever is lower. In the event that any payment or amount owed is more than ninety (90) days past due, Seller may declare the entire amount due and owing in addition to accrued fees and costs. Buyer's failure to pay under this agreement may result in termination of Buyer's software license.
- 9. **Cancellation:** Once Seller has accepted Buyer's order, Buyer cannot cancel the agreement, in whole or in part, without Seller's express written consent. Such cancellation is conditioned upon Buyer's reimbursement to Seller for all costs incurred by Seller in connection with the order up to the time of cancellation—including, but not limited to Seller's cost for cancellation.
- 10. **Attorney's Fees:** In the event any cost or expense, including reasonable attorney's fees ("Costs") are incurred in the enforcement of this Agreement, the prevailing party shall be entitled to reimbursement for all such Costs in addition to damages.

11. **Governing Law:** This Agreement shall be construed and interpreted in accordance with the laws of the Commonwealth of Pennsylvania. Venue for any and all actions shall be in the state or federal courts of Lancaster County, Pennsylvania.
12. **Software:** Buyer will negotiate all software license provisions of Product directly with the Licensor.
13. **Miscellaneous:** This Agreement must be executed on or before March 12, 2024 or it becomes void.
14. **Waiver:** The waiver of any breach of any provision of this Agreement shall not operate or be construed as a waiver of any subsequent breach and shall be effective only if presented in writing.
15. **Severability:** If any provision of this Agreement is deemed invalid or unenforceable, all other provisions of this Agreement shall remain in full force and effect.
16. **Entire Agreement/Execution in Counterparts:** This Agreement constitutes the entire Agreement of the parties and may not be amended or superseded except in writing with execution by both parties. This Agreement may be executed in multiple counterparts, any of which need not contain the signatures of more than one party, but all such counterparts taken together shall constitute one and the same agreement. Facsimile or otherwise electronically submitted signatures (including email) shall be deemed to have the full force and effect of original ink signatures and shall be equally binding as though delivered directly by hand from one party to another.

## Saucon Valley School District

\_\_\_\_\_  
IT Director Signature

\_\_\_\_\_  
Business Office Signature **(required – must be signed by an authorized representative of Buyer)**

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

\_\_\_\_\_  
Accounts Payable Contact

\_\_\_\_\_  
Accounts Payable Phone

\_\_\_\_\_  
Accounts Payable Email

**Tax Exempt?**  Yes  No

(If yes, please supply tax exempt number or documentation showing tax exempt status)

## Trebron Security, LLC

X

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

**Dave Peck, President**

\_\_\_\_\_  
Printed Name / Title

## **LETTER OF AGREEMENT**

### **Student Assistance Program Liaison Services**

For the upcoming school year (2024-2025), the *Center for Humanistic Change* (CHC) shall provide Liaison services to support the Student Assistance Program (SAP) for *Saucon Valley School District*. The roles for SAP services are as follows:

#### **Center for Humanistic Change, Inc.**

**The services that the CHC SAP Liaisons will provide include a combination of the following during the 2024-2025 academic year:**

- Attend a minimum of two core team meetings per month for secondary schools.
- Attend a minimum of one core team meeting per month for elementary schools.
- Provide ongoing consultation between site visits as necessary.
- Act in accordance with State and Federal Confidentiality Laws.
- Provide student screenings as needed and assist students and parents in the referral to and access of appropriate services.
- When applicable plan and facilitate educational SAP Groups.
- Be familiar with and maintain a working library of school policies (e.g. ATOD, Bullying, Crisis, Suicide Awareness and Prevention) that affect SAP.
- Attend orientation, open house, and other pertinent school events to educate the school, parent and general community about SAP.
- Provide relevant training to students, parents, faculty and staff, including educating about SAP and SAP services.
- Educate and guide teams with student/parental strategies/interventions and identification of available treatment and other resources.
- Participate in parent/teacher meetings.
- Document program related activities and collect data as required by Lehigh/Northampton County.
- Facilitate or participate in core team maintenance.
- Provide each SAP team with a self-evaluation tool. The Liaisons will distribute, collect, analyze, and provide the team with recommendations based on the results.
- Assist the school with stakeholder in-service (i.e., school board, parents, school staff, community members etc.).
- When applicable, facilitate and support the school-based aftercare plan for students who are returning to school from treatment.
- Collaborate with other agencies through networking with Drug and Alcohol, Mental Health and other systems as needed in order to link schools with available community resources.
- A PA Approved SAP Training Provider (PASTP) will provide technical training as needed.
- Maintain a file of background checks and clearances for all personnel assigned to the school district by CHC for the Student Assistance Program Liaison Services. Provide copies of clearances as requested.

#### **The School District will:**

- Provide teams a common meeting time, a locked cabinet, ongoing training, and regular team maintenance in accordance with 22 PA code Chapter 12 and BEC 24 P.S. 15-1547 and 13-132.
- Provide SAP Coordinator/Case Manager with pertinent information regarding the student and the reason for the referral.
- Obtain written permission from the parent for SAP services.
- Maintain records generated by the SAP team in accordance with the policies of the district and applicable Federal Laws.

- Provide the SAP Liaison with a copy of the school district alcohol, tobacco and other drug policies, crisis related policies, bullying policy, student handbook, suicide awareness and prevention policy and any other policies, which may affect the Student Assistance Program.
- Maintain case files, which include data that the Liaison is, required to submit to Lehigh/Northampton County.
- Promote and support the SAP Liaison as a working member of the team.
- Appoint a school site staff who will be responsible for facilitating the ZOOM connection with the CHC SAP Liaison if virtual SAP meetings are needed.
- Appoint a school site staff who will be responsible for providing parent phone and email contact information to CHC for remote programming if needed.
- Provide CHC PAYS data on years completed and CHC will not share data without written and explicit permission.
- Provide Wi-Fi access when Liaison is completing a screening with a student (as they are online only).
- Provide a private and confidential space for Liaison and student when completing a health screening.

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**School Superintendent or Deputy  
(Designated Contact)**

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**Title**

---

**Date**

---

*Wendy Texter*  
**Wendy Texter**  
**SAP Manager**  
**Center for Humanistic Change, Inc.**  
**(Designated Contact)**

5/24/2024  
**Date**

---

*Kristen A Hettrick*  
**Kristen Hettrick**  
**Executive Director**  
**Center for Humanistic Change, Inc.**

5/24/2024  
**Date**

## **CONFIDENTIALITY INFORMATION**

### **Student Assistance Program**

Center for Humanistic Change, Inc. (CHC) is required to adhere to the following confidentiality provisions, as outlined by the CHC Contract of Service with Northampton County. As per these requirements, CHC has included the following information as an informational addendum to the letter of agreement.

#### **Confidentiality Provisions:**

CHC agrees that all information acquired through their employment will be kept confidential. CHC agrees that all persons currently or formerly screened, assessed, diagnosed, counseled, treated and rehabilitated for drug and alcohol abuse and dependence, shall be protected from disclosure of their names, identities, patient records and the information contained therein except as disclosure is permitted by state and federal statute and regulation. To assure confidentiality of client information, CHC shall make adequate provision for system security and protection of individual privacy.

CHC shall store counseling and testing records in locked cabinets. Coded names, number sequences, and other Department-approved methods that assure confidentiality shall be permitted. CHC is required to keep all client counseling and testing information and AIDS patients' identities, records, and information in such records confidential. CHC shall not release HIV information from these records without the specified prior written and informed consent of the client in accordance with the confidentiality requirements contained in Act No. 1990-148, 35 P.S. Section 7601 et seq.

CHC and others subject to the confidentiality requirements of the Pennsylvania Drug and Alcohol Abuse Control Act (71 P.S. Section 1690.108), the Public Health Service Act (42 U.S.C. Section 290dd-2), Federal Confidentiality Regulations (42 C.F.R. Part 2), and State Confidentiality Regulations (4 Pa. Code Section 255.5(b) and 257.4), the Confidentiality of HIV-Related Information Act 1990-148, the Healthcare Facility Act (35 P.S. Section 7601 et seq.) and the Health Insurance Portability and Accountability Act (HIPAA and HITECH), and any other appropriate confidentiality law, shall comply with such requirements, as applicable.

Additionally, all CHC employees are required to sign the following **confidentiality statement**:

In the normal course of employment and the fulfillment of assigned work duties and responsibilities, I understand that I may have access to or view information regarding clients and employees. With regard to all such information, I agree to observe a strict standard of confidentiality. I further agree that knowledge and information of a confidential nature, gained through employment may not be used, distributed or discussed outside of my immediate work responsibilities.

I understand and agree that breach of such confidentiality shall subject me to progressive disciplinary action, up to and including discharge. Further, it is understood that in accordance with Federal Law, any substantiated breach of client confidentiality is also punishable by a \$500.00 fine for the first violation and up to \$5,000.00 for any subsequent violations.

I hereby attest that I have read and understood this Confidentiality Statement and agree that my continued employment is contingent upon strict adherence to same. I understand, and agree, that I will be disciplined, and possibly discharged, should I violate this standard of strict confidentiality.



## Service Agreement 2024-2025

May 3, 2024

Jaime Vlasaty, Superintendent  
Saucon Valley School District  
2097 Polk Valley Rd.  
Hellertown, PA 18055

Dear Mrs. Vlasaty,

The following letter outlines a proposed agreement for communication services to be provided to the Saucon Valley School District by the Donovan Group.

**1. Services:** If accepted, the Saucon Valley School District (“District”) agrees to retain the Donovan Group II LLC (“Donovan Group”), with Liam Goldrick (Partner) as the primary point of contact, to provide the following services:

- a. Communications Strategy and Support: The Donovan Group will support the strategic communication efforts of the District and serve as a resource to district administrators, school administrators, certificated staff, and school board members. The Donovan Group partner will meet with the district superintendent regularly to plan projects, offer guidance, and discuss strategy.
- b. Content Creation: The Donovan Group’s writers will create unlimited articles, news releases, and letters, along with other written content. The firm will also draft, proof, and edit parent messages, newsletter articles, and other content.
- c. Graphic Design: The Donovan Group’s graphic and digital designers will create one-pagers, fact sheets, brochures, logos, mailers, display boards, and other marketing collateral for the District.
- d. Social Media Content: The Donovan Group will develop social media content and graphics to help the district communicate about a variety of issues and highlight the accomplishments and successes for its schools, students, and staff. This will include the provision of a weekly social media planner.
- e. Communication Audit: The Donovan Group, upon request, will conduct a communication audit for the District. This work may include some or all of the following: a community and staff survey, design of a postcard mailer, completion of a communications inventory, a website audit, focus groups, and an audit report.
- f. Communication Planning: The Donovan Group, upon request, will work with the district to create and implement a communications plan. This work will involve content creation, graphic design, video production, and other deliverables as outlined in the plan.

- g. Video Production: The Donovan Group can assist with the creation of up to two professionally produced videos each month. District staff will be responsible for filming, while the Donovan Group will edit and produce each video.
- h. Website Content Updates: The Donovan Group will assist with making content updates to the District's website.
- i. Crisis Communication: The Donovan Group will assist the District with urgent or crisis situations as they arise. The firm's team is available 24/7/365 to help the district manage communications around these situations.
- j. Translation: All the content the Donovan Group produces can be translated into various languages. Up to 5,000 words of translated content per month is included with the services provided.

Subject to the following conditions, the Donovan Group agrees to fulfill all its obligations to the satisfaction of the District.

**2. Equipment:** The Donovan Group will provide its own equipment for the performance of the agreed-upon services.

**3. Term:** This contract shall commence on July 1, 2024 and conclude on June 30, 2025.

The District may terminate this agreement for its convenience upon 30 days written notice to the Donovan Group and upon payment of the Donovan Group's final invoice for services rendered prior to the date of termination.

**4. Compensation:** The Donovan Group agrees to fulfill all of its obligations under the direction of the District superintendent and District staff, including communication-related tasks and projects as assigned.

The cost of this service will be \$3,925 per month for the duration of this agreement.

**5. Independent Contractor Status:** It is understood that the Donovan Group is an independent contractor and is not an employee, agent, partner, or representative of the District. The Donovan Group and its agents will not represent themselves as employees, agents, partners, or representatives of the District. The Donovan Group shall be solely responsible for all necessary payroll deductions for its agents and employees, including, but not limited to, federal, state, and local income taxes, social security taxes, unemployment compensation taxes, and workers' compensation coverage.

**6. Proof of Insurance:** As an independent contractor, the Donovan Group will secure, at its own cost, all necessary insurance.

Thank you for the opportunity to work with the Saucon Valley School District. Please email this signed agreement to me at [liam.goldrick@donovan-group.com](mailto:liam.goldrick@donovan-group.com) and retain a copy for your records.

Sincerely,

*Liam Goldrick*

Liam S. Goldrick, M.P.P.  
Partner  
Donovan Group

Accepted and agreed upon:

---

Jaime Vlasaty  
Superintendent  
Saucon Valley School District

Date



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## **SERVICE AGREEMENT**

This PROTECTION SERVICE AGREEMENT (the “Agreement”) is entered into this \_\_\_\_ day of \_\_\_\_\_ 2024, by and between the Saucon Valley School District (“Client”) and Cardinal Point Homeland Security Group (“CPSG”).

### **BACKGROUND**

CPSG is engaged in the business of providing protective services (the “Services”). The client desires to retain CPSG to provide Services to Client.

NOW, THEREFORE, in consideration of the mutual promises and conditions set forth herein, for other good and valuable consideration the receipt and sufficiency of which are hereby acknowledged, and intending to be legally bound hereby, Client and CPSG hereby agree as follows:

1. **SERVICES:** CPSG shall provide Services to Client as set forth in Exhibit “A” attached hereto. Client shall pay for such Services in accordance with the terms and conditions as set forth in Exhibit “A” attached hereto. CPSG’s candidate possesses any and all necessary certifications and clearances to act as a school police officer for Client and will cooperate as may be necessary with any and all applications and approvals the Client may be required to obtain to allow CPSG’s candidate to act as a School Police Officer.

A. CLIENT will not solicit directly or indirectly any CPSG employee for employment, contractor, partner, or officer while this contract is in effect or for a period of two years after its termination. A CPSG employee or contractor may not be hired in any capacity unless this section is waived by the Chief Executive Officer of CPSG. The client will pay a fee of \$15,000 dollars per employee they wish to hire directly with CPSG permission. The CLIENT agrees that and acknowledges that its non-solicitation obligations hereunder are essential to the protection of CPSG’S business.

B. CPSG makes no representation, warranty, or guarantee that services to be furnished at a location constitute complete security at a location. CPSG agrees to provide the specific services as described in Addendum “A”, in a professional manner in accordance with established KPIs.

C. CPSG shall supply appropriate, agreed-upon company attire/uniforms for all security personnel. Any change or modification to the uniform specs after the contract execution may result in a price increase that the CLIENT will be responsible for.

2. **TERM:** The term of this Agreement shall begin on the date hereof and shall terminate

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**T R U S T E D   P E O P L E ,   P R O C E S S ,   P R O T E C T I O N**

upon the completion of the Services (See Exhibit “A”). The contract is valid until June 30, 2025. This agreement may be terminated early by either party with 60 days written notice to cancel services. CPSG will provide the Client with 60 written notice to terminate except in the instance the CLIENT is over 45 days late with a payment to CPSG. In that instance, CPSG can cancel the contract immediately upon written notice to the CLIENT.

3. **DISCLAIMER OF WARRANTY:** CPSG provides security service and personnel according to specifications determined by the Client. Accordingly, CPSG does not make and hereby does disclaim all warranties, express and implied, including, without limitation, the merchantability or fitness for a particular purpose of any work performed hereunder.

A. It is further understood that CPSG is being engaged to use professional and trained efforts in providing security services as outlined in Exhibit “A”. CPSG is not an insurer and the rates being paid are for security services only and not designed to diminish certain risks of loss that are not related in any way to the value of the personnel or real property being protected. amounts billed by CPSG, are insufficient to guarantee, implied or otherwise, that no loss or damage will occur due to criminal acts, including theft, sabotage, vandalism, workplace violence, or fire.

B. CPSG will not be responsible for or pay for losses, damage to, or theft of CLIENT property unless the damage or loss is due to negligence or misconduct of CPSG employees. CPSG total liability under this agreement will be limited to amounts of insurance coverage as set forth in the Certificate of Liability Insurance. CPSG shall not be held liable for any third-party acts.

4. **INDEMNIFICATION:** Each party shall be responsible for any and all liabilities attributable to its own negligent acts, failures to act or breaches of this Agreement to the extent of its proportionate share of any liabilities resulting therefrom. Each party (an “Indemnifying Party”) shall protect, indemnify, defend, and hold the other party and the other party’s principals, officers, members, shareholders, employees, agents, successors and assigns (“Indemnified Parties”) harmless from and against any and all suits, demands, costs, claims, damages, losses, and liabilities, including the Indemnified Party’s reasonable attorneys’ fees and costs of litigation, arising from or in any way related to the Indemnifying Party’s negligent acts, failures to act or contractual breaches in the performance of this Service Agreement. Client shall indemnify and hold CPHSG harmless from any claims arising from Client’s use, occupation or maintenance of Client’s Property unless due solely to CPHSG’s negligence or willful misconduct. Nothing about the indemnification provisions herein shall limit the Clients rights and defenses under the Political Subdivision Tort Claims Act.

5. **SURVIVAL OF TERMINATION:** All provisions of this Agreement regarding disclaimer of liability and warranty, indemnification, or payment for Services shall survive any termination of this Agreement.

6. **CONFIDENTIALITY:** At all times after the date hereof, neither party shall, except with the express prior written consent of the other party, directly or indirectly, communicate, disclose, divulge or use for its own benefit or the benefit of any other person or entity, any confidential or proprietary knowledge or information of or about this Agreement or of or about the other party acquired prior to or during the term of this Agreement. For this purpose, confidential and/or proprietary

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TRUSTED PEOPLE, PROCESS, PROTECTION

information refers to any information that is not readily available to the public.

7. **ASSIGNMENT:** Neither party shall assign its rights or obligations hereunder without the prior written consent of the other party, which shall not be unreasonably withheld.

8. **LAW GOVERNING AGREEMENT:** This Agreement shall be governed by the laws of the Commonwealth of Pennsylvania, and all disputes requiring adjudication shall be adjudicated by the Northampton County Court of Common Pleas, located in Easton, Pennsylvania.

9. **NO THIRD-PARTY BENEFICIARIES:** This Agreement is entered into exclusively by and for the benefit of Client and CPSG, and does not create any rights for the benefit of third parties.

10. **ENTIRE AGREEMENT:** This Agreement constitutes the entire Agreement between Client and CPSG with respect to the subject matter hereof and shall not be amended or modified except in writing duly executed by both parties.

11. **SEVERABILITY:** If any provision of this Agreement is determined at law to be unenforceable for any reason, such provision shall be reformed only to the minimum extent required to allow it to be so enforceable, and such provision shall not affect the enforceability of the remaining provisions hereunder.

12. **CLIENT REPRESENTATION:** On behalf of Client, the undersigned represents and warrants that he or she is duly authorized to execute this Agreement, understands and acknowledges that the terms and conditions including the disclaimers of liability and warranty, indemnification, and limitations on use of information provided hereunder constitute a material part of this Agreement in consideration for which services hereunder are rendered by CPSG, and that CPSG may rely upon all of the terms and conditions in entering this Agreement.

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

**CARDINAL POINT HOMELAND SECURITY GROUP:**

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

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

**SAUCON VALLEY SCHOOL DISTRICT:**

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

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

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TRUSTED PEOPLE, PROCESS, PROTECTION

# “Exhibit A” Scope of Work



## General Information

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**1. CONTACT:**

David J Bonenberger, PCSBA  
Director of Fiscal and Operations Management  
Saucon Valley School District  
2097 Polk Road  
Hellertown, PA 18055  
Office 610-838-7001  
[david.bonenberger@svpanthers.org](mailto:david.bonenberger@svpanthers.org)

**2. SERVICE** - CPSG will conduct the following security operations at the Saucon Valley School District.

Armed School Security Officers shall be provided according to the below weekly schedule.

**3. CONTRACT LENGTH** - The service shall take place beginning on July 1, 2024 and continue until June 30, 2025 according to the weekly billable schedule reflected below;

Days of Week	Times	Number of Officers	Type
Monday to Friday	7:00 AM to 3:00 PM	1	SPO
Monday to Friday	2:00 PM to 10:00 PM	1	SPO

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#### 4. GENERAL RESPONSIBILITIES

Post Orders: TBD in collaboration with client.

5. **ATTIRE** – Officer(s) will wear Cardinal Point polo shirt, khaki pants. Officers will be equipped with exterior body armor.

6. **REQUIRED CLEARANCES** – Prior to the officer's start date, CPSG will provide the district with proof of compliance for the following clearances:

- Pennsylvania Child Abuse History Certification.
- Pennsylvania Criminal History Background Check.
- Federal Bureau of Investigation (FBI) Criminal Background Check OR FBI Disclosure Statement/Affirmation.

#### Deliverable(s)

---

CPSG will provide the above security services. Client will be informed in writing in the event of an incident that involves the police, fire or EMS.

#### Performance Period

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All work is to begin on the date specified by the Client. Security operations are to be performed within the abovementioned time period unless extended at the Client's request.

#### Billable Rates and Payment Terms

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1. **Rates:**
  - a. **School Police Officer: \$50 per hour**
  - b. **Armed School Security Officer: 43.00 per hour**
2. **Short Notice Rate:** \$65 for SPO, \$55 per hour for Armed Security Officer. (Requests for additional staff with less than 48 hours notice)
  1. **Holiday Rate:** (7) nationally recognized holidays - Time and One half will be billed to any officer working on the following holidays:  
New Year's Day, Memorial Day, Independence Day (4th of July),  
Labor Day, Thanksgiving Day, The Day After Thanksgiving, and Christmas Day.
3. **Payments for service are due 45 days after invoicing.**
4. **4-hour minimum:** Client agrees that all shifts will be staffed for a minimum of four hours.
5. **Overtime:** When school officers work in excess of forty hours in a given week, client will be charged at a rate of time and one half of the regular bill rate.
6. **Inclement Weather Days:** In recognition of the challenges posed by inclement weather and the need for high-quality officers, CPSG Officers will receive up to five (5) paid snow/inclement weather days per school year. These days shall be used in cases of snow or severe weather conditions whereby a contracted school assignment or activity has been canceled by the school.

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TRUSTED PEOPLE, PROCESS, PROTECTION

district. Unused snow/inclement weather days in any given calendar year shall not be carried over to the next year nor shall they be subject to compensation for unused days.

**7. Officer Reporting System:** \$50 per month.

**PRICING –**

There will be a “pass-through” charge to the client for any change in federal, state, or local ordinance that effectively increases the hourly pay rate of an employee or mandates additional benefits to be given to employees working in that jurisdiction.

**CPI ADJUSTMENT**

At the expiration of the initial period thereafter ending June 30, 2025 and each one-year period during the Term, the Base Rate shall be subject to CPI adjustment as follows: At the expiration of the initial period ending June 30, 2025, and each one-year period thereafter, the annual rate for the succeeding one year period shall be determined by multiplying the annual Base rate in effect for the immediately preceding one year period times the "CPI Factor" (as hereinafter defined), provided, however, that the CPI Factor shall never be less than 2.0 and never more than 4.0. As used herein, the "CPI Factor" which shall be determined at the expiration of each one-year period during the Term, shall be determined as follows:

The above prices are valid for 15 days from the date of execution of this Statement of Work. CPSG reserves the right to negotiate additional fees for services rendered above and beyond those enumerated herein. All material utilized above during the performance of the services set forth herein and any travel, lodging and meals will be billed as pass through expenses.

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980 Jolly Road, Suite 110  
PO Box 3001  
Blue Bell, PA 19422  
☎ 610.397.6500 📠 610.397.0450  
WWW.FOXROTHSCHILD.COM

MARK W. FITZGERALD  
Direct No: 610.397.7981  
Email: mfitzgerald@foxrothschild.com

June 20, 2024

**VIA EMAIL**

[Jaime.Vlasaty@svpanthers.org](mailto:Jaime.Vlasaty@svpanthers.org)

Jaime Vlasaty, Superintendent  
Saucon Valley School District  
2097 Polk Valley Road  
Hellertown, PA 18055-2400

**Re: Saucon Valley School District - Retainer Agreement for Solicitor Services and Specialized Services from July 1, 2024 through June 30, 2025**

Dear Jaime:

What follows is the standard fee letter of Fox Rothschild LLP in conjunction with Solicitor Services for the 2024-2025 school year. In the event the board approves of our reappointment, this letter will confirm that the Saucon Valley School District (the “Client”) has retained Fox Rothschild LLP (the “Firm”) to represent Client in connection with the matter described below. The Engagement Letter (the “Letter”), along with the attached Standard Terms of Engagement (the “Standard Terms”), comprise the Engagement Agreement (the “Agreement”) between Client and the Firm and explain the terms under which the Firm will provide legal services to Client in this matter. In the event of a discrepancy between the Standard Terms and the Letter, the provisions set forth in the Letter will prevail.

As the Administration is undoubtedly aware, Fox Rothschild LLP prides itself both on the quality of legal services and the level of responsiveness we provide. Please be assured that the continuity of the level of services that you have come to expect will not change; however, we are requesting a minimal increase in the rates for the 2024-2025 school year. There will be no change to items covered under the School retainer of \$21,000.00 per year.

**Scope of Work.** Client has engaged the Firm to provide the following services described in detail below (“Engagement”). Client has not engaged the Firm, nor has the Firm agreed, to represent Client regarding any other matter. If Client requires the Firm’s services in connection with any other matter, please let me know.

A Pennsylvania Limited Liability Partnership

California Nevada Colorado New Jersey Delaware New York District of Columbia North Carolina Florida Oklahoma Georgia Pennsylvania Illinois South Carolina Massachusetts Texas Minnesota Washington Missouri

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Jaime Vlasaty, Superintendent

June 20, 2024

Page 2

**Identity of Client.** The Firm's only client in the Engagement is the individual identified as Client in the first paragraph of this Letter.

**Term of Engagement.** July 1, 2024 through June 30, 2025. Client will be billed monthly on a fee arrangement based upon the appropriate designation of a matter as being either "retainer," "non-retainer," or "specially negotiated rates" as described below.

**ITEMS COVERED UNDER THE SCHOOL  
RETAINER OF \$21,000.00 PER YEAR (no change)**

1. Attendance at two (2) regularly scheduled public meetings per month.
2. Routine matters involving the representation of the Client that are not addressed in the sections involving NON-RETAINER: Items Not Covered Under the School Retainer (including but not limited to litigation matters).
3. Regular opinions (not involving tax advice, advice covered by Circular 230 of the Internal Revenue Service, or non-routine areas of advice addressed in NON-RETAINER: Items Not Covered Under the School Retainer) requested by either the Administration or the Board.
4. General personnel issues, except as described in NON-RETAINER: Items Not Covered Under the School Retainer.
5. Non-adverse matters not described in the in Items Not Covered Under the School Retainer.
6. Client memoranda, updates, and newsletters.
7. Preparation of routine agreements (except collective bargaining, computer, benefits, or other agreements described in NON-RETAINER: Items Not Covered Under the School Retainer). Notwithstanding the foregoing, if counsel is involved in reviewing or preparing an agreement with an adverse party, the matter will be an Item Not Covered Under the School Retainer.
8. Review and/or revisions to routine policies of the Board or proposed administrative regulations of the Board. This would not include, however, specialized policies, such as sexual harassment, Family and Medical Leave Act, HIPAA, Internet, acceptable use policies, data destruction policies, and any procedures and/or implementation related to the same.
9. Preparation of routine resolutions or wording of resolutions.



Jaime Vlasaty, Superintendent

June 20, 2024

Page 3

10. New board member training session and training manual in municipal election years (which does apply to this year).

**NON-RETAINER: ITEMS NOT COVERED UNDER THE SCHOOL RETAINER  
SUBJECT TO A BLENDED HOURLY RATE OF \$205.00 PER HOUR  
(Change from prior year.)**

1. Land development issues relating to building projects.
2. Personnel items involving demotions, terminations, HIPAA-related claims or requirements, seniority calculations, transfer of entities, investigations regarding violations of school policies, any investigations regarding management level, employees as directed by the District, or other similar personnel actions.
3. Appointments and/or contracts relating to administrators.
4. Responses to grievances pursuant to a collective bargaining agreement and handling of arbitrations pursuant to a collective bargaining agreement.
5. Attendance at committee meetings or special meetings of the Board not covered under the proposed retainer.
6. Student discipline issues, special education hearings, advice relating to special education matters when the student is represented by an advocate or an attorney, or subsequent litigation (subject to insurance carrier requirements).
7. Student and/or employee subpoenas and/or requests for production of documents.
8. Responses to Right to Know requests pursuant to Pennsylvania law.
9. Seeking exceptions or court petitions relating to any referendum requirements.
10. Non-routine situations that would involve matters in which a case or controversy has arisen or may arise by virtue of threatened litigation or litigation that is imminent or likely, circumstances in which the Client is contacted by an attorney representing a specific client, actual litigation, hearing requests, citizen complaints, OCR investigations, defense of complaints filed in court or before agencies, hearings before the School Board itself, or other items contemplated in SPECIALLY NEGOTIATED RATES, Paragraph 5.
11. Negotiation with vendors or other parties concerning non-routine contracts.



Jaime Vlasaty, Superintendent

June 20, 2024

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12. Student residency disputes.
13. Employee discipline matters.
14. Establishing or terminating special entities, such as authorities, vocational-technical schools, foundations, joint school or departments, consortia, charter schools, or other similarly formed related entities.
15. Court proceedings for the sale of real estate.
16. Special court actions required pursuant to the School Code or other law.
17. Responding to Auditor General investigations or District Attorney investigations.
18. Non-routine policies.
19. Acceptable use policies and standard software licensing agreements that are not addressed in Miscellaneous Matters and Rates.
20. Specialized Act 1 of 2006 advice.
21. Specialized advice regarding Act 32 of 2008 (tax collection advice).

#### **SPECIALLY NEGOTIATED RATES**

1. School financing, including but not limited to bond issues, collateral exchanges, tax revenue anticipation notes, swap agreements, and loans. These matters will usually be handled on a fixed fee basis, to be determined by the Firm and Client, based upon the size and complexity of the issue (no change).
2. Matters relating to tax increment financing work, which will be billed at the rate of \$245.00 per hour, unless such rates are subject to reimbursement of a non-insured third party (i.e., developer), when the rates will be based upon the customary hourly rates charged by Fox Rothschild LLP to non-retainer, non-school clients (no change).
3. Collective bargaining where we represent the Client as its negotiator for contracts that expire after the 2024-2025 fiscal year will be billed at a rate of \$250.00 per hour (no change).
4. Title IX investigations where there is an identified complainant and respondent will be billed at \$225.00 per hour (no change).



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5. Specialized contracts calling for a tax opinion from Fox Rothschild LLP (i.e., financing and copier leases), guaranteed energy savings contracts, preparation of specialized agreements or plans, such as Section 125 plans, Section 457 plans, Section 401(a) plans, Section 403(b) plans, Health Reimbursement Accounts, benefits-related agreements, COBRA, HIPAA, and PSERS' advice, condemnation and construction litigation, transactional aspects of major building construction projects, including but not limited to alterations of school buildings involving projects instituted on or after the date of this Retainer Agreement, tax opinions required pursuant to IRS Circular 230, intellectual property advice or agreements, immigration advice or proceedings, or any advice or proceedings relating to the formation or dissolution of foundations formed pursuant to Section 501(c)(3) of the Internal Revenue Code, matters involving the sale or purchase of school property and matters involving the transactional aspects of major building construction projects, which would include but not be limited to the alterations or renovations of school building projects, specification review, architectural contracts, or engineering projects for projects instituted on or after the date of this Retainer Agreement will be handled at a blended rate of \$245.00 per hour (no change).

6. Audit inquiry responses: A flat fee of \$500.00 for the original audit inquiry request and \$300.00 per update will be charged (no change).

7. Litigation instituted on or after the date of this Retainer Agreement that will be unique or non-customary litigation on the part of the Client. An example of this exception will include complex securities litigation, bankruptcy litigation, litigation involving investment of bond or other investment proceeds of the Client, any complex litigation not described in Items Not Covered Under the School Retainer. Such litigation will be charged based upon the customary hourly rates charged by Fox Rothschild LLP to non-retainer, non-school clients, less 20% (no change).

6. Matters covered by insurance. Notwithstanding the rates set forth in this Retainer Agreement, Fox Rothschild LLP's handling of insurance matters will be subject to the insurance company representation guidelines and rates. Where an insurance company is involved, we may ask that you pay our monthly bills and then we will submit claims for reimbursement on your behalf to the insurance company. In all cases in which insurance coverage may be available, the ultimate responsibility for payment of our charges will remain with the Client (no change).

The hourly rates specified in the Letter shall prevail over the range of fees in the Standard Terms as specifically set forth in the Letter.

The costs for which you will be charged include filing fees; telephone, telecopy, word processing, overnight mail, messenger and other communication costs; staff overtime when appropriate; computer research; court reporters, photographers and other professional fees; travel and meal



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June 20, 2024

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expenses; and other miscellaneous costs. Where possible, we will have vendors bill you directly for such costs or we will send you the bill and request that you pay the vendor directly. Certain costs, such as telephone charges, are sometimes not available until subsequent months, in which case a supplemental bill will be rendered, or an estimated amount will be included in the initial bill and an adjustment made when the actual charges are known.

All bills are payable upon presentation and are considered delinquent if not paid within thirty days of issuance. If a bill is not timely paid, we may cease to render further services or, in the case of a litigation matter, we may petition the court to withdraw as counsel. A service charge will be added to the unpaid amount of any delinquent bill.

It is the policy of this law firm that no individual except Edward Gillespie (Chief Accounting Officer) shall have the authority to vary, alter, modify or contradict the enclosed billing arrangement or any subsequent bills that may result there from.

Suggested Motion for Board Action. Based upon this letter, we are suggesting that the following motion appear on your May or June agenda:

“Motion to appoint Fox Rothschild LLP as Solicitor for the Saucon Valley School District for the time period of July 1, 2024 through June 30, 2025.”

**Future Representation.** If Client asks the Firm to take on an additional assignment in the future, the terms in the Agreement will cover such later assignment(s), unless Client and the Firm reach a separate understanding, which understanding will be reflected in a separate writing, which may include e-mails.

**Conclusion.** If Client has any questions about the Agreement, please contact me as soon as possible. Client may consult with separate counsel regarding this Agreement.

Please acknowledge your acceptance to the terms in the Agreement and your receipt of the Standard Terms by signing one copy of the Letter and returning the signed copy to me at your earliest convenience. This Agreement will take effect on the date of Client's signature or when the Firm first performs legal services for Client, whichever is earlier.



Jaime Vlasaty, Superintendent

June 20, 2024

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We appreciate the opportunity and privilege to represent Client in the Engagement.

Very truly yours,

A handwritten signature in black ink, appearing to read "Mark W. Fitzgerald".

Mark W. Fitzgerald

MWF/ssd

cc: David Bonenberger

ACCEPTED AND AGREED

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

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

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



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## Standard Terms of Engagement for Legal Services

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### Overview

Any defined term in the Engagement Letter ("Letter") shall have the same definition in the Standard Terms of Engagement ("Standard Terms"). In the event of a conflict between the provisions in the Standard Terms and the Letter, the provisions in the Letter shall control.

### Communications

Client agrees to be candid and cooperative with the Firm and to provide the Firm with full, complete, and truthful information. Client will communicate with the Firm before communicating with any parties, witnesses, or their counsel, or with any experts or consultants, about the Engagement.

Client agrees to inform the Firm, in writing, of any changes in Client's name, address, telephone number, contact person, or email address. The Firm will endeavor to keep Client informed of the status of the Engagement to the extent necessary to enable Client to make informed decisions.

Client acknowledges that any opinion or belief that the Firm expresses from time to time about the Engagement, including various courses of action and the results that might be anticipated, is intended merely to be an expression of opinion based upon information available to the Firm at the time and not a promise or guarantee.

In order to increase the Firm's efficiency and responsiveness, the Firm will use state of the art communication devices (i.e., email, document transfer by computer, wireless telephones, facsimile transfer and other devices which may be developed in the future). The use of such devices may place Client's confidences and privileges at risk. However, the Firm believes that the efficiencies involved in the use of these devices outweigh the risk of accidental disclosure. Client authorizes the Firm to use these electronic communication devices.

### Affiliations by Client

Client agrees and acknowledges that, unless specifically stated otherwise in the Letter, the Engagement is not an agreement by the Firm to represent any of Client's affiliates, subsidiaries, constituents, parents or related individuals, officers, directors, partners, members, shareholders, employees, independent contractors or agents (collectively, "Affiliates"). Client agrees that the Firm's representation of Client in the Engagement does not give rise to an attorney-client relationship between the Firm and any of Client's Affiliates. Further, the Firm's representation of Client in the Engagement will not give rise to any conflict of interest in the event other clients of the Firm are adverse to any of Client's Affiliates.

### Estimates

The fees and costs relating to the Engagement are not predictable. Accordingly, the Firm has made no commitment to Client concerning the maximum amount of fees and costs that will be necessary to complete the Engagement. Any estimate of fees and costs that the Firm and Client may have discussed orally or in writing represents only an estimate of such fees and costs. Client also understands that payment of the Firm's fees and costs is not contingent on the ultimate outcome of the Engagement.

### Fees and Billing

The Firm reserves the right to revise the staffing of the Engagement as

it deems efficient. The Firm's billing rates are adjusted from time to time to reflect then current levels of legal experiences, changes in overhead costs, market conditions or other appropriate considerations.

The Firm typically incurs costs in connection with the Engagement. Client agrees to reimburse the Firm for any costs and expenses incurred in the course of the Engagement.

The Firm will issue regular Invoices that detail the fees and costs incurred in the Engagement. Payment is due within thirty (30) days from the date of Invoices. Unpaid Invoices will accrue interest at the maximum rate permitted by applicable laws. If an Invoice is not timely paid, the Firm may withdraw from the Engagement. If necessary, the Firm shall file a motion with the court to withdraw as counsel in the Engagement and Client shall not oppose said motion.

### Third-Party Payor

Unless agreed to in writing between Client and the Firm, even though a third party ("Third Party Payor") may have agreed to pay the Invoices incurred in the Engagement, Client agrees to be ultimately responsible for payment of all Invoices incurred in the Engagement. If Client has advised the Firm that a Third Party Payor will be paying some or all of the Invoices, Client acknowledges that, should Client instruct the Firm to share confidential information with that Third Party Payor, including Invoices, Client may lose any privileges or protections that may apply to that information.

### Conflicts of Interest

In the Firm's representation of Client in the Engagement, it may be necessary for the Firm lawyers to analyze or address their professional duties or responsibilities or those of the Firm, and to consult with the Firm's General Counsel, or other lawyers, in doing so. To the extent the Firm is addressing its duties, obligations or responsibilities to Client in those consultations, it is possible that a conflict of interest might be deemed to exist as between Client and the Firm. As a condition of the Engagement, Client waives any conflict of interest that might be deemed to arise out of any such consultations. Client further agrees that these consultations are protected from disclosure by the Firm's attorney-client privilege.

### Patent and Intellectual Property Matters

If the Engagement concerns patent prosecution, Client agrees and acknowledges that the Firm will not be responsible for the payment of maintenance fees and/or patent annuities (collectively, "Patent Annuities"). Client further agrees that Client will handle the payment of Patent Annuities either directly or through firms that specialize solely in the payment of annuities for patent portfolios around the world. If Client needs assistance in identifying firms that provide such services, the Firm will provide Client with information upon request. To the extent that the Engagement relates to the defense of Client's intellectual property rights, Client's comprehensive general liability or other liability insurance carrier may provide some reimbursement for the Invoices.

### Protected Health Information

Federal and state laws impose duties on both clients and law firms to ensure the privacy and security of "protected health information" (PHI), which broadly includes identifiable health and personal information of

May 2024

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California Colorado Delaware District of Columbia Florida Georgia Illinois Massachusetts Minnesota Missouri  
Nevada New Jersey New York North Carolina Oklahoma Pennsylvania South Carolina Texas Washington

individuals. Client should not send or transmit to the Firm any PHI in any format, whether by hard copy, email, facsimile or other medium, unless and until: (i) Client and the Firm have a current, signed Business Associate Agreement in place; (ii) the attorney with whom Client is working at the Firm has determined that the PHI is needed in connection with the Engagement; (iii) Client has notified the attorney in advance of the transmission of the PHI; and (iv) the attorney has approved the manner by which such PHI will be received by the Firm. Client must let the Firm know if Client anticipates that the Engagement will involve PHI, so that the Firm can take the necessary steps to allow its transmission to the Firm.

### Use of Personal Information

The Firm gathers and processes personal data pursuant to all applicable law. The Firm will use personal information that we receive in connection with providing legal services to Client, marketing our services to Client, and to comply with applicable law. During and after the Engagement, the Firm may disclose personal information to parties involved in the work the Firm is performing, opposing parties, arbitration panels and courts, and any other reasonably foreseeable entity. Additionally, the Firm may use third parties, wherever located, to store and process personal data received from Client or its agents or other sources.

### California Consumer Privacy Act

The California Consumer Privacy Act of 2018 (section 1798.100 et seq., Cal. Civ. Code), as may be amended, as well as regulations that may be promulgated thereunder (collectively, "CCPA"), may apply to the Firm's representation of Client. If applicable, you agree that the Firm is acting as a service provider (as defined in the CCPA). In the course of representing Client, the Firm may process one or more consumer's personal information on Client's behalf. The Firm will not disclose, retain, sell, or use that personal information (as those terms are defined in the CCPA) for any purpose other than to perform its legal services in the Engagement or as otherwise permitted by the CCPA.

### No Tax Advice

Unless specifically stated in the Letter, or in a subsequent written communication between the Firm and Client, the Engagement will not include providing Client with legal advice pertaining to any federal, state, foreign, or local tax matter or issue, whether or not directly related to or affected by the legal matters that are part of the Engagement.

### Client's Obligation to Place Insurance Carrier on Notice

If Client has not already done so, Client should put any insurer on notice of any claims that have been or could be made in connection with the Engagement, so that the insurer cannot take the position that notice was given late or that insurer was prejudiced by delay in providing such notice.

### Conclusion of Engagement and Client Files

Unless previously terminated, the attorney-client relationship between Client and the Firm, related to the Engagement, will terminate when the Firm sends to Client the Firm's final Invoice for services rendered in the Engagement or when the Firm advises Client that it will no longer represent Client in the Engagement.

Client may terminate the Engagement at any time. The Firm may terminate the Engagement subject to applicable ethical and legal requirements. If permission for withdrawal is required by a court or arbitration panel, the Firm will promptly request such permission and Client agrees not to oppose such request. Client will remain obligated for any Invoices through the effective date of the termination.

Once Client's matter is concluded, the Firm will notify Client, offer to return any original material Client provided to the Firm, and close the matter. Client can request that the entire file be sent to Client at this

time. If Client does not request the return of the entire file, it may be sent to storage off-site, and thereafter an administrative cost may be charged to Client for retrieving it from storage. Client is responsible for complying with any records retention obligations that may be applicable to any record.

Under the Firm's Records Retention Policy, as may be modified from time-to-time, the Firm may dispose of files as early as seven (7) years after a matter is closed. The Firm will send written notice to Client at the last address in the Firm's records before disposing of any of Client's files. It is Client's responsibility to notify the Firm of any changes in Client's mailing address so that the Firm can properly notify Client. If Client's mailing address is out of date in the Firm's records at the time of the foregoing notice, Client agrees that the Firm may destroy files that Client has not previously requested be returned to Client.

The Firm and Client agree that all original Client-supplied materials and all lawyer end-product (referred to generally as "client material") are the property of the Client. Lawyer end-product includes, for example, final contracts, pleadings, and trust documents. The Firm and Client agree that lawyer work product, and copies of any electronic discovery documents or data, are the property of the Firm. Lawyer work product includes, for example, drafts, notes, internal memoranda, and electronic files, and lawyer representation and administration materials, including related lawyer-client correspondence and conflicts materials. The Firm will assume that Client has a copy of all electronic documents provided to the Firm by Client or on Client's behalf, and that Client retains in Client's records all electronic and physical materials provided to Client in the course of the Engagement. All nonpublic information that Client has supplied to the Firm and that the Firm retains will be kept confidential in accordance with applicable rules of professional responsibility.

### Future Changes in the Law

Client acknowledges that, after the Engagement has terminated, the Firm has no continuing obligation to advise Client of future legal developments, unless Client subsequently engages the Firm to do so.

### Severability in Event of Partial Invalidity

If any provision of the Agreement is held in whole or in part to be unenforceable for any reason, the remainder of that provision and of the entire Agreement will be severable and will remain in effect. If the Agreement has been provided to Client in a language other than English, the provisions contained in the English version shall control.

### Artificial Intelligence

The Firm believes that the appropriate and responsible use of artificial intelligence ("AI") technology enhances the legal services that we provide to our clients. We further believe that the use of AI technology may provide our clients with more accurate, cost-effective, and efficient legal solutions.

We may use AI technology tools provided by third parties that may be pre-trained and/or pre-trained with supplementary training by the Firm. We undertake efforts to ensure that bias that is contained in data used for supplementary training by the Firm is discovered and removed. Despite our efforts, just like information contained in academia and media sources published on the Internet, Wikipedia, and even case law, bias may remain undiscovered and affect the output from AI technology. The Firm is also acutely aware that output from AI technology is not a substitute for human judgement and legal expertise. Our attorneys will continue to provide legal advice and make final decisions on matters based on their experience, knowledge, and legal analysis, all as required pursuant to applicable ethical obligations. Although we may use AI technology to assist us in our work, it will not replace the professional judgment of our attorneys.

If you would like to discuss, encourage, limit, or prohibit the use of AI technology tools in matters for which the Firm provides you assistance, please let the Firm attorney handling the matters know.

May 2024

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California Nevada Colorado New Jersey Delaware New York District of Columbia North Carolina Florida Oklahoma Georgia Pennsylvania Illinois South Carolina Massachusetts Texas Minnesota Washington



# COLONIAL

## Intermediate Unit 20

Dedicated to your children and the people who serve them

### BALLOT

#### ELECTION TO MEMBERSHIP CIU20 BOARD OF SCHOOL DIRECTORS

**INSTRUCTIONS:** Ballot for the election of Colonial Intermediate Unit 20 Board of Directors. Voter must verify: (a) name of his/her school district; (b) the Intermediate Unit number of which his/her district is a part; and (c) the proportionate vote. Voter shall indicate his/her vote by placing an (X) in the box in front of the name of persons for whom he/she is voting and then sign the ballot.

**TO BE VALID, A BALLOT MUST BE SIGNED BY THE VOTER.**

**(VOTERS ARE ENCOURAGED TO VOTE FOR THE ONE (1) NOMINEE, UNLESS YOU FEEL THERE IS A REASON NOT TO.)**

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<u>School District</u>	<u>I.U. Number</u>	<u>Proportionate Vote</u>
Saucon Valley	20	2

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**TO BE ELECTED TO A NEW THREE-YEAR TERM – JULY 1, 2024 THROUGH JUNE 30, 2027:**

Mr. Robert Rutt Pen Argyl Area School District

Signature \_\_\_\_\_

\* The annual election of Colonial Intermediate Unit 20 Board members is conducted in accordance with the Public School Code of 1949, Sec. 910-A [24 PS 9-960(b)] – “Except for the initial election, directors shall be elected annually between February 1 and June 30 by convention or by mail ballot of the school directors of the school districts comprising an Intermediate Unit.”