

# AGENDA

## REGULAR SCHOOL BOARD MEETING

GADSDEN COUNTY SCHOOL BOARD  
MAX D. WALKER ADMINISTRATION BUILDING  
35 MARTIN LUTHER KING, JR. BLVD.  
QUINCY, FLORIDA

March 24, 2020

6:00 P.M.

### THIS MEETING IS OPEN TO THE PUBLIC

1. CALL TO ORDER
2. OPENING PRAYER
3. PLEDGE OF ALLEGIANCE
4. RECOGNITIONS

### ITEMS FOR CONSENT

#### 5. REVIEW OF MINUTES – **SEE ATTACHMENTS**

- a. February 25, 2020, 3:00 p.m. – School Board Workshop
- b. February 25, 2020, 4:30 p.m. – School Board Workshop
- c. February 25, 2020, 6:00 p.m. – Regular School Board Meeting

ACTION REQUESTED: The Superintendent recommends approval.

#### 6. PERSONNEL MATTERS (resignations, retirements, recommendations, leaves of absence, terminations of services, volunteers, and job descriptions) – **SEE PAGE #5**

- a. Personnel 2019 – 2020

ACTION REQUESTED: The Superintendent recommends approval.

- b. 2020-2021 Calendars – **SEE PAGE #7**

ACTION REQUESTED: The Superintendent recommends approval.

7. BUDGET AND FINANCIAL TRANSACTIONS

- a. Financial and Federal Single Audit for Fiscal Year Ended June 30, 2019  
**SEE PAGE #11**

Fund Source: All Funds  
Amount: See Report #2020-138

ACTION REQUESTED: The Superintendent recommends approval.

8. AGREEMENT/CONTRACT/PROJECT APPLICATIONS

- a. Membership in P.O.W.E.R Buying Group for fiscal year 2020 – 2021  
**SEE PAGE #84**

Fund Source: 4100 School Food Service  
Amount: Approximately \$2,500,000.00

ACTION REQUESTED: The Superintendent recommends approval.

- b. Membership in BuyBoard Purchasing Cooperative - **SEE PAGE #90**

Fund Source: All funds can benefit  
Amount: -0-

ACTION REQUESTED: The Superintendent recommends approval.

- c. Annual Membership in the Florida School Boards Association for 2020 – 2021  
Fiscal Year - **SEE PAGE #95**

Fund Source: 1100 General Fund  
Amount: \$10,455.00

ACTION REQUESTED: The Superintendent recommends approval.

- d. Approval of a Contract with PAEC to facilitate the Board Approved U. S. Department of Education (USDE) Grant Award for Elevate Florida (ERF) a.k.a. School Climate Transformation Grant – **SEE PAGE #98**

Fund Source: Federal  
Amount: \$739,286.00 year 1  
\$725,631.00 year 2  
\$703,631.00 year 3  
\$692,631.00 year 4  
\$681,443.00 year 5  
Total: \$3,542,602.00

ACTION REQUESTED: The Superintendent recommends approval.

- e. Approval of the 2019 – 2023 GESPA Contract – **SEE PAGE #110**

Fund Source: N/A  
Amount: N/A

ACTION REQUESTED: The Superintendent recommends approval.

- f. Education Partnership Agreement: Panhandle Area Educational Professional Development Center and The Gadsden County School Board – **SEE PAGE #157**

Fund Source: N/A  
Amount: N/A

ACTION REQUESTED: The Superintendent recommends approval.

- g. Scott v. Gadsden County School Board – **SEE PAGE #239**

Fund Source: General  
Amount: \$90,000.00

ACTION REQUESTED: The Superintendent recommends approval.

9. **STUDENT MATTERS – SEE ATTACHMENT**

- a. Student Expulsion – See back-up material

Case #56-1920-0231

ACTION REQUESTED: The Superintendent recommends approval.

- b. Student Expulsion – See back-up material

Case #63-1920-0051

ACTION REQUESTED: The Superintendent recommends approval.

- c. Student Expulsion – See back-up material

Case #64-1920-0051

ACTION REQUESTED: The Superintendent recommends approval.

- d. Student Expulsion – See back-up material

Case #71-1920-0051

ACTION REQUESTED: The Superintendent recommends approval.

- e. Student Expulsion – See back-up material

Case #73-1920-0231

ACTION REQUESTED: The Superintendent recommends approval.

- f. Student Expulsion – See back-up material

Case #74-1920-0231

ACTION REQUESTED: The Superintendent recommends approval.

- g. Student Expulsion – See back-up material

Case #75-1920 – 0231

ACTION REQUESTED: The Superintendent recommends approval.

10. EDUCATIONAL ISSUES

- a. School Field Trip Request (Out-of-State) Stewart Street Elementary School  
**SEE PAGE #240**

Fund Source: N/A

Amount: N/A

ACTION REQUESTED: The Superintendent recommends approval.

11. FACILITIES UPDATE

12. EDUCATIONAL ITEMS BY THE SUPERINTENDENT

13. SCHOOL BOARD REQUESTS AND CONCERNS

14. ADJOURNMENT

# THE SCHOOL BOARD OF GADSDEN COUNTY

35 Martin Luther King, Jr. Blvd  
 Quincy, Florida 32351  
 Main: (850) 627-9651 or Fax: (850) 627-2760  
 www.gcps.k12.fl.us

**Roger P. Milton**  
*Superintendent*  
 miltonr@gcpsmail.com



*"Putting Children First"*

March 24, 2020

The School Board of  
 Gadsden County, Florida  
 Quincy, Florida 32351

Dear School Board Members:

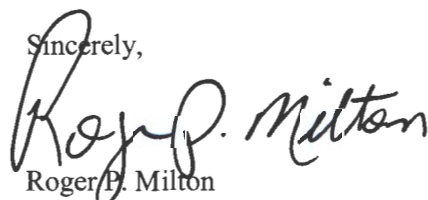
**I am recommending that the attached list of personnel actions be approved, as indicated. I further recommend that all appointments to grant positions be contingent upon funding.**

## Item 6A Instructional and Non-Instructional Personnel 2019-2020

The following reflects the total number of full-time employees in this school district for the 2019-2020 school term, as of March 24, 2019.

<u>Description Per DOE Classification</u>	<u>DOE Object#</u>	<u>#Employees March 2020</u>
Classroom Teachers and Other Certified	120 & 130	376 .00
Administrators	110	48.00
Non-Instructional	150, 160, & 170	<u>399.00</u>
		823.00

Sincerely,

  
 Roger P. Milton  
 Superintendent of Schools

Audrey Lewis  
 DISTRICT NO. 1  
 Havana, FL 32333  
 Midway, FL 32343

Steve Scott  
 DISTRICT NO. 2  
 Quincy, FL 32351  
 Havana, FL 32333

Leroy McMillan  
 DISTRICT NO. 3  
 Chattahoochee, FL 323324  
 Greensboro, FL 32330

Charlie D. Frost  
 DISTRICT NO. 4  
 Gretna, FL 32332  
 Quincy, FL 32352

Tyrone D. Smith  
 DISTRICT NO. 5  
 Quincy, FL 32351

**AGENDA ITEM 6A INSTRUCTIONAL AND NON INSTRUCTIONAL 2019/2020****INSTRUCTIONAL**

<u>Name</u>	<u>Location</u>	<u>Position</u>	<u>Effective Date</u>
Brat, Kayln	GCHS	Teacher	03/02/2020
Cato, Quintealia	GCHS	Teacher	03/03/2020
Gray, Gerald	HMS	Teacher	03/02/2020
Long, Azure	JASMS	Teacher	02/18/2020
Manning, Regina	HMS	Teacher	02/24/2020
Sully, Michael	HMS	Teacher	02/13/2020
Thomas, Shirleen	GEMS	Guidance Counselor	03/10/2020
Washington, Charita	JASMS	Teacher	03/09/2020

**NON-INSTRUCTIONAL**

<u>Name</u>	<u>Location</u>	<u>Position</u>	<u>Effective Date</u>
Carter, Dominica	SSES	Education Paraprofessional	02/24/2020
Dennis, Wytonia	Finance	Chief Account Clerk	03/23/2020
Reed, Javarrious	Maintenance	Groundskeeper	03/10/2020

**REQUESTS FOR LEAVE, RESIGNATION, TRANSFERS, RETIREMENTS, TERMINATIONS OF EMPLOYMENT:****LEAVE**

<u>Name</u>	<u>Location/Position</u>	<u>Beginning Date</u>	<u>Ending Date</u>
Davis, Sharon	GBES/Education Paraprofessional	02/25/2020	04/29/2020
Moultrie, Kimberly	GWM/Teacher	01/13/2020	02/24/2020
Perkins, Judith	Transportation/Bus Driver	11/15/2019	01/07/2020

**RESIGNATION**

<u>Name</u>	<u>Location</u>	<u>Position</u>	<u>Effective Date</u>
Hicks, James	Transportation	Mechanic	02/24/2020

**D.R.O.P. RETIREMENT**

<u>Name</u>	<u>Location</u>	<u>Position</u>	<u>Effective Date</u>
Bradwell-Conyers, Maggie	WGMS	Secretary	03/31/2020

**OUT OF FIELD**

<u>Name</u>	<u>Location</u>	<u>Area Out of Field</u>	<u>Number of Periods</u>
Manning, Regina	HMS	ESE	All Periods

**SUBSTITUTES****Teacher**

President, Denesa  
Yzaguirre, Eva

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 6b

DATE OF SCHOOL BOARD MEETING: March 24, 2020

TITLE OF AGENDA ITEM: 2020-2021 Calendars

DIVISION:

       This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM:

Approval is requested for the 2020-2021 Student, Teacher and Twelve Month Employee Calendars.

FUND SOURCE: N/A

AMOUNT: N/A

PREPARED BY: Tammy McGriff Farlin 

POSITION: Area Director of Elementary Education

INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

       Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered \_\_\_\_\_

CHAIRMAN'S SIGNATURE: page(s) numbered \_\_\_\_\_

REVIEWED BY: \_\_\_\_\_

**Gadsden County School District  
2020-2021 Student Calendar  
180 days**

<b>2020</b>	
August 11	Students first day of School
September 7	Students out of school - Labor Day Holiday District-wide
October 5-9	FTE Survey Week
October 9	End of 1 <sup>st</sup> Nine Weeks
October 12	Students out of school - Teacher Planning Day
October 13	Beginning of 2 <sup>nd</sup> Nine Weeks
October 23	Students out of school - Teacher Paid Holiday
November 11	Veteran's Day Observed District-wide
November 20	Students out of school - Teacher Paid Holiday
November 23-27	Thanksgiving Holidays/Fall Break
December 18	End of 2 <sup>nd</sup> Nine Weeks
December 21-31	Students out of school for Christmas Holidays
<b>2021</b>	
January 1	Students out of school for New Year's Holiday
January 4	Students out of school - Teacher Planning Day
January 5	Students return to school
January 18	Students out of school - Martin Luther King, Jr. Day - District-wide
February 8-12	FTE Survey Week
March 12	End of 3 <sup>rd</sup> Nine Weeks
March 15-19	Students out of school - Spring Holidays - District-wide
March 22	Students out of school - Teacher Planning Day
April 2	Students out of school - Good Friday - Teacher Paid Holiday
May 28	Last day of school for students



**Gadsden County School District  
2020-2021 Teacher Calendar  
196 days**

<b>2020</b>	
August 3	Teachers report for pre-planning
September 7	Labor Day Holiday District-wide
October 5-9	FTE Survey Week
October 12	Teacher Planning Day
October 23	Teacher Paid Holiday (1)
November 11	Veteran's Day Observed District-wide
November 20	Teacher Paid Holiday (2)
November 23-25	Teacher Paid Holiday (3, 4, 5)
November 26-27	Thanksgiving Holidays/Fall Break – District-wide
December 21-31	Students out of school for Christmas Holidays
<b>2021</b>	
January 1	New Year's Holiday
January 4	Teacher Planning Day
January 18	Martin Luther King, Jr. Day – District-wide
February 8-12	FTE Survey Week
March 15-19	Spring Holidays – District-wide
March 22	Teacher Planning Day
April 2	Good Friday - Teacher Paid Holiday (6)
May 31	Memorial Day Holiday – District-wide
June 1	Post Planning

**Gadsden County School District  
2020-2021 Twelve Month Calendar  
240 Days**

<b>2020</b>	
July	
August	
September 7	Labor Day Holiday - District-wide
October	
November 11	Veteran's Day Observed - District-wide
November 25-27	Thanksgiving Holidays/Fall Break
December 23-31	Christmas Holidays
<b>2021</b>	
January 1	New Year's Holiday
January 18	Martin L. King, Jr. Day - District-wide
February	
March 15-19	Spring Break Holidays - District-wide
April 2	Good Friday
May 31	Memorial Day Holiday - District-wide
June	

**SUMMARY SHEET**

**RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA**

**AGENDA ITEM NO.** 7a

**DATE OF SCHOOL BOARD MEETING:** March 24, 2020

**TITLE OF AGENDA ITEMS:** Financial and Federal Single Audit for Fiscal Year Ended June 30, 2019

**DIVISION:** Finance Department

**PURPOSE AND SUMMARY OF ITEMS:** Board review is requested for the District's Financial and Federal Single Audit for Fiscal Year Ended June 30, 2019.

**FUND SOURCE:** All Funds

**AMOUNT:** See Report #2020-138

**PREPARED BY:** Bonnie Wood

**POSITION:** Finance Director

**STATE OF FLORIDA AUDITOR GENERAL**

**Financial and Federal Single Audit**

**GADSDEN COUNTY  
DISTRICT SCHOOL BOARD**

For the Fiscal Year Ended  
June 30, 2019



Sherrill F. Norman, CPA  
Auditor General

### Board Members and Superintendent

During the 2018-19 fiscal year, Roger P. Milton served as Superintendent of the Gadsden County Schools and the following individuals served as School Board Members:

	<u>District No.</u>
Audrey D. Lewis, Vice Chair from 11-20-18	1
Steve Scott, Chair	2
Leroy McMillan from 11-20-18	3
Isaac Simmons Jr. through 11-19-18	3
Charlie D. Frost	4
Tyron D. Smith, Vice Chair through 11-19-18	5

The Auditor General conducts audits of governmental entities to provide the Legislature, Florida's citizens, public entity management, and other stakeholders unbiased, timely, and relevant information for use in promoting government accountability and stewardship and improving government operations.

The team leader was Shirley Dong, CPA, and the audit was supervised by Edward A. Waller, CPA.

Please address inquiries regarding this report to Edward A. Waller, CPA, Audit Manager, by e-mail at [tedwaller@aud.state.fl.us](mailto:tedwaller@aud.state.fl.us) or by telephone at (850) 412-2887.

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[FLAuditor.gov](http://FLAuditor.gov)

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**State of Florida Auditor General**

**Claude Pepper Building, Suite G74 • 111 West Madison Street • Tallahassee, FL 32399-1450 • (850) 412-2722**

**GADSDEN COUNTY DISTRICT SCHOOL BOARD**

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# SUMMARY

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## SUMMARY OF REPORT ON FINANCIAL STATEMENTS

Our audit disclosed that the basic financial statements of the Gadsden County District School Board (District) were presented fairly, in all material respects, in accordance with prescribed financial reporting standards.

## SUMMARY OF REPORT ON INTERNAL CONTROL AND COMPLIANCE

We noted certain matters involving the District's internal control over financial reporting and its operation that we consider to be significant deficiencies, as summarized below. However, these significant deficiencies are not considered to be material weaknesses.

### Significant Deficiencies

**Finding No. 2019-001:** District controls over cash continue to be deficient as the December 2017 through June 2019 reconciliations for two bank accounts and the June 2018 through June 2019 reconciliations for another bank account had not been completed as of January 2020. The bank statement cash balances at June 30, 2019, for these three accounts totaled \$5.1 million.

**Finding No. 2019-002:** Four employees and three contracted consultants had full update access privileges to information technology applications or components that allowed them to perform functions incompatible or inconsistent with their assigned job responsibilities. A similar finding was noted in our report No. 2019-162.

The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards* issued by the Comptroller General of the United States.

## SUMMARY OF REPORT ON FEDERAL AWARDS

We audited the District's compliance with applicable Federal awards requirements. The Child Nutrition Cluster, Supporting Effective Instruction State Grants, and Head Start programs were audited as major Federal programs. The results of our audit indicated that the District materially complied with the requirements that could have a direct and material effect on each of its major Federal programs.

## AUDIT OBJECTIVES AND SCOPE

Our audit objectives were to determine whether the School Board and its officers with administrative and stewardship responsibilities for District operations had:

- Presented the District's basic financial statements in accordance with generally accepted accounting principles;
- Established and implemented internal control over financial reporting and compliance with requirements that could have a direct and material effect on the financial statements or on the District's major Federal programs;



- Complied with the various provisions of laws, rules, regulations, contracts, and grant agreements that are material to the financial statements, and those applicable to the District's major Federal programs; and
- Taken corrective actions for findings included in our report No. 2019-162.

The scope of this audit included an examination of the District's basic financial statements and the accompanying Schedule of Expenditures of Federal Awards, as of and for the fiscal year ended June 30, 2019. We obtained an understanding of the District's environment, including its internal control, and assessed the risk of material misstatement necessary to plan the audit of the basic financial statements and Federal awards. We also examined various transactions to determine whether they were executed, in both manner and substance, in accordance with governing provisions of laws, rules, regulations, contracts, and grant agreements.

#### AUDIT METHODOLOGY

We conducted our audit in accordance with auditing standards generally accepted in the United States of America; applicable standards contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*.



Sherrill F. Norman, CPA  
Auditor General

# AUDITOR GENERAL STATE OF FLORIDA

Claude Denson Pepper Building, Suite G74  
111 West Madison Street  
Tallahassee, Florida 32399-1450



Phone: (850) 412-2722  
Fax: (850) 488-6975

The President of the Senate, the Speaker of the  
House of Representatives, and the  
Legislative Auditing Committee

## INDEPENDENT AUDITOR'S REPORT

### Report on the Financial Statements

We have audited the accompanying financial statements of the governmental activities, the discretely presented component unit, each major fund, and the aggregate remaining fund information of the Gadsden County District School Board, as of and for the fiscal year ended June 30, 2019, and the related notes to the financial statements, which collectively comprise the District's basic financial statements as listed in the table of contents.

### *Management's Responsibility for the Financial Statements*

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

### *Auditor's Responsibility*

Our responsibility is to express opinions on these financial statements based on our audit. We did not audit the financial statement of the school internal funds, which represents 8 percent and 36 percent, respectively, of the assets and liabilities of the aggregate remaining fund information. In addition, we did not audit the financial statements of the discretely presented component unit, which represent 100 percent of the transactions and account balances of the discretely presented component unit columns. The financial statements for the school internal funds and the discretely presented component unit were audited by other auditors whose reports have been furnished to us, and our opinions, insofar as they relate to the amounts included for those financial statements, are based solely on the reports of the other auditors. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require

that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement. The financial statement of the school internal funds was not audited in accordance with *Government Auditing Standards*.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinions.

### ***Opinions***

In our opinion, based on our audit and the reports of other auditors, the financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities, the discretely presented component unit, each major fund, and the aggregate remaining fund information of the Gadsden County District School Board, as of June 30, 2019, and the respective changes in financial position thereof for the fiscal year then ended in accordance with accounting principles generally accepted in the United States of America.

### ***Other Matters***

#### ***Required Supplementary Information***

Accounting principles generally accepted in the United States of America require that **MANAGEMENT'S DISCUSSION AND ANALYSIS**, the **Budgetary Comparison Schedule – General and Major Special Revenue Funds**, **Schedule of Changes in the District's Total OPEB Liability and Related Ratios**, **Schedule of the District's Proportionate Share of the Net Pension Liability – Florida Retirement System Pension Plan**, **Schedule of District Contributions – Florida Retirement System Pension Plan**, **Schedule of the District's Proportionate Share of the Net Pension Liability – Health Insurance Subsidy Pension Plan**, **Schedule of District Contributions – Health Insurance Subsidy Pension Plan**, and **Notes to Required Supplementary Information**, as listed in the table of contents, be presented to supplement the basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements.

We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

*Supplementary Information*

Our audit was conducted for the purpose of forming opinions on the financial statements that collectively comprise the District's basic financial statements. The accompanying **SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS**, as required by Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, is presented for purposes of additional analysis and is not a required part of the basic financial statements.

The accompanying **SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS** is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the basic financial statements. Such information has been subjected to the auditing procedures applied in the audit of the basic financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the basic financial statements or to the basic financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the accompanying **SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS** is fairly stated, in all material respects, in relation to the basic financial statements as a whole.

**Other Reporting Required by Government Auditing Standards**

In accordance with *Government Auditing Standards*, we have also issued our report dated February 28, 2020, on our consideration of the District's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, rules, regulations, contracts, and grant agreements and other matters included under the heading **INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH GOVERNMENT AUDITING STANDARDS**. The purpose of that report is solely to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the District's internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the District's internal control over financial reporting and compliance.

Respectfully submitted,



Sherrill F. Norman, CPA  
Tallahassee, Florida  
February 28, 2020

## **MANAGEMENT'S DISCUSSION AND ANALYSIS**

The management of the Gadsden County District School Board has prepared the following discussion and analysis to provide an overview of the District's financial activities for the fiscal year ended June 30, 2019. The information contained in the Management's Discussion and Analysis (MD&A) is intended to highlight significant transactions, events, and conditions and should be considered in conjunction with the District's financial statements and notes to financial statements found immediately following the MD&A.

### **FINANCIAL HIGHLIGHTS**

Key financial highlights for the 2018-19 fiscal year are as follows:

- The District's total net position decreased by \$0.2 million, or 0.4 percent.
- General revenues total \$60.3 million, or 89.6 percent of all revenues in the 2018-19 fiscal year, as compared to \$52.2 million, or 87.8 percent for the 2017-18 fiscal year.
- The unassigned fund balance of the General Fund, representing the net current financial resources available for general appropriation by the Board, totals \$4.2 million at June 30, 2019, or 8.7 percent of General Fund expenditures as compared to an unassigned fund balance of \$1.4 million, or 3.1 percent of expenditures at June 30, 2018.
- During the current fiscal year, General Fund expenditures exceeded revenues by \$5.5 million. This may be compared to the 2017-18 fiscal year's result in which General Fund expenditures exceeded revenues by \$1.7 million and the 2016-17 fiscal year's results in which General Fund expenditures exceeded revenues by \$2.2 million.
- The total long-term debt decreased by \$0.4 million, primarily because of principal payments.

### **OVERVIEW OF FINANCIAL STATEMENTS**

The basic financial statements consist of three components: (1) government-wide financial statements; (2) fund financial statements; and (3) notes to financial statements. This report also includes supplementary information intended to furnish additional details to support the basic financial statements.

#### **Government-Wide Financial Statements**

The government-wide financial statements provide both short-term and long-term information about the District's overall financial condition in a manner similar to those of a private-sector business. The statements include a statement of net position and a statement of activities that are designed to provide consolidated financial information about the governmental activities of the District presented on the accrual basis of accounting. The statement of net position provides information about the District's financial position, its assets, liabilities, and deferred inflows/outflows of resources, using an economic resources measurement focus. Assets plus deferred outflows of resources, less liabilities and deferred inflows of resources, equals net position, which is a measure of the District's financial health. The statement of activities presents information about the change in the District's net position, the results of operations, during the fiscal year. An increase or decrease in net position is an indication of whether the District's financial health is improving or deteriorating.

The government-wide statements present the District's activities in the following categories:

- Governmental activities – This represents most of the District’s services, including its educational programs such as basic, vocational, adult, and exceptional education. Support functions such as transportation and administration are also included. Local property taxes and the State’s education finance program provide most of the resources that support these activities.
- Component unit – The District presents Crossroad Academy Charter School as a separate legal entity in this report. Although the school is a legally separate organization, it is considered a component unit for financial reporting purposes and is included in this report because the school meets the criteria for inclusion provided by generally accepted accounting principles. Financial information for this component unit is reported separately from the financial information presented for the primary government.

### **Fund Financial Statements**

Fund financial statements are one of the components of the basic financial statements. A fund is a grouping of related accounts that is used to maintain control over resources that have been segregated for specific activities or objectives. The District uses fund accounting to ensure and demonstrate compliance with finance-related legal requirements and prudent fiscal management. Certain funds are established by law while others are created by legal agreements, such as bond covenants. Fund financial statements provide more detailed information about the District’s financial activities, focusing on its most significant or “major” funds rather than fund types. This is in contrast to the entitywide perspective contained in the government-wide statements. All of the District’s funds may be classified within one of the broad categories discussed below.

**Governmental Funds:** Governmental funds are used to account for essentially the same functions reported as governmental activities in the government-wide financial statements. However, unlike the government-wide financial statements, governmental fund financial statements focus on near-term inflows and outflows of spendable resources, as well as on balances of spendable resources available at the end of the fiscal year. Such information may be useful in assessing a government’s near-term financing requirements.

Because the focus of governmental funds is narrower than that of the government-wide financial statements, it is useful to compare the information presented for governmental funds with similar information presented for governmental activities in the government-wide financial statements. By doing so, readers may better understand the long-term impact of the government’s near-term financing decisions. Both the governmental funds balance sheet and the governmental funds statement of revenues, expenditures, and changes in fund balances provide a reconciliation to facilitate this comparison between governmental funds and governmental activities.

The governmental funds balance sheet and statement of revenues, expenditures, and changes in fund balances provide detailed information about the District’s most significant funds. The District’s major funds are the General Fund and the Special Revenue – Other Fund. Data from the other governmental funds are combined into a single, aggregated presentation.

The District adopts an annual appropriated budget for its governmental funds. A budgetary comparison schedule has been provided for the General and major Special Revenue Funds to demonstrate compliance with the budget.

**Fiduciary Funds:** Fiduciary funds are used to report assets held in a trustee or fiduciary capacity for the benefit of external parties, such as student activity funds. Fiduciary funds are not reflected in the government-wide statements because the resources are not available to support the District's own programs. In its fiduciary capacity, the District is responsible for ensuring that the assets reported in these funds are used only for their intended purposes.

The District uses agency funds to account for resources held for student activities and groups.

**Notes to Financial Statements**

The notes provide additional information that is essential for a full understanding of the data provided in the government-wide and fund financial statements.

**Other Information**

In addition to the basic financial statements and accompanying notes, this report also presents required supplementary information concerning the District's other postemployment benefits and net pension liabilities.

**GOVERNMENT-WIDE FINANCIAL ANALYSIS**

As noted earlier, net position over time may serve as a useful indicator of a government's financial health. The following is a summary of the District's net position as of June 30, 2019, compared to net position as of June 30, 2018:

**Net Position, End of Year**

	<b>Governmental Activities</b>	
	<b>6-30-19</b>	<b>6-30-18</b>
Current and Other Assets	\$ 15,448,224	\$ 5,399,507
Capital Assets	60,850,010	62,759,067
<b>Total Assets</b>	<b>76,298,234</b>	<b>68,158,574</b>
<b>Deferred Outflows of Resources</b>	<b>12,551,981</b>	<b>13,356,880</b>
Long-Term Liabilities	36,823,659	39,310,966
Other Liabilities	7,959,373	243,318
<b>Total Liabilities</b>	<b>44,783,032</b>	<b>39,554,284</b>
<b>Deferred Inflows of Resources</b>	<b>6,337,696</b>	<b>4,079,470</b>
Net Position:		
Net Investment in Capital Assets	59,193,759	60,732,214
Restricted	2,563,767	3,076,068
Unrestricted (Deficit)	(24,028,039)	(25,926,582)
<b>Total Net Position</b>	<b>\$ 37,729,487</b>	<b>\$ 37,881,700</b>

The largest portion of the District's net position is investment in capital assets (e.g., land; buildings; furniture, fixtures, and equipment), less any related debt still outstanding. The District uses these capital assets to provide services to students; consequently, these assets are not available for future spending. Although the investment in capital assets is reported net of related debt, the resources used to repay the debt must be provided from other sources, since the capital assets cannot be used to liquidate these liabilities.

The current and other assets increased by \$10 million from the prior fiscal year primarily due to insurance loss recoveries related to damage caused by Hurricane Michael and the increase in the Title I grant revenues. The other liabilities increased by \$7.7 million primarily due to a short-term tax anticipation note and the increase in accounts payable incurred for the repairs and additional maintenance related to damage caused by Hurricane Michael.

The restricted portion of the District's net position represents resources that are subject to external restrictions on how they may be used. The deficit unrestricted net position was the result, in part, of accruing \$2.5 million in compensated absences payable, \$3.2 million in other postemployment benefit obligations, and \$29.5 million in net pension liability.

The key elements of the changes in the District's net position for the fiscal years ended June 30, 2019, and June 30, 2018, are as follows:



## Operating Results for the Fiscal Year Ended

	Governmental Activities	
	6-30-19	6-30-18
Program Revenues:		
Charges for Services	\$ 256,497	\$ 408,473
Operating Grants and Contributions	6,292,888	6,372,346
Capital Grants and Contributions	455,366	477,463
General Revenues:		
Property Taxes, Levied for Operational Purposes	7,598,090	7,459,658
Property Taxes, Levied for Capital Projects	2,292,160	2,221,459
Grants and Contributions Not Restricted to Specific Programs	44,080,268	40,279,598
Unrestricted Investment Earnings	45,846	66,738
Miscellaneous	6,316,401	2,165,116
<b>Total Revenues</b>	<b>67,337,516</b>	<b>59,450,851</b>
Functions/Program Expenses:		
Instruction	30,091,132	28,098,822
Student Support Services	2,980,205	3,195,825
Instructional Media Services	486,745	636,780
Instruction and Curriculum Development Services	2,360,748	2,156,094
Instructional Staff Training Services	1,669,741	1,199,156
Instruction-Related Technology	150,646	226,002
Board	420,712	410,098
General Administration	858,705	742,520
School Administration	3,252,449	3,441,572
Facilities Acquisition and Construction	265,755	113,067
Fiscal Services	671,397	633,912
Food Services	4,817,712	4,862,827
Central Services	386,655	437,184
Student Transportation Services	4,887,118	4,522,645
Operation of Plant	5,974,980	5,619,995
Maintenance of Plant	4,347,811	1,240,438
Administrative Technology Services	1,079,323	878,480
Community Services	-	42,987
Unallocated Interest on Long-Term Debt	76,733	91,062
Unallocated Depreciation Expense	2,711,162	2,711,163
<b>Total Functions/Program Expenses</b>	<b>67,489,729</b>	<b>61,260,629</b>
<b>Change in Net Position</b>	<b>(152,213)</b>	<b>(1,809,778)</b>
Net Position - Beginning	37,881,700	40,552,568
Adjustment to Beginning Net Position (1)	-	(861,090)
Net Position - Beginning, as Restated	37,881,700	39,691,478
<b>Net Position - Ending</b>	<b>\$ 37,729,487</b>	<b>\$ 37,881,700</b>

(1) Adjustment to beginning net position was due to the implementation of GASB Statement No. 75, which was a change in accounting principle that addresses accounting and financial reporting for other postemployment benefits.

The largest revenue source is the State of Florida (47 percent). Revenues from State sources for current operations are primarily received through the Florida Education Finance Program (FEFP) funding formula. The FEFP funding formula utilizes student enrollment data and is designed to maintain equity in funding across all Florida school districts, taking into consideration the District's funding ability based on the local property tax base. Other State revenues are primarily for meeting the requirement of the class size amendment.

Grants and contributions not restricted to specific programs increased by \$3.8 million, or 9.4 percent, primarily due to an increase in Title I grant revenues. Miscellaneous revenues increased by \$4.2 million mainly due to the recognition of insurance loss recoveries related to Hurricane Michael.

Instruction expenses represent 44.6 percent of total governmental expenses in the 2018-19 fiscal year. Overall expenses increased by \$6.2 million, or 10.2 percent since the prior fiscal year. Some areas of increased spending noted were for instruction due mainly to the increase in the Title I grant expenditures, and maintenance of plant due mainly to repairs and additional maintenance related to damage caused by Hurricane Michael during the 2018-19 fiscal year.

## FINANCIAL ANALYSIS OF THE DISTRICT'S FUNDS

### **Governmental Funds**

The focus of the District's governmental funds is to provide information on near-term inflows, outflows, and balances of spendable resources. Such information is useful in assessing the District's financing requirements. Specifically, unassigned fund balance may serve as a useful measure of a government's net resources available for discretionary use as it represents the portion of fund balance that has not been limited to a particular purpose by an external party, the District, or a group or individual delegated authority by the Board to assign resources for particular purposes.

The total fund balances of governmental funds increased by \$2.3 million during the fiscal year to \$6.8 million at June 30, 2019. Approximately 61.8 percent of this amount is unassigned fund balance (\$4.2 million), which is available for spending at the District's discretion. The remainder of the fund balance is nonspendable or restricted to indicate that it is (1) not in spendable form (\$0.2 million), or (2) restricted for particular purposes (\$2.4 million).

### **Major Governmental Funds**

The General Fund is the District's chief operating fund. At the end of the current fiscal year, unassigned fund balance is \$4.2 million, while the total fund balance is \$4.8 million. As a measure of the General Fund's liquidity, it may be useful to compare the total assigned and unassigned fund balances to General Fund total revenues. The total unassigned fund balance is 9.9 percent of the total General Fund revenues, while total fund balance represents 11.3 percent of total General Fund revenues.

Total fund balance increased by \$2.1 million during the fiscal year primarily due to the insurance loss recoveries recognized for damage caused by Hurricane Michael.

The Special Revenue – Other Fund is used by the District to account for resources of certain Federal grant programs and, for the 2018-19 fiscal year, had revenues and expenditures totaling \$11.6 million each, an increase of \$2.1 million from the 2017-18 fiscal year mainly due to the increase in the Title I

grant expenditures. Because grant revenues attributed to the Federal grants accounted for in this fund are not recognized until expenditures are incurred, this fund generally does not accumulate a fund balance.

#### GENERAL FUND BUDGETARY HIGHLIGHTS

Over the course of the year, the District revises its budget and brings amendments to the Board when needed. These amendments are needed to adjust to actual revenues received and direct resources where needed. The Board approves the final amendment to the budget after fiscal year end.

#### CAPITAL ASSETS AND LONG-TERM DEBT

##### **Capital Assets**

The District's investment in capital assets for its governmental activities as of June 30, 2019, amounts to \$60.9 million (net of accumulated depreciation). This investment in capital assets includes land; improvements other than buildings; buildings and fixed equipment; furniture, fixtures, and equipment; motor vehicles; and audio visual materials and computer software.

Additional information on the District's capital assets can be found in Notes I.F.4. and II.D. to the financial statements.

##### **Long-Term Debt**

At June 30, 2019, the District has total long-term debt outstanding of \$1.7 million related to bonds payable.

Additional information on the District's long-term debt can be found in Notes I.F.6. and II.I. to the financial statements.

#### REQUESTS FOR INFORMATION

This report is designed to provide a general overview of the District's finances for all those with an interest in the District's finances. Questions concerning information provided in the MD&A or other required supplementary information, and financial statements and notes thereto, or requests for additional financial information should be addressed to the Director of Finance, Gadsden County District School Board, 35 Martin Luther King, Jr. Boulevard, Quincy, Florida 32351.

# BASIC FINANCIAL STATEMENTS

## Gadsden County District School Board Statement of Net Position June 30, 2019

	Primary Government Governmental Activities	Component Unit
<b>ASSETS</b>		
Cash and Cash Equivalents	\$ 3,526,879.27	\$ 4,121,075.00
Investments	339.43	265,582.00
Accounts Receivable	18,108.91	231,479.00
Due from Other Agencies	6,094,505.30	-
Due from Insurer	4,922,971.47	-
Notes Receivable	656,082.61	-
Prepaid Items	-	33,277.00
Inventories	229,336.39	-
Capital Assets:		
Nondepreciable Capital Assets	1,704,688.29	474,342.00
Depreciable Capital Assets, Net	59,145,321.93	3,462,604.00
<b>TOTAL ASSETS</b>	<b>76,298,233.60</b>	<b>8,588,359.00</b>
<b>DEFERRED OUTFLOWS OF RESOURCES</b>		
Other Postemployment Benefits	269,992.00	-
Pensions	12,281,989.00	-
<b>TOTAL DEFERRED OUTFLOWS OF RESOURCES</b>	<b>12,551,981.00</b>	<b>-</b>
<b>LIABILITIES</b>		
Payroll Deductions and Withholdings	13,510.56	-
Accounts Payable	3,769,235.24	413,563.00
Accrued Interest Payable	-	40,964.00
Tax Anticipation Note	3,999,916.67	-
Unearned Revenue	176,711.00	-
Long-Term Liabilities:		
Portion Due Within 1 Year	1,118,165.26	75,985.00
Portion Due After 1 Year	35,705,493.26	1,615,421.00
<b>TOTAL LIABILITIES</b>	<b>44,783,031.99</b>	<b>2,145,933.00</b>
<b>DEFERRED INFLOWS OF RESOURCES</b>		
Other Postemployment Benefits	1,065,424.00	-
Pensions	5,272,272.00	-
<b>TOTAL DEFERRED INFLOWS OF RESOURCES</b>	<b>6,337,696.00</b>	<b>-</b>
<b>NET POSITION</b>		
Net Investment in Capital Assets	59,193,759.14	-
Restricted for:		
State Required Carryover Programs	364,542.85	-
Debt Service	339.43	-
Capital Projects	1,172,953.86	-
Food Service	1,025,930.12	-
Unrestricted	(24,028,038.79)	6,442,426.00
<b>TOTAL NET POSITION</b>	<b>\$ 37,729,486.61</b>	<b>\$ 6,442,426.00</b>

The accompanying notes to financial statements are an integral part of this statement.

**Gadsden County District School Board  
Statement of Activities  
For the Fiscal Year Ended June 30, 2019**

Functions/Programs	Program Revenues		
	Expenses	Charges for Services	Operating Grants and Contributions
<b>Primary Government</b>			
<b>Governmental Activities:</b>			
Instruction	\$ 30,091,131.69	\$ 62,253.88	\$ -
Student Support Services	2,980,204.76	-	-
Instructional Media Services	486,744.77	-	-
Instruction and Curriculum Development Services	2,360,748.27	-	-
Instructional Staff Training Services	1,669,741.19	-	-
Instruction-Related Technology	150,645.62	-	-
Board	420,711.57	-	-
General Administration	858,704.98	-	-
School Administration	3,252,448.68	-	-
Facilities Acquisition and Construction	265,755.27	-	-
Fiscal Services	671,397.24	-	-
Food Services	4,817,712.46	151,408.30	4,424,294.10
Central Services	386,655.48	-	-
Student Transportation Services	4,887,117.92	42,834.50	1,575,495.00
Operation of Plant	5,974,980.27	-	-
Maintenance of Plant	4,347,811.05	-	293,099.00
Administrative Technology Services	1,079,323.07	-	-
Unallocated Interest on Long-Term Debt	76,732.59	-	-
Unallocated Depreciation Expense*	2,711,162.44	-	-
<b>Total Primary Government</b>	<b>\$ 67,489,729.32</b>	<b>\$ 256,496.68</b>	<b>\$ 6,292,888.10</b>
<b>Component Unit</b>			
Crossroad Academy Charter School	\$ 3,562,547.00	\$ 0.00	\$ 0.00

General Revenues:

Taxes:

Property Taxes, Levied for Operational Purposes

Property Taxes, Levied for Capital Projects

Grants and Contributions Not Restricted to Specific Programs

Unrestricted Investment Earnings

Miscellaneous

**Total General Revenues**

**Change in Net Position**

Net Position - Beginning

**Net Position - Ending**

\* This amount excludes the depreciation that is included in the direct expenses of the various functions.

The accompanying notes to financial statements are an integral part of this statement.

**Net (Expense) Revenue and Changes  
in Net Position**

Capital Grants and Contributions	Primary Government Governmental Activities	Component Unit
\$ -	\$ (30,028,877.81)	\$ -
-	(2,980,204.76)	-
-	(486,744.77)	-
-	(2,360,748.27)	-
-	(1,669,741.19)	-
-	(150,645.62)	-
-	(420,711.57)	-
-	(858,704.98)	-
-	(3,252,448.68)	-
411,877.53	146,122.26	-
-	(671,397.24)	-
-	(242,010.06)	-
-	(386,655.48)	-
-	(3,268,788.42)	-
-	(5,974,980.27)	-
-	(4,054,712.05)	-
-	(1,079,323.07)	-
43,488.00	(33,244.59)	-
-	(2,711,162.44)	-
\$ 455,365.53	(60,484,979.01)	-
\$ 0.00	-	(3,562,547.00)

7,598,089.99	-
2,292,160.14	-
44,080,268.36	4,002,807.00
45,846.27	-
6,316,401.21	-
60,332,765.97	4,002,807.00
(152,213.04)	440,260.00
37,881,699.65	6,002,166.00
\$ 37,729,486.61	\$ 6,442,426.00

**Gadsden County District School Board  
Balance Sheet – Governmental Funds  
June 30, 2019**

	General Fund	Special Revenue - Other Fund	Other Governmental Funds	Total Governmental Funds
<b>ASSETS</b>				
Cash and Cash Equivalents	\$ 1,733,712.26	\$ 384.00	\$ 1,792,783.01	\$ 3,526,879.27
Investments	-	-	339.43	339.43
Accounts Receivable	11,692.84	4,715.07	1,701.00	18,108.91
Due from Other Funds	1,208,162.84	-	-	1,208,162.84
Due from Other Agencies	3,389,751.42	2,243,739.98	461,013.90	6,094,505.30
Due from Insurer	4,922,971.47	-	-	4,922,971.47
Notes Receivable	656,082.61	-	-	656,082.61
Inventories	85,524.83	-	143,811.56	229,336.39
<b>TOTAL ASSETS</b>	<b>\$ 12,007,898.27</b>	<b>\$ 2,248,839.05</b>	<b>\$ 2,399,648.90</b>	<b>\$ 16,656,386.22</b>
<b>LIABILITIES, DEFERRED INFLOWS OF RESOURCES, AND FUND BALANCES</b>				
Liabilities:				
Payroll Deductions and Withholdings	\$ 5,039.50	\$ 8,471.06	\$ -	\$ 13,510.56
Accounts Payable	2,565,440.30	1,190,272.15	13,522.79	3,769,235.24
Due to Other Funds	-	1,049,711.84	158,451.00	1,208,162.84
Tax Anticipation Note	3,999,916.67	-	-	3,999,916.67
Unearned Revenue	-	384.00	176,327.00	176,711.00
<b>Total Liabilities</b>	<b>6,570,396.47</b>	<b>2,248,839.05</b>	<b>348,300.79</b>	<b>9,167,536.31</b>
Deferred Inflows of Resources:				
Unavailable Revenue - Notes Receivable	656,082.61	-	-	656,082.61
Fund Balances:				
Nonspendable:				
Inventories	85,524.83	-	143,811.56	229,336.39
Restricted for:				
State Required Carryover Programs	364,542.85	-	-	364,542.85
Debt Service	-	-	339.43	339.43
Capital Projects	147,875.30	-	1,025,078.56	1,172,953.86
Food Service	-	-	882,118.56	882,118.56
Total Restricted Fund Balance	512,418.15	-	1,907,536.55	2,419,954.70
Unassigned Fund Balance	4,183,476.21	-	-	4,183,476.21
<b>Total Fund Balances</b>	<b>4,781,419.19</b>	<b>-</b>	<b>2,051,348.11</b>	<b>6,832,767.30</b>
<b>TOTAL LIABILITIES, DEFERRED INFLOWS OF RESOURCES, AND FUND BALANCES</b>	<b>\$ 12,007,898.27</b>	<b>\$ 2,248,839.05</b>	<b>\$ 2,399,648.90</b>	<b>\$ 16,656,386.22</b>

The accompanying notes to financial statements are an integral part of this statement.

**Gadsden County District School Board  
 Reconciliation of the Governmental Funds Balance Sheet  
 to the Statement of Net Position  
 June 30, 2019**

**Total Fund Balances - Governmental Funds** \$ 6,832,767.30

Amounts reported for governmental activities in the statement of net position are different because:

Capital assets, net of accumulated depreciation, used in governmental activities are not financial resources and, therefore, are not reported as assets in the governmental funds. 60,850,010.22

Long-term notes receivable are not available to pay for current period expenditures and, therefore, are reported as unavailable revenue on the governmental fund statements. 656,082.61

Long-term liabilities are not due and payable in the fiscal year and, therefore, are not reported as liabilities in the governmental funds. Long-term liabilities at year end consist of:

Bonds Payable	\$	(1,656,251.08)	
Compensated Absences Payable		(2,481,007.44)	
Other Postemployment Benefits Payable		(3,153,130.00)	
Net Pension Liability		<u>(29,533,270.00)</u>	(36,823,658.52)

The deferred outflows of resources and deferred inflows of resources related to pensions and other postemployment benefits (OPEB) are applicable to future periods and, therefore, are not reported in the governmental funds.

Deferred Outflows Related to OPEB	\$	269,992.00	
Deferred Outflows Related to Pensions		12,281,989.00	
Deferred Inflows Related to OPEB		(1,065,424.00)	
Deferred Inflows Related to Pensions		<u>(5,272,272.00)</u>	<u>6,214,285.00</u>

**Net Position - Governmental Activities** \$ 37,729,486.61

The accompanying notes to financial statements are an integral part of this statement.



**Gadsden County District School Board  
Statement of Revenues, Expenditures, and Changes in  
Fund Balances – Governmental Funds  
For the Fiscal Year Ended June 30, 2019**

	General Fund	Special Revenue - Other Fund	Other Governmental Funds	Total Governmental Funds
<b>Revenues</b>				
Intergovernmental:				
Federal Direct	\$ 46,638.88	\$ 2,200,263.30	\$ -	\$ 2,246,902.18
Federal Through State and Local	3,118,956.94	9,446,069.48	4,354,581.10	16,919,607.52
State	30,848,206.06	-	813,806.23	31,662,012.29
Local:				
Property Taxes	7,598,089.99	-	2,292,160.14	9,890,250.13
Charges for Services - Food Service	-	-	151,408.30	151,408.30
Miscellaneous	822,401.36	-	274,326.40	1,096,727.76
Total Local Revenues	<u>8,420,491.35</u>	<u>-</u>	<u>2,717,894.84</u>	<u>11,138,386.19</u>
<b>Total Revenues</b>	<u>42,434,293.23</u>	<u>11,646,332.78</u>	<u>7,886,282.17</u>	<u>61,966,908.18</u>
<b>Expenditures</b>				
Current - Education:				
Instruction	23,338,575.07	6,409,724.22	-	29,748,299.29
Student Support Services	1,702,333.03	1,237,976.79	-	2,940,309.82
Instructional Media Services	479,202.72	-	-	479,202.72
Instruction and Curriculum Development Services	1,134,024.91	1,192,295.20	-	2,326,320.11
Instructional Staff Training Services	231,532.89	1,419,842.92	-	1,651,375.81
Instruction-Related Technology	53,186.66	96,746.00	-	149,932.66
Board	417,642.02	-	-	417,642.02
General Administration	496,883.38	356,477.39	-	853,360.77
School Administration	3,163,982.55	36,442.76	-	3,200,425.31
Facilities Acquisition and Construction	91,907.41	-	-	91,907.41
Fiscal Services	662,780.10	-	-	662,780.10
Food Services	313,093.91	1,331.01	4,476,091.67	4,790,516.59
Central Services	325,003.77	57,317.48	-	382,321.25
Student Transportation Services	3,807,900.77	421,893.67	-	4,229,794.44
Operation of Plant	5,862,375.48	85,939.00	-	5,948,314.48
Maintenance of Plant	4,337,242.93	-	-	4,337,242.93
Administrative Technology Services	1,071,615.46	558.09	-	1,072,173.55
Fixed Capital Outlay:				
Facilities Acquisition and Construction	-	-	289,296.01	289,296.01
Other Capital Outlay	411,929.81	329,788.25	244,586.79	986,304.85
Debt Service:				
Principal	-	-	370,601.97	370,601.97
Interest and Fiscal Charges	-	-	76,732.59	76,732.59
<b>Total Expenditures</b>	<u>47,901,212.87</u>	<u>11,646,332.78</u>	<u>5,457,309.03</u>	<u>65,004,854.68</u>
<b>Excess (Deficiency) of Revenues Over Expenditures</b>	<u>(5,466,919.64)</u>	<u>-</u>	<u>2,428,973.14</u>	<u>(3,037,946.50)</u>
<b>Other Financing Sources (Uses)</b>				
Transfers In	2,393,393.25	-	401,404.74	2,794,797.99
Sale of Capital Assets	5,000.00	-	-	5,000.00
Loss Recoveries	5,380,986.10	-	-	5,380,986.10
Transfers Out	(213,662.25)	-	(2,581,135.74)	(2,794,797.99)
<b>Total Other Financing Sources (Uses)</b>	<u>7,565,717.10</u>	<u>-</u>	<u>(2,179,731.00)</u>	<u>5,385,986.10</u>
<b>Net Change in Fund Balances</b>	2,098,797.46	-	249,242.14	2,348,039.60
Fund Balances, Beginning	2,682,621.73	-	1,802,105.97	4,484,727.70
<b>Fund Balances, Ending</b>	<u>\$ 4,781,419.19</u>	<u>\$ 0.00</u>	<u>\$ 2,051,348.11</u>	<u>\$ 6,832,767.30</u>

The accompanying notes to financial statements are an integral part of this statement.

**Gadsden County District School Board  
 Reconciliation of the Governmental Funds Statement of Revenues, Expenditures,  
 and Changes in Fund Balances to the Statement of Activities  
 For the Fiscal Year Ended June 30, 2019**

**Net Change in Fund Balances - Governmental Funds** \$ 2,348,039.60

Amounts reported for governmental activities in the statement of activities are different because:

Capital outlays are reported in the governmental funds as expenditures. However, in the statement of activities, the cost of those assets is allocated over their estimated useful lives as depreciation expense. This is the amount of depreciation expense in excess of capital outlays in the current fiscal year. (1,909,056.62)

Repayment of long-term debt is an expenditure in the governmental funds, but the repayment reduces long-term liabilities in the statement of net position. This is the amount of repayments in the current fiscal year.

Note Principal Repayments	\$ 183,331.85	
Bond Principal Repayments	<u>187,270.12</u>	370,601.97

Payments received as notes receivable are reported as revenues in the fiscal year received in the fund statements. However, under full accrual, these revenues were recognized as revenue in the statement of activities in the year the note was issued. (15,378.00)

In the statement of activities, the cost of compensated absences is measured by the amounts earned during the year, while in the governmental funds, expenditures are recognized based on the amounts actually paid for compensated absences. This is the net amount of compensated absences earned in excess of the amount paid in the current fiscal year. (131,510.99)

Governmental funds report District OPEB contributions as expenditures. However, in the statement of activities, the cost of OPEB benefits earned net of employee contributions, as determined through an actuarial valuation, is reported as an OPEB expense.

Decrease in OPEB Liability	\$ 1,161,397.00	
Decrease in Deferred Outflows of Resources - OPEB	(103,531.00)	
Increase in Deferred Inflows of Resources - OPEB	<u>(913,019.00)</u>	144,847.00

Governmental funds report District pension contributions as expenditures. However, in the statement of activities, the cost of pension benefits earned net of employee contributions is reported as a pension expense.

FRS Pension Contribution	\$ 1,990,263.00	
HIS Pension Contribution	474,309.00	
FRS Pension Expense	(3,004,596.00)	
HIS Pension Expense	<u>(419,732.00)</u>	<u>(959,756.00)</u>

**Change in Net Position - Governmental Activities** **\$ (152,213.04)**

The accompanying notes to financial statements are an integral part of this statement.

**Gadsden County District School Board  
Statement of Fiduciary Assets and Liabilities – Fiduciary Funds  
June 30, 2019**

	<u>Agency Funds</u>
<b>ASSETS</b>	
Cash and Cash Equivalents	\$ <u>199,334.58</u>
<b>LIABILITIES</b>	
Internal Accounts Payable	\$ <u>199,334.58</u>

The accompanying notes to financial statements are an integral part of this statement.

# NOTES TO FINANCIAL STATEMENTS

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## I. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

### A. Description of Government-Wide Financial Statements

The government wide financial statements (i.e., the statement of net position and the statement of activities) report information on all of the nonfiduciary activities of the primary government and its component unit. All fiduciary activities are reported only in the fund financial statements. Governmental activities are normally supported by taxes, intergovernmental revenues, and other nonexchange transactions. The primary government is reported separately from the legally separate component unit for which the primary government is financially accountable.

The statement of activities presents a comparison between direct expenses and program revenues for each function or program of the Gadsden County School District's (District) governmental activities. Direct expenses are those that are specifically associated with a service, program, or department and are thereby clearly identifiable to a particular function. Depreciation expense associated with the District's transportation department is allocated to the student transportation services function, while remaining depreciation expense is not readily associated with a particular function and is reported as unallocated.

### B. Reporting Entity

The Gadsden County District School Board (Board) has direct responsibility for operation, control, and supervision of District schools and is considered a primary government for financial reporting. The District is considered part of the Florida system of public education, operates under the general direction of the Florida Department of Education (FDOE), and is governed by State law and State Board of Education (SBE) rules. The governing body of the District is the Board, which is composed of five elected members. The elected Superintendent of Schools is the executive officer of the Board. Geographic boundaries of the District correspond with those of Gadsden County.

Criteria for determining if other entities are potential component units that should be reported within the District's basic financial statements are identified and described in the Governmental Accounting Standards Board's (GASB) *Codification of Governmental Accounting and Financial Reporting Standards*, Sections 2100 and 2600. The application of these criteria provides for identification of any legally separate entities for which the Board is financially accountable and other organizations for which the nature and significance of their relationship with the Board are such that exclusion would cause the District's basic financial statements to be misleading. Based on the application of these criteria, the following component unit is included within the District's reporting entity:

**Discretely Presented Component Unit.** The component units columns in the government-wide financial statements include the financial data of the District's component unit. A separate column is used to emphasize that it is legally separate from the District.

The District's charter school, Crossroad Academy Charter School, a division of Community and Economic Development Organization of Gadsden County, Inc. is a not-for-profit corporation organized pursuant to Chapter 617, Florida Statutes, the Florida Not For Profit Corporation Act, and

Section 1002.33, Florida Statutes. The charter school operates under a charter approved by its sponsor, the Gadsden County District School Board. The charter school is considered to be a component unit of the District because the District is financially accountable for the charter school as the District established the charter school by approval of the charter, which is tantamount to the initial appointment of the charter school, and there is the potential for the charter school to impose specific financial burdens on the District. In addition, pursuant to the Florida Constitution, the charter school is a public school and the District is responsible for the operation, control, and supervision of public schools within the District.

The financial data reported on the accompanying statements was derived from the charter school's audited financial statements for the fiscal year ended June 30, 2019. The audit report is filed in the District's administrative offices at 35 Martin Luther King, Jr. Boulevard, Quincy, Florida 32351.

### **C. Basis of Presentation: Government-Wide Financial Statements**

While separate government-wide and fund financial statements are presented, they are interrelated. The governmental activities column incorporates data from governmental funds. Separate financial statements are provided for governmental funds and fiduciary funds, even though the latter are excluded from the government-wide financial statements.

The effects of interfund activity have been eliminated from the government-wide financial statements except for interfund services provided and used.

### **D. Basis of Presentation: Fund Financial Statements**

The fund financial statements provide information about the District's funds, including the fiduciary funds. Separate statements for each fund category – governmental and fiduciary – are presented. The emphasis of fund financial statements is on major governmental funds, each displayed in a separate column. All remaining governmental funds are aggregated and reported as nonmajor funds.

The District reports the following major governmental funds:

- General Fund – to account for all financial resources not required to be accounted for in another fund and for certain revenues from the State that are legally restricted to be expended for specific current operating purposes.
- Special Revenue – Other Fund – to account for certain Federal grant program resources.

Additionally, the District reports the following fiduciary fund type:

- Agency Funds – to account for resources of the school internal funds, which are used to administer moneys collected at several schools in connection with school, student athletic, class, and club activities.

During the course of operations, the District has activity between funds for various purposes. Any residual balances outstanding at fiscal year end are reported as due from/to other funds. While these balances are reported in fund financial statements, certain eliminations are made in the preparation of the government-wide financial statements. Further, certain activity occurs during the year involving transfers of resources between funds. In fund financial statements, these amounts are reported at gross amounts as transfers in and out. While reported in fund financial statements, transfers between

the funds included in governmental activities are eliminated in the preparation of the government-wide statements.

## **E. Measurement Focus and Basis of Accounting**

The accounting and financial reporting treatment is determined by the applicable measurement focus and basis of accounting. Measurement focus indicates the type of resources being measured such as current financial resources or economic resources. The basis of accounting indicates the timing of transactions or events for recognition in the financial statements.

The government wide financial statements are reported using the economic resources measurement focus and the accrual basis of accounting. Revenues are recognized when earned and expenses are recognized when a liability is incurred, regardless of the timing of the related cash flows. Property taxes are recognized in the year for which they are levied. Revenues from grants, entitlements, and donations are recognized as soon as all eligibility requirements imposed by the provider have been met.

The governmental fund financial statements are reported using the current financial resources measurement focus and the modified accrual basis of accounting. Revenues, except for certain grant revenues, are recognized as soon as they are both measurable and available. Revenues are considered to be available when they are collectible within the current period or soon enough thereafter to pay liabilities of the current period. For this purpose, the District considers revenues to be available if they are collected within 60 days of the end of the current fiscal year. When grant terms provide that the expenditure of resources is the prime factor for determining eligibility for Federal, State, and other grant resources, revenue is recognized at the time the expenditure is made. Entitlements are recorded as revenues when all eligibility requirements are met, including any time requirements, and the amount is received during the period or within the availability period for this revenue source (within 60 days of year end). Property taxes associated with the current fiscal period are all considered to be susceptible to accrual and so have been recognized as revenues of the current fiscal period. Expenditures are generally recognized when the related fund liability is incurred, as under accrual accounting. However, debt service expenditures, claims and judgments, pension benefits, other postemployment benefits, and compensated absences, are only recorded when payment is due. General capital asset acquisitions are reported as expenditures in governmental funds. Issuance of long-term debt and acquisitions under capital leases are reported as other financing sources. Allocations of cost, such as depreciation, are not recognized in governmental funds.

The agency funds have no measurement focus but utilize the accrual basis of accounting for reporting assets and liabilities.

The charter school is accounted for under the not-for-profit basis of accounting and uses the accrual basis of accounting whereby revenues are recognized when earned and expenses are recognized when incurred.

## **F. Assets, Liabilities, Deferred Outflows/Inflows of Resources, and Net Position/Fund Balance**

### **1. Cash and Cash Equivalents**

The District's cash and cash equivalents are considered to be cash on hand, demand deposits, and short-term liquid investments with original maturities of 3 months or less from the date of acquisition. Investments classified as cash equivalents include amounts placed with the State Board of Administration (SBA) in Florida PRIME.

Cash deposits are held by banks qualified as public depositories under Florida law. All deposits are insured by Federal depository insurance, up to specified limits, or collateralized with securities held in Florida's multiple financial institution collateral pool as required by Chapter 280, Florida Statutes.

### **2. Investments**

Investments consist of amounts placed in the SBA debt service accounts for investment of debt service moneys and amounts placed with the SBA for participation in the Florida PRIME investment pool created by Section 218.405, Florida Statutes. The investment pool operates under investment guidelines established by Section 215.47, Florida Statutes.

The District's investments in Florida PRIME, which the SBA indicates is a Securities and Exchange Commission Rule 2a7-like external investment pool, are similar to money market funds in which shares are owned in the fund rather than the underlying investments. These investments are reported at fair value, which is amortized cost.

Types and amounts of investments held at fiscal year end are described in a subsequent note.

### **3. Inventories**

Inventories consist of expendable supplies held for consumption in the course of District operations. Inventories are stated at cost on the first-in, first-out basis for maintenance department inventories; moving weighted-average for transportation inventories; and last invoice cost, which approximated the first-in, first-out basis for purchased foods and nonfood inventories, except that United States Department of Agriculture donated foods are stated at their fair value as determined at the time of donation to the District's food service program by the Florida Department of Agriculture and Consumer Services, Bureau of Food Distribution. The costs of inventories are recorded as expenditures when used rather than purchased.

### **4. Capital Assets**

Expenditures for capital assets acquired or constructed for general District purposes are reported in the governmental fund that financed the acquisition or construction. The capital assets so acquired are reported at cost in the government-wide statement of net position but are not reported in the governmental fund financial statements. Capital assets are defined by the District as those costing more than \$750. Such assets are recorded at historical cost or estimated historical cost if purchased or constructed. Donated assets are recorded at acquisition value at the date of donation.

Capital assets are depreciated using the straight line method over the following estimated useful lives:

<u>Description</u>	<u>Estimated Useful Lives</u>
Improvements Other Than Buildings	10 - 35 years
Buildings and Fixed Equipment	15 - 50 years
Furniture, Fixtures, and Equipment	5 - 7 years
Motor Vehicles	5 - 10 years
Audio Visual Materials and Computer Software	3 - 5 years

Current year information relative to changes in capital assets is described in a subsequent note.

## **5. Pensions**

In the government-wide statement of net position, liabilities are recognized for the District's proportionate share of each pension plan's net pension liability. For purposes of measuring the net pension liability, deferred outflows of resources and deferred inflows of resources related to pensions, and pension expense, information about the fiduciary net position of the Florida Retirement System (FRS) defined benefit plan and the Health Insurance Subsidy (HIS) defined benefit plan and additions to/deductions from the FRS and the HIS fiduciary net position have been determined on the same basis as they are reported by the FRS and the HIS plans. For this purpose, benefit payments (including refunds of employee contributions) are recognized when due and payable in accordance with benefit terms. Investments are reported at fair value.

The District's retirement plans and related amounts are described in a subsequent note.

## **6. Long-Term Liabilities**

Long-term obligations that will be financed from resources to be received in the future by governmental funds are reported as liabilities in the government-wide statement of net position.

In the governmental fund financial statements, bonds and other long-term obligations are not recognized as liabilities until due.

Changes in long-term liabilities for the current year are reported in a subsequent note.

## **7. Deferred Outflows/Inflows of Resources**

In addition to assets, the statement of net position reports a separate section for deferred outflows of resources. This separate financial statement element, *deferred outflows of resources*, represents a consumption of net position that applies to future periods and so will not be recognized as an outflow of resources (expense) until then. The District has two items that qualify for reporting in this category. The deferred outflows of resources related to pensions and OPEB are discussed in subsequent notes.

In addition to liabilities, the statement of net position and the governmental funds balance sheet report a separate section for deferred inflows of resources. This separate financial statement element, *deferred inflows of resources*, represents an acquisition of net position that applies to future periods and so will not be recognized as an inflow of resources (revenue) until that time.



The District has three items that qualify for reporting in this category. The deferred inflows of resources related to pensions and OPEB are discussed in subsequent notes. The remaining item, unavailable revenue from a notes receivable, is reported in the governmental funds balance sheet and is deferred and will be recognized as an inflow of resources in the period that it becomes available.

## **8. Net Position Flow Assumption**

The District occasionally funds outlays for a particular purpose from both restricted (e.g., restricted bond or grant proceeds) and unrestricted resources. To calculate the amounts to report as restricted net position and unrestricted net position in the government-wide financial statements, a flow assumption must be made about the order in which the resources are considered to be applied. Consequently, it is the District's policy to consider restricted net position to have been depleted before unrestricted net position is applied.

## **9. Fund Balance Flow Assumptions**

The District may fund outlays for a particular purpose from both restricted and unrestricted resources (the total of committed, assigned, and unassigned fund balance). To calculate the amounts to report as restricted, committed, assigned, and unassigned fund balance in the governmental fund financial statements, a flow assumption must be made about the order in which the resources are considered to be applied. It is the District's policy to consider restricted fund balance to have been depleted before using any of the components of unrestricted fund balance. Further, when components of unrestricted fund balance can be used for the same purpose, committed fund balance is depleted first, followed by assigned fund balance. Unassigned fund balance is applied last.

## **10. Fund Balance Policies**

Fund balance of governmental funds is reported in various categories based on the nature of any limitations requiring the use of resources for specific purposes. The District itself can establish limitations on the use of resources through either a commitment (committed fund balance) or an assignment (assigned fund balance).

The committed fund balance classification includes amounts that can be used only for the specific purposes determined by a formal action of the District's highest level of decision-making authority. The Board is the highest level of decision-making authority for the District that can, by adoption of a resolution prior to the end of the fiscal year, commit fund balance. Once adopted, the limitation imposed by the resolution remains in place until a similar action is taken (the adoption of another resolution) to remove or revise the limitation. The District reported no committed fund balances at June 30, 2019.

Amounts in the assigned fund balance classification are intended to be used by the District for specific purposes but do not meet the criteria to be classified as committed. The Board has, by approval of the annual financial report, authorized the assignment of fund balance. The Board may also assign fund balance as it does when appropriating fund balance to cover a gap between estimated revenue and appropriations in the subsequent year's appropriated budget. Unlike

commitments, assignments generally only exist temporarily. In other words, an additional action does not normally have to be taken for the removal of an assignment. Conversely, as discussed above, an additional action is essential to either remove or revise a commitment.

## **G. Revenues and Expenditures/Expenses**

### **1. Program Revenues**

Amounts reported as program revenues include charges paid by the recipient of the goods or services offered by the program and grants and contributions that are restricted to meeting the operational or capital requirements of a particular program. All taxes, including those dedicated for specific purposes, and other internally dedicated resources are reported as general revenues rather than program revenues. Revenues that are not classified as program revenues are presented as general revenues. The comparison of direct expenses with program revenues identifies the extent to which each governmental function is self-financing or draws from the general revenues of the District.

### **2. State Revenue Sources**

Significant revenues from State sources for current operations include the Florida Education Finance Program administered by the FDOE under the provisions of Section 1011.62, Florida Statutes. In accordance with this law, the District determines and reports the number of full-time equivalent (FTE) students and related data to the FDOE. The FDOE performs certain edit checks on the reported number of FTE and related data and calculates the allocation of funds to the District. The District is permitted to amend its original reporting during specified time periods following the date of the original reporting. The FDOE may also adjust subsequent fiscal period allocations based upon an audit of the District's compliance in determining and reporting FTE and related data. Normally, such adjustments are treated as reductions or additions of revenue in the fiscal year when the adjustments are made.

The State provides financial assistance to administer certain educational programs. SBE rules require that revenue earmarked for certain programs be expended only for the program for which the money is provided, and require that the money not expended as of the close of the fiscal year be carried forward into the following fiscal year to be expended for the same educational programs. The FDOE generally requires that these educational program revenues be accounted for in the General Fund. A portion of the fund balance of the General Fund is restricted in the governmental fund financial statements for the balance of categorical and earmarked educational program resources.

The State allocates gross receipts taxes, generally known as Public Education Capital Outlay money, to the District on an annual basis. The District also received an allocation under the Educational Facilities Security Grant. The District is authorized to expend these funds only upon applying for and receiving an encumbrance authorization from the FDOE. Accordingly, the District recognizes its allocation of the Educational Facilities Security Grant as unearned revenue until such time as an encumbrance authorization is received.

A schedule of revenue from State sources for the current year is presented in a subsequent note.

### **3. District Property Taxes**

The Board is authorized by State law to levy property taxes for district school operations, capital improvements, and debt service.

Property taxes consist of ad valorem taxes on real and personal property within the District. Property values are determined by the Gadsden County Property Appraiser, and property taxes are collected by the Gadsden County Tax Collector.

The Board adopted the 2018 tax levy on September 4, 2018. Tax bills are mailed in October and taxes are payable between November 1 of the year assessed and March 31 of the following year at discounts of up to 4 percent for early payment.

Taxes become a lien on the property on January 1 and are delinquent on April 1 of the year following the year of assessment. State law provides for enforcement of collection of personal property taxes by seizure of the property to satisfy unpaid taxes and for enforcement of collection of real property taxes by the sale of interest-bearing tax certificates to satisfy unpaid taxes. The procedures result in the collection of essentially all taxes prior to June 30 of the year following the year of assessment.

Property tax revenues are recognized in the government wide financial statements when the Board adopts the tax levy. Property tax revenues are recognized in the governmental fund financial statements when taxes are received by the District, except that revenue is accrued for taxes collected by the Gadsden County Tax Collector at fiscal year end but not yet remitted to the District.

Millages and taxes levied for the current year are presented in a subsequent note.

### **4. Federal Revenue Sources**

The District receives Federal awards for the enhancement of various educational programs. Federal awards are generally received based on applications submitted to, and approved by, various granting agencies. For Federal awards in which a claim to these grant proceeds is based on incurring eligible expenditures, revenue is recognized to the extent that eligible expenditures have been incurred. The FDOE may require adjustments to subsequent fiscal period expenditures and related revenues based upon an audit of the district's compliance with applicable Federal awards requirements. Normally, such adjustments are treated as reductions of expenditures and related revenues in the fiscal year when the adjustments are made.

### **5. Compensated Absences**

In the government-wide financial statements, compensated absences (i.e., paid absences for employee vacation leave and sick leave) are accrued as liabilities to the extent that it is probable that the benefits will result in termination payments. A liability for these amounts is reported in the governmental fund financial statements only if it has matured, such as for occurrences of employee resignations and retirements. The liability for compensated absences includes salary-related benefits, where applicable.

## II. DETAILED NOTES ON ALL ACTIVITIES AND FUNDS

### A. Cash Deposits with Financial Institutions

**Custodial Credit Risk.** In the case of deposits, this is the risk that, in the event of the failure of a depository financial institution, the District will not be able to recover deposits or will not be able to recover collateral securities that are in the possession of an outside party. The District does not have a policy for custodial credit risk. All bank balances of the District are fully insured or collateralized as required by Chapter 280, Florida Statutes.

### B. Investments

The District's investments at June 30, 2019, are reported as follows:

<u>Investments</u>	<u>Maturities</u>	<u>Fair Value</u>
SBA:		
Florida PRIME (1)	28 Day Average	\$ 628,326.13
Debt Service Accounts	6 Months	<u>339.43</u>
<b>Total Investments</b>		<u>\$ 628,665.56</u>

(1) This investment is reported as a cash equivalent for financial statement reporting purposes.

### Fair Value Measurement

The District categorizes its fair value measurements within the fair value hierarchy established by generally accepted accounting principles. The hierarchy is based on the valuation inputs used to measure the fair value of the asset. Level 1 inputs are quoted prices in active markets for identical assets; Level 2 inputs are significant other observable inputs; and Level 3 inputs are significant unobservable inputs. The District's investments in SBA debt service accounts are valued using Level 1 inputs.

### Interest Rate Risk

Interest rate risk is the risk that changes in interest rates will adversely affect the fair value of an investment. The District's investment policy does not limit investment maturities as a means of managing its exposure to fair value losses from increasing interest rates.

Florida PRIME uses a weighted average days to maturity (WAM). A portfolio's WAM reflects the average maturity in days based on final maturity or reset date, in the case of floating rate instruments. WAM measures the sensitivity of the portfolio to interest rate changes.

For Florida PRIME, with regard to redemption gates, Section 218.409(8)(a), Florida Statutes, states, "The principal, and any part thereof, of each account constituting the trust fund is subject to payment at any time from the moneys in the trust fund. However, the executive director may, in good faith, on the occurrence of an event that has a material impact on liquidity or operations of the trust fund, for 48 hours limit contributions to or withdrawals from the trust fund to ensure that the board [State Board of Administration] can invest moneys entrusted to it in exercising its fiduciary responsibility. Such action must be immediately disclosed to all participants, the trustees, the Joint Legislative Auditing Committee, and the Investment Advisory Council. The trustees shall convene an emergency meeting

as soon as practicable from the time the executive director has instituted such measures and review the necessity of those measures. If the trustees are unable to convene an emergency meeting before the expiration of the 48-hour moratorium on contributions and withdrawals, the moratorium may be extended by the executive director until the trustees are able to meet to review the necessity for the moratorium. If the trustees agree with such measures, the trustees shall vote to continue the measures for up to an additional 15 days. The trustees must convene and vote to continue any such measures before the expiration of the time limit set, but in no case may the time limit set by the trustees exceed 15 days." As of June 30, 2019, there were no redemption fees, maximum transaction amounts, or any other requirements that serve to limit a participant's daily access to 100 percent of their account value.

### **Credit Risk**

Credit risk is the risk that an issuer or other counterparty to an investment will not fulfill its obligations. Section 218.415(17), Florida Statutes, limits investments to the Local Government Surplus Funds Trust Fund [Florida PRIME], or any intergovernmental investment pool authorized pursuant to the Florida Interlocal Cooperation Act as provided in Section 163.01, Florida Statutes; Securities and Exchange Commission registered money market funds with the highest credit quality rating from a nationally recognized rating agency; interest-bearing time deposits or savings accounts in qualified public depositories, as defined in Section 280.02, Florida Statutes; and direct obligations of the United States Treasury. The District's investment policy does not further limit its investment choices.

The District's investments in the SBA debt service accounts are to provide for debt service payments on bond debt issued by the SBE for the benefit of the District. The District relies on policies developed by the SBA for managing interest rate risk and credit risk for this account. Disclosures for the Debt Service Accounts are included in the notes to financial statements of the State's Comprehensive Annual Financial Report.

The District's investment in Florida PRIME is rated AAAM by Standard & Poor's.

### **C. Notes Receivables**

The District sold Chattahoochee High School, Havana North Side High School, and Greensboro Elementary School each to a separate not-for-profit corporation, and as part of the sales agreement, the District issued and held interest bearing notes receivable in the amount of the sales price. The first note was for \$500,000, bearing interest at 1 percent per annum, payable in monthly installments of \$2,299.47 until paid-in-full with the first installment received February 1, 2011. The second note was for \$205,000, bearing interest at 1 percent per annum, payable in monthly installments of \$948.78 until paid-in-full with the first installment received July 1, 2012. The third note was for \$220,000, bearing interest at 1 percent per annum, payable in monthly installments of \$1,011.77 until paid-in-full with the first installment received January 1, 2013. At June 30, 2019, the District's remaining notes receivable balance was \$656,082.61.

## D. Changes in Capital Assets

Changes in capital assets are presented in the following table:

	Beginning Balance	Additions	Deletions	Ending Balance
GOVERNMENTAL ACTIVITIES				
Capital Assets Not Being Depreciated:				
Land	\$ 1,704,688.29	\$ -	\$ -	\$ 1,704,688.29
Capital Assets Being Depreciated:				
Improvements Other Than Buildings	5,682,254.53	582,887.41	-	6,265,141.94
Buildings and Fixed Equipment	97,176,831.51	-	-	97,176,831.51
Furniture, Fixtures, and Equipment	5,476,429.27	692,713.45	575,096.72	5,594,046.00
Motor Vehicles	7,238,508.97	-	442,706.00	6,795,802.97
Audio Visual Materials and Computer Software	162,729.95	-	-	162,729.95
Total Capital Assets Being Depreciated	115,736,754.23	1,275,600.86	1,017,802.72	115,994,552.37
Less Accumulated Depreciation for:				
Improvements Other Than Buildings	3,842,343.95	133,793.02	-	3,976,136.97
Buildings and Fixed Equipment	40,029,198.34	2,090,960.67	-	42,120,159.01
Furniture, Fixtures, and Equipment	5,068,317.28	453,862.76	575,096.72	4,947,083.32
Motor Vehicles	5,709,970.12	473,495.04	442,706.00	5,740,759.16
Audio Visual Materials and Computer Software	32,545.99	32,545.99	-	65,091.98
Total Accumulated Depreciation	54,682,375.68	3,184,657.48	1,017,802.72	56,849,230.44
Total Capital Assets Being Depreciated, Net	61,054,378.55	(1,909,056.62)	-	59,145,321.93
Governmental Activities Capital Assets, Net	\$ 62,759,066.84	\$ (1,909,056.62)	\$ 0.00	\$ 60,850,010.22

Depreciation expense was charged to functions as follows:

Function	Amount
GOVERNMENTAL ACTIVITIES	
Student Transportation Services	\$ 473,495.04
Unallocated	2,711,162.44
Total Depreciation Expense - Governmental Activities	\$ 3,184,657.48

## E. Retirement Plans

### 1. FRS – Defined Benefit Pension Plans

#### General Information about the FRS

The FRS was created in Chapter 121, Florida Statutes, to provide a defined benefit pension plan for participating public employees. The FRS was amended in 1998 to add the Deferred Retirement Option Program (DROP) under the defined benefit plan and amended in 2000 to provide a defined contribution plan alternative to the defined benefit plan for FRS members effective July 1, 2002. This integrated defined contribution pension plan is the FRS Investment Plan. Chapter 112, Florida Statutes, established the Retiree HIS Program, a cost-sharing multiple-employer defined benefit pension plan, to assist retired members of any State-administered retirement system in paying the costs of health insurance.

Essentially all regular employees of the District are eligible to enroll as members of the State-administered FRS. Provisions relating to the FRS are established by Chapters 121 and 122, Florida Statutes; Chapter 112, Part IV, Florida Statutes; Chapter 238, Florida Statutes; and FRS Rules, Chapter 60S, Florida Administrative Code; wherein eligibility, contributions, and benefits are defined and described in detail. Such provisions may be amended at any time by further action from the Florida Legislature. The FRS is a single retirement system administered by the Florida Department of Management Services, Division of Retirement, and consists of the two cost-sharing multiple-employer defined benefit plans and other nonintegrated programs. A comprehensive annual financial report of the FRS, which includes its financial statements, required supplementary information, actuarial report, and other relevant information, is available from the Florida Department of Management Services Web site ([www.dms.myflorida.com](http://www.dms.myflorida.com)).

The District's FRS and HIS pension expense totaled \$3,424,328 for the fiscal year ended June 30, 2019.

### **FRS Pension Plan**

Plan Description. The FRS Pension Plan (Plan) is a cost-sharing multiple-employer defined benefit pension plan, with a DROP for eligible employees. The general classes of membership are:

- *Regular* – Members of the FRS who do not qualify for membership in the other classes.
- *Elected County Officers* – Members who hold specified elective offices in local government.

Employees enrolled in the Plan prior to July 1, 2011, vest at 6 years of creditable service and employees enrolled in the Plan on or after July 1, 2011, vest at 8 years of creditable service. All vested members, enrolled prior to July 1, 2011, are eligible for normal retirement benefits at age 62 or at any age after 30 years of service. All members enrolled in the Plan on or after July 1, 2011, once vested, are eligible for normal retirement benefits at age 65 or any time after 33 years of creditable service. Employees enrolled in the Plan may include up to 4 years of credit for military service toward creditable service. The Plan also includes an early retirement provision; however, there is a benefit reduction for each year a member retires before his or her normal retirement date. The Plan provides retirement, disability, death benefits, and annual cost-of-living adjustments to eligible participants.

The DROP, subject to provisions of Section 121.091, Florida Statutes, permits employees eligible for normal retirement under the Plan to defer receipt of monthly benefit payments while continuing employment with an FRS participating employer. An employee may participate in DROP for a period not to exceed 60 months after electing to participate, except that certain instructional personnel may participate for up to 96 months. During the period of DROP participation, deferred monthly benefits are held in the FRS Trust Fund and accrue interest. The net pension liability does not include amounts for DROP participants, as these members are considered retired and are not accruing additional pension benefits.

Benefits Provided. Benefits under the Plan are computed on the basis of age and/or years of service, average final compensation, and service credit. Credit for each year of service is

expressed as a percentage of the average final compensation. For members initially enrolled before July 1, 2011, the average final compensation is the average of the 5 highest fiscal years' earnings; for members initially enrolled on or after July 1, 2011, the average final compensation is the average of the 8 highest fiscal years' earnings. The total percentage value of the benefit received is determined by calculating the total value of all service, which is based on the retirement class to which the member belonged when the service credit was earned. Members are eligible for in-line-of-duty or regular disability and survivors' benefits. The following table shows the percentage value for each year of service credit earned:

<u>Class, Initial Enrollment, and Retirement Age/Years of Service</u>	<u>Percent Value</u>
<b>Regular Members Initially Enrolled Before July 1, 2011</b>	
Retirement up to age 62 or up to 30 years of service	1.60
Retirement at age 63 or with 31 years of service	1.63
Retirement at age 64 or with 32 years of service	1.65
Retirement at age 65 or with 33 or more years of service	1.68
<b>Regular Members Initially Enrolled On or After July 1, 2011</b>	
Retirement up to age 65 or up to 33 years of service	1.60
Retirement at age 66 or with 34 years of service	1.63
Retirement at age 67 or with 35 years of service	1.65
Retirement at age 68 or with 36 or more years of service	1.68
<b>Elected County Officers</b>	3.00

As provided in Section 121.101, Florida Statutes, if the member was initially enrolled in the Plan before July 1, 2011, and all service credit was accrued before July 1, 2011, the annual cost-of-living adjustment is 3 percent per year. If the member was initially enrolled before July 1, 2011, and has service credit on or after July 1, 2011, there is an individually calculated cost-of-living adjustment. The annual cost-of-living adjustment is a proportion of 3 percent determined by dividing the sum of the pre-July 2011 service credit by the total service credit at retirement multiplied by 3 percent. Plan members initially enrolled on or after July 1, 2011, will not have a cost-of-living adjustment after retirement.

Contributions. The Florida Legislature establishes contribution rates for participating employers and employees. Contribution rates during the 2018-19 fiscal year were as follows:

<u>Class</u>	<u>Percent of Gross Salary</u>	
	<u>Employee</u>	<u>Employer (1)</u>
FRS, Regular	3.00	8.26
FRS, Elected County Officers	3.00	48.70
DROP – Applicable to Members from All of the Above Classes	0.00	14.03
FRS, Reemployed Retiree	(2)	(2)

(1) Employer rates include 1.66 percent for the postemployment health insurance subsidy. Also, employer rates, other than for DROP participants, include 0.06 percent for administrative costs of the Investment Plan.

(2) Contribution rates are dependent upon retirement class in which reemployed.

The District's contributions to the Plan totaled \$1,990,263 for the fiscal year ended June 30, 2019.



Pension Liabilities, Pension Expense, and Deferred Outflows of Resources and Deferred Inflows of Resources Related to Pensions. At June 30, 2019, the District reported a liability of \$20,209,622 for its proportionate share of the Plan's net pension liability. The net pension liability was measured as of June 30, 2018, and the total pension liability used to calculate the net pension liability was determined by an actuarial valuation as of July 1, 2018. The District's proportionate share of the net pension liability was based on the District's 2017-18 fiscal year contributions relative to the total 2017-18 fiscal year contributions of all participating members. At June 30, 2018, the District's proportionate share was 0.067095864 percent, which was a decrease of 0.002354962 from its proportionate share measured as of June 30, 2017.

For the fiscal year ended June 30, 2019, the District recognized the Plan pension expense of \$3,004,596. In addition, the District reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

<u>Description</u>	<u>Deferred Outflows of Resources</u>	<u>Deferred Inflows of Resources</u>
Differences Between Expected and Actual Experience	\$ 1,712,059	\$ 62,140
Change of Assumptions	6,603,522	-
Net Difference Between Projected and Actual Earnings on FRS Pension Plan Investments	-	1,561,440
Changes in Proportion and Differences Between District FRS Contributions and Proportionate Share of Contributions	133,336	1,434,905
District FRS Contributions Subsequent to the Measurement Date	1,990,263	-
<b>Total</b>	<b>\$ 10,439,180</b>	<b>\$ 3,058,485</b>

The deferred outflows of resources related to pensions resulting from District contributions to the Plan subsequent to the measurement date, totaling \$1,990,263, will be recognized as a reduction of the net pension liability in the fiscal year ending June 30, 2020. Other amounts reported as deferred outflows of resources and deferred inflows of resources related to pensions will be recognized in pension expense as follows:

<u>Fiscal Year Ending June 30</u>	<u>Amount</u>
2020	\$ 2,124,353
2021	1,386,069
2022	(13,134)
2023	1,068,031
2024	734,340
Thereafter	90,773
<b>Total</b>	<b>\$ 5,390,432</b>

Actuarial Assumptions. The total pension liability in the July 1, 2018, actuarial valuation was determined using the following actuarial assumptions, applied to all periods included in the measurement:

Inflation	2.60 percent
Salary Increases	3.25 percent, average, including inflation
Investment Rate of Return	7.00 percent, net of pension plan investment expense, including inflation

Mortality rates were based on the Generational RP-2000 with Projection Scale BB.

The actuarial assumptions used in the July 1, 2018, valuation were based on the results of an actuarial experience study for the period July 1, 2008, through June 30, 2013.

The long-term expected rate of return on pension plan investments was not based on historical returns, but instead is based on a forward-looking capital market economic model. The allocation policy's description of each asset class was used to map the target allocation to the asset classes shown below. Each asset class assumption is based on a consistent set of underlying assumptions and includes an adjustment for the inflation assumption. The target allocation and best estimates of arithmetic and geometric real rates of return for each major asset class are summarized in the following table:

<u>Asset Class</u>	<u>Target Allocation (1)</u>	<u>Annual Arithmetic Return</u>	<u>Compound Annual (Geometric) Return</u>	<u>Standard Deviation</u>
Cash	1%	2.9%	2.9%	1.8%
Fixed Income	18%	4.4%	4.3%	4.0%
Global Equity	54%	7.6%	6.3%	17.0%
Real Estate (Property)	11%	6.6%	6.0%	11.3%
Private Equity	10%	10.7%	7.8%	26.5%
Strategic Investments	6%	6.0%	5.7%	8.6%
<b>Total</b>	<u>100%</u>			
Assumed inflation - Mean			2.6%	1.9%

(1) As outlined in the Plan's investment policy.

Discount Rate. The discount rate used to measure the total pension liability was 7 percent. The Plan's fiduciary net position was projected to be available to make all projected future benefit payments of current active and inactive employees. Therefore, the discount rate for calculating the total pension liability is equal to the long-term expected rate of return. The discount rate used in the 2018 valuation was updated from 7.1 percent to 7 percent.

Sensitivity of the District's Proportionate Share of the Net Pension Liability to Changes in the Discount Rate. The following presents the District's proportionate share of the net pension liability calculated using the discount rate of 7 percent, as well as what the District's proportionate share of the net pension liability would be if it were calculated using a discount rate that is 1 percentage point lower (6 percent) or 1 percentage point higher (8 percent) than the current rate:

	1% Decrease (6%)	Current Discount Rate (7%)	1% Increase (8%)
District's Proportionate Share of the Net Pension Liability	\$ 36,883,408	\$ 20,209,622	\$ 6,361,057

Pension Plan Fiduciary Net Position. Detailed information about the Plan's fiduciary net position is available in the separately issued FRS Pension Plan and Other State Administered Systems Comprehensive Annual Financial Report.

### **HIS Pension Plan**

Plan Description. The HIS Pension Plan (HIS Plan) is a cost-sharing multiple-employer defined benefit pension plan established under Section 112.363, Florida Statutes, and may be amended by the Florida Legislature at any time. The benefit is a monthly payment to assist retirees of State-administered retirement systems in paying their health insurance costs and is administered by the Florida Department of Management Services, Division of Retirement.

Benefits Provided. For the fiscal year ended June 30, 2019, eligible retirees and beneficiaries received a monthly HIS payment of \$5 for each year of creditable service completed at the time of retirement, with a minimum HIS payment of \$30 and a maximum HIS payment of \$150 per month, pursuant to Section 112.363, Florida Statutes. To be eligible to receive a HIS Plan benefit, a retiree under a State-administered retirement system must provide proof of health insurance coverage, which may include Federal Medicare.

Contributions. The HIS Plan is funded by required contributions from FRS participating employers as set by the Florida Legislature. Employer contributions are a percentage of gross compensation for all active FRS members. For the fiscal year ended June 30, 2019, the contribution rate was 1.66 percent of payroll pursuant to Section 112.363, Florida Statutes. The District contributed 100 percent of its statutorily required contributions for the current and preceding 3 years. HIS Plan contributions are deposited in a separate trust fund from which payments are authorized. HIS Plan benefits are not guaranteed and are subject to annual legislative appropriation. In the event the legislative appropriation or available funds fail to provide full subsidy benefits to all participants, benefits may be reduced or canceled.

The District's contributions to the HIS Plan totaled \$474,309 for the fiscal year ended June 30, 2019.

Pension Liabilities, Pension Expense, and Deferred Outflows of Resources and Deferred Inflows of Resources Related to Pensions. At June 30, 2019, the District reported a net pension liability of \$9,323,648 for its proportionate share of the HIS Plan's net pension liability. The current portion of the net pension liability is the District's proportionate share of benefit payments expected to be paid within 1 year, net of the District's proportionate share of the HIS Plan's fiduciary net position available to pay that amount. The net pension liability was measured as of June 30, 2018, and the total pension liability used to calculate the net pension liability was determined by an actuarial valuation as of July 1, 2018. The District's proportionate share of the net pension liability was based on the District's 2017-18 fiscal year contributions relative to the total 2017-18 fiscal year

contributions of all participating members. At June 30, 2018, the District's proportionate share was 0.088090966 percent, which was a decrease of 0.006153005 from its proportionate share measured as of June 30, 2017.

For the fiscal year ended June 30, 2019, the District recognized the HIS Plan pension expense of \$419,732. In addition, the District reported deferred outflows of resources and deferred inflows of resources related to pensions from the following sources:

<u>Description</u>	<u>Deferred Outflows of Resources</u>	<u>Deferred Inflows of Resources</u>
Differences Between Expected and Actual Experience	\$ 142,741	\$ 15,841
Change of Assumptions	1,036,905	985,774
Net Difference Between Projected and Actual Earnings on HIS Pension Plan Investments	5,628	-
Changes in Proportion and Differences Between District HIS Contributions and Proportionate Share of Contributions	183,226	1,212,172
District HIS Contributions Subsequent to the Measurement Date	474,309	-
<b>Total</b>	<b>\$ 1,842,809</b>	<b>\$ 2,213,787</b>

The deferred outflows of resources related to pensions resulting from District contributions to the HIS Plan subsequent to the measurement date, totaling \$474,309, will be recognized as a reduction of the net pension liability in the fiscal year ending June 30, 2020. Other amounts reported as deferred outflows of resources and deferred inflows of resources related to pensions will be recognized in pension expense as follows:

<u>Fiscal Year Ending June 30</u>	<u>Amount</u>
2020	\$ (145,745)
2021	(146,219)
2022	(109,447)
2023	(102,322)
2024	(187,488)
Thereafter	(154,066)
<b>Total</b>	<b>\$ (845,287)</b>

Actuarial Assumptions. The total pension liability in the July 1, 2018, actuarial valuation was determined using the following actuarial assumptions, applied to all periods included in the measurement:

Inflation	2.60 percent
Salary Increases	3.25 percent, average, including inflation
Municipal Bond Rate	3.87 percent

Mortality rates were based on the Generational RP-2000 with Projection Scale BB.

While an experience study had not been completed for the HIS Plan, the actuarial assumptions that determined the total pension liability for the HIS Plan were based on certain results of the most recent experience study for the FRS Plan.

Discount Rate. The discount rate used to measure the total pension liability was 3.87 percent. In general, the discount rate for calculating the total pension liability is equal to the single rate equivalent to discounting at the long-term expected rate of return for benefit payments prior to the projected depletion date. Because the HIS benefit is essentially funded on a pay-as-you-go basis, the depletion date is considered to be immediate, and the single equivalent discount rate is equal to the municipal bond rate selected by the HIS Plan sponsor. The Bond Buyer General Obligation 20-Bond Municipal Bond Index was adopted as the applicable municipal bond index. The discount rate changed from 3.58 percent to 3.87 percent.

Sensitivity of the District's Proportionate Share of the Net Pension Liability to Changes in the Discount Rate. The following presents the District's proportionate share of the net pension liability calculated using the discount rate of 3.87 percent, as well as what the District's proportionate share of the net pension liability would be if it were calculated using a discount rate that is 1 percentage point lower (2.87 percent) or 1 percentage point higher (4.87 percent) than the current rate:

	1% Decrease (2.87%)	Current Discount Rate (3.87%)	1% Increase (4.87%)
District's Proportionate Share of the Net Pension Liability	\$ 10,619,087	\$ 9,323,648	\$ 8,243,822

Pension Plan Fiduciary Net Position. Detailed information about the HIS Plan's fiduciary net position is available in the separately issued FRS Pension Plan and Other State Administered Systems Comprehensive Annual Financial Report.

## 2. FRS – Defined Contribution Pension Plan

The SBA administers the defined contribution plan officially titled the FRS Investment Plan (Investment Plan). The Investment Plan is reported in the SBA's annual financial statements and in the State's Comprehensive Annual Financial Report.

As provided in Section 121.4501, Florida Statutes, eligible FRS members may elect to participate in the Investment Plan in lieu of the FRS defined benefit plan. District employees participating in DROP are not eligible to participate in the Investment Plan. Employer and employee contributions, including amounts contributed to individual member's accounts, are defined by law, but the ultimate benefit depends in part on the performance of investment funds. Retirement benefits are based upon the value of the member's account upon retirement. Benefit terms, including contribution requirements, for the Investment Plan are established and may be amended by the Florida Legislature. The Investment Plan is funded with the same employer and employee contribution rates that are based on salary and membership class (Regular, Elected County Officers, etc.), as the FRS defined benefit plan. Contributions are directed to individual member accounts and the individual members allocate contributions and account balances among various

approved investment choices. Costs of administering the Investment Plan, including the FRS Financial Guidance Program, are funded through an employer contribution of 0.06 percent of payroll and by forfeited benefits of Investment Plan members. Allocations to the Investment Plan member accounts during the 2018-19 fiscal year were as follows:

<u>Class</u>	<u>Percent of Gross Compensation</u>
FRS, Regular	6.30
FRS, Elected County Officers	11.34

For all membership classes, employees are immediately vested in their own contributions and are vested after 1 year of service for employer contributions and investment earnings, regardless of membership class. If an accumulated benefit obligation for service credit originally earned under the FRS Pension Plan is transferred to the Investment Plan, the member must have the years of service required for FRS Pension Plan vesting (including the service credit represented by the transferred funds) to be vested for these funds and the earnings on the funds. Nonvested employer contributions are placed in a suspense account for up to 5 years. If the employee returns to FRS-covered employment within the 5-year period, the employee will regain control over their account. If the employee does not return within the 5-year period, the employee will forfeit the accumulated account balance. For the fiscal year ended June 30, 2019, the information for the amount of forfeitures was unavailable from the SBA; however, management believes that these amounts, if any, would be immaterial to the District.

After termination and applying to receive benefits, the member may rollover vested funds to another qualified plan, structure a periodic payment under the Investment Plan, receive a lump-sum distribution, leave the funds invested for future distribution, or any combination of these options. Disability coverage is provided in which the member may either transfer the account balance to the FRS Pension Plan when approved for disability retirement to receive guaranteed lifetime monthly benefits under the FRS Pension Plan or remain in the Investment Plan and rely upon that account balance for retirement income.

The District's Investment Plan pension expense totaled \$235,181 for the fiscal year ended June 30, 2019.

**F. Other Postemployment Benefit Obligations**

*Plan Description.* The Other Postemployment Benefits Plan (OPEB Plan) is a single-employer defined benefit plan administered by the District that provides OPEB for all employees who satisfy the District's retirement eligibility provisions. Pursuant to Section 112.0801, Florida Statutes, former employees who retire from the District are eligible to participate in the District's health and hospitalization plan for medical and prescription drug coverage. Retirees and their eligible dependents shall be offered the same health and hospitalization insurance coverage as is offered to active employees at a premium cost of no more than the premium cost applicable to active employees. The District subsidizes the premium rates paid by retirees by allowing them to participate in the OPEB Plan at reduced or blended group (implicitly subsidized) premium rates for both active and retired employees. These rates provide an implicit subsidy for retirees because retiree healthcare

costs are generally greater than active employee healthcare costs. The OPEB Plan contribution requirements and benefit terms of the District and the OPEB Plan members are established and may be amended through action from the Board. No assets are accumulated in a trust that meet the criteria in paragraph 4 of GASB Statement No. 75.

Benefits Provided. The OPEB Plan provides healthcare insurance benefits for retirees and their dependents. In addition to the implicit subsidy described above, pursuant to Section 112.0801, Florida Statutes, the District contributes \$30 per month toward single health insurance coverage for former employees who retired prior to May 2, 2001. The benefits provided under this defined plan are provided for a fixed number of years determined at the time of retirement based on the number of years worked for the District and may be amended by Board action.

Employees Covered by Benefit Terms. At June 30, 2018, the following employees were covered by the benefit terms:

Inactive Employees or Beneficiaries Currently Receiving Benefits	135
Active Employees	<u>637</u>
Total	<u>772</u>

Total OPEB Liability. The District's total OPEB liability of \$3,153,130 was measured as of June 30, 2018, and was determined by an actuarial valuation as of June 30, 2018.

Actuarial Assumptions and Other Inputs. The total OPEB liability was determined using the following actuarial assumptions and other inputs, applied to all periods included in the measurement, unless otherwise specified:

Inflation	2.5 percent
Discount Rate	3.62 percent
Salary Increases	3.7 percent – 7.8 percent, including inflation.
Healthcare Cost Trend Rates	Based on the Getzen Model, with trend starting at 5.51 percent for 2018 (to reflect actual premium increases), followed by 6.75 percent for 2019, 6.5 percent for 2020, and then gradually decreasing to an ultimate rate of 4.24 percent plus 0.52 percent increase for excise tax.
Aging Factors	Based on the 2013 SOA Study "Health Care Costs – From Birth to Death."
Expenses	Administrative expenses are included in the per capita health costs.

For plans that do not have formal assets, the discount rate should equal the tax-exempt municipal bond rate based on an index of 20-year general obligation bonds with an average AA credit rating as of the measurement date. For the purpose of the OPEB Plan actuarial valuation, the municipal bond rate of 3.62 percent was based on the daily rate closest to but not later than the measurement date of Fidelity's "20-Year Municipal GO AA Index".

Demographic assumptions employed in the actuarial valuation were the same as those employed in the July 1, 2018, actuarial valuation of the FRS Defined Benefit Pension Plan. These demographic assumptions were developed by FRS from an actuarial experience study, and therefore are

appropriate for use in the OPEB Plan actuarial valuation. These include assumed rates of future termination, mortality, disability, and retirement. In addition, salary increase assumptions (for development of the pattern of the normal cost increases) were the same as those used in the July 1, 2018, actuarial valuation of the FRS Defined Benefit Pension Plan. Assumptions used in valuation of benefits for participants of the FRS Investment Plan are the same as for similarly situated participants of the FRS Defined Benefit Pension Plan.

Changes in the Total OPEB Liability.

	<u>Amount</u>
Balance at June 30, 2018	<u>\$ 4,314,527</u>
Changes for the year:	
Service Cost	116,577
Interest	151,099
Differences Between Expected and Actual Experience	(386,656)
Changes of Assumptions or Other Inputs	(668,894)
Benefit Payments	<u>(373,523)</u>
Net Changes	<u>(1,161,397)</u>
Balance at June 30, 2019	<u>\$ 3,153,130</u>

The changes of assumptions or other inputs are based on the following:

- The discount rate was changed from 3.56 percent in 2017 to 3.62 percent in 2018.
- The medical claims costs and premiums were updated based on information provided for the valuation.
- The health coverage acceptance assumption was lowered from 50 percent (45 percent single coverage and 5 percent dual coverage) to 40 percent (35 percent single coverage and 5 percent dual coverage) based on recent experience.

Sensitivity of the Total OPEB Liability to Changes in the Discount Rate. The following table presents the total OPEB liability of the District, as well as what the District's total OPEB liability would be if it were calculated using a discount rate that is 1 percentage point lower (2.62 percent) or 1 percentage point higher (4.62 percent) than the current rate:

	<u>1%</u> <u>Decrease</u> <u>(2.62%)</u>	<u>Current</u> <u>Discount Rate</u> <u>(3.62%)</u>	<u>1%</u> <u>Increase</u> <u>(4.62%)</u>
Total OPEB Liability	\$ 3,355,627	\$ 3,153,130	\$ 2,962,481

Sensitivity of the Total OPEB Liability to Changes in the Healthcare Cost Trend Rates. The following table presents the total OPEB liability of the District, as well as what the District's total OPEB liability would be if it were calculated using healthcare cost trend rates that are 1 percentage point lower (4.51 percent decreasing to 3.76 percent) or 1 percentage point higher (6.51 percent decreasing to 5.76 percent) than the current healthcare cost trend rates:



	1% Decrease (4.51% decreasing to 3.76%)	Healthcare Cost Trend Rates (5.51% decreasing to 4.76%)	1% Increase (6.51% decreasing to 5.76%)
Total OPEB Liability	\$ 2,887,323	\$ 3,153,130	\$ 3,462,669

OPEB Expense and Deferred Outflows of Resources and Deferred Inflows of Resources Related to OPEB. For the fiscal year ended June 30, 2019, the District recognized OPEB expense of \$125,145. At June 30, 2019, the District reported deferred outflows of resources and deferred inflows of resources related to OPEB from the following sources:

<u>Description</u>	<u>Deferred Outflows of Resources</u>	<u>Deferred Inflows of Resources</u>
Differences Between Expected and Actual Experience	\$ -	\$ 341,696
Changes of Assumptions or Other Inputs	-	723,728
Benefits Paid Subsequent to the Measurement Date	269,992	-
<b>Total</b>	<b>\$ 269,992</b>	<b>\$ 1,065,424</b>

The amount reported as deferred outflows of resources related to OPEB, totaling \$269,992, resulting from benefits paid subsequent to the measurement date and before the end of the fiscal year will be included as a reduction of the total OPEB liability in the year ended June 30, 2020. Other amounts reported as deferred inflows of resources related to OPEB will be recognized in OPEB expense as follows:

<u>Fiscal Year Ending June 30</u>	<u>Amount</u>
2020	\$ (142,531)
2021	(142,531)
2022	(142,531)
2023	(142,531)
2024	(142,531)
Thereafter	(352,769)
<b>Total</b>	<b>\$ (1,065,424)</b>

## G. Risk Management Programs

The District is exposed to various risks of loss related to torts; theft of, damage to, and destruction of assets; errors and omissions; injuries to employees; and natural disasters. Workers' compensation, automobile liability, general liability, building and contents, boiler and machinery, errors and omissions, and employee health and hospitalization, life and dental coverage are being provided through purchased commercial insurance with minimum deductibles for each line of coverage.

Settled claims resulting from the risks described above have not exceeded commercial insurance coverage in any of the past 3 fiscal years.

## H. Changes in Short-Term Debt

The following is a schedule of changes in short-term debt:

	<u>Beginning Balance</u>	<u>Additions</u>	<u>Deductions</u>	<u>Ending Balance</u>
GOVERNMENTAL ACTIVITIES				
Tax Anticipation Note	\$ 0.00	\$ 4,000,000.00	\$ 83.33	\$ 3,999,916.67

Proceeds from the tax anticipation note were used as working capital reserves in the General Fund as permitted under State and Federal tax laws.

## I. Long-Term Liabilities

### 1. Bonds Payable

Bonds payable at June 30, 2019, are as follows:

<u>Bond Type</u>	<u>Amount Outstanding</u>	<u>Interest Rates (Percent)</u>	<u>Annual Maturity To</u>
State School Bonds:			
Series 2014B, Refunding	\$ 24,000.00	2	2020
Sales Tax Revenue Bonds:			
Series 2013	1,632,251.08	3.28	2029
<b>Total Bonds Payable</b>	<u>\$ 1,656,251.08</u>		

The various bonds were issued to finance capital outlay projects of the District. The following is a description of the bonded debt issues:

#### **State School Bonds**

These bonds are issued by the SBE on behalf of the District. The bonds mature serially and are secured by a pledge of the District's portion of the State-assessed motor vehicle license tax. The State's full faith and credit is also pledged as security for these bonds. Principal and interest payments, investment of debt service fund resources, and compliance with reserve requirements are administered by the SBE and the SBA.

#### **Sales Tax Revenue Bonds, Series 2013 (Pari-Mutuel Revenue Replacement Program)**

These bonds are authorized by Chapters 57-665 and 70-693, Laws of Florida, and Section 212.20, Florida Statutes, and a resolution adopted by the Gadsden County District School Board on October 22, 2013. These bonds are secured by pari-mutuel replacement revenues distributed annually to Gadsden County from the State pursuant to Section 212.20(6)(d)6.a., Florida Statutes, as a replacement for moneys distributed under Section 550.135, Florida Statutes, prior to July 1, 2000.

The District has pledged a total of \$1,912,982.90 of sales tax revenues in connection with the District Sales Tax Bonds, Series 2013, described above. During the 2018-19 fiscal year,

the District recognized sales tax revenues totaling \$223,250 and expended \$201,366.62 (90.2 percent) of these revenues for debt service directly collateralized by these revenues. The pledged sales tax revenues are committed until final maturity of the debt on July 1, 2028. Approximately 85.7 percent of this revenue stream has been pledged in connection with debt service on the revenue bonds.

Annual requirements to amortize all bonded debt outstanding as of June 30, 2019, are as follows:

<u>Fiscal Year Ending June 30</u>	<u>Total</u>	<u>Principal</u>	<u>Interest</u>
State School Bonds:			
2020	\$ 24,480.00	\$ 24,000.00	\$ 480.00
Sales Tax Revenue Bonds			
2020	201,366.62	149,040.98	52,325.64
2021	201,366.63	153,969.62	47,397.01
2022	201,366.62	159,061.23	42,305.39
2023	201,366.62	164,321.22	37,045.40
2024	201,366.62	169,755.15	31,611.47
2025-2029	906,149.79	836,102.88	70,046.91
Total Sales Tax Revenue Bonds	1,912,982.90	1,632,251.08	280,731.82
<b>Total</b>	<b>\$ 1,937,462.90</b>	<b>\$ 1,656,251.08</b>	<b>\$ 281,211.82</b>

## 2. Changes in Long-Term Liabilities

The following is a summary of changes in long-term liabilities:

<u>Description</u>	<u>Beginning Balance</u>	<u>Additions</u>	<u>Deductions</u>	<u>Ending Balance</u>	<u>Due In One Year</u>
<b>GOVERNMENTAL ACTIVITIES</b>					
Note Payable	\$ 183,331.85	\$ -	\$ 183,331.85	\$ -	\$ -
Bonds Payable	1,843,521.20	-	187,270.12	1,656,251.08	173,040.98
Compensated Absences Payable	2,349,496.45	514,259.55	382,748.56	2,481,007.44	446,917.28
Other Postemployment Benefits Payable	4,314,527.00	267,676.00	1,429,073.00	3,153,130.00	269,992.00
Net Pension Liability	30,620,089.00	16,781,120.00	17,867,939.00	29,533,270.00	228,215.00
<b>Total Governmental Activities</b>	<b>\$39,310,965.50</b>	<b>\$17,563,055.55</b>	<b>\$20,050,362.53</b>	<b>\$36,823,658.52</b>	<b>\$1,118,165.26</b>

For the governmental activities, compensated absences, pensions, and other postemployment benefits are generally liquidated with resources of the General Fund.

## J. Fund Balance Reporting

In addition to committed and assigned fund balance categories discussed in Note I.F.10., fund balances may be classified as follows:

- **Nonspendable Fund Balance.** Nonspendable fund balance is the net current financial resources that cannot be spent because they are either not in spendable form or are legally or contractually required to be maintained intact. Generally, not in spendable form means that an item is not expected to be converted to cash.

- **Restricted Fund Balance.** Restricted fund balance is the portion of fund balance on which constraints have been placed by creditors, grantors, contributors, laws or regulations of other governments, constitutional provisions, or enabling legislation. Restricted fund balance places the most binding level of constraint on the use of fund balance.
- **Unassigned Fund Balance.** The unassigned fund balance is the portion of fund balance that is the residual classification for the General Fund. This balance represents amounts that have not been assigned to other funds and that have not been restricted, committed, or assigned for specific purposes.

## K. Interfund Receivables and Payables

The following is a summary of interfund receivables and payables reported in the fund financial statements:

<u>Funds</u>	<u>Interfund</u>	
	<u>Receivables</u>	<u>Payables</u>
Major:		
General	\$ 1,208,162.84	\$ -
Special Revenue:		
Other	-	1,049,711.84
Nonmajor Governmental	-	158,451.00
<b>Total</b>	<b>\$ 1,208,162.84</b>	<b>\$ 1,208,162.84</b>

The interfund balances represent temporary borrowing of cash to cover projects that are awaiting reimbursement from other agencies. All balances are expected to be repaid within 1 year.

## L. Revenues

### 1. Schedule of State Revenue Sources

The following is a schedule of the District's State revenue sources for the 2018-19 fiscal year:

<u>Source</u>	<u>Amount</u>
Florida Education Finance Program	\$ 22,895,639.00
Categorical Educational Program - Class Size Reduction	5,154,944.00
Voluntary Prekindergarten Program	551,941.31
School of Hope	519,000.00
Workforce Development Program	350,615.00
School Recognition	302,718.00
Charter School Capital Outlay	293,099.00
Motor Vehicle License Tax (Capital Outlay and Debt Service)	292,543.23
Florida Best and Brightest Teacher Scholarships	268,750.00
Gross Receipts Tax (Public Education Capital Outlay)	158,451.00
Food Service Supplement	69,713.00
Miscellaneous	804,598.75
<b>Total</b>	<b>\$ 31,662,012.29</b>

Accounting policies relating to certain State revenue sources are described in Note I.G.2.

## 2. Property Taxes

The following is a summary of millages and taxes levied on the 2018 tax roll for the 2018-19 fiscal year:

	<u>Millages</u>	<u>Taxes Levied</u>
<b><u>General Fund</u></b>		
Nonvoted School Tax:		
Required Local Effort	4.222	\$ 6,659,920.78
Basic Discretionary Local Effort	0.748	1,179,919.65
<b><u>Capital Projects - Local Capital Improvement Fund</u></b>		
Nonvoted Tax:		
Local Capital Improvements	1.500	2,366,149.02
<b>Total</b>	<u>6.470</u>	<u>\$10,205,989.45</u>

## M. Interfund Transfers

The following is a summary of interfund transfers reported in the fund financial statements:

<u>Funds</u>	<u>Interfund</u>	
	<u>Transfers In</u>	<u>Transfers Out</u>
Major:		
General	\$ 2,393,393.25	\$ 213,662.25
Nonmajor Governmental	401,404.74	2,581,135.74
<b>Total</b>	<u>\$ 2,794,797.99</u>	<u>\$ 2,794,797.99</u>

The transfers to the General Fund were for maintenance and property casualty insurance premiums and for charter school capital outlay paid from the General Fund and reimbursed from the nonmajor capital projects funds. The transfers to the nonmajor governmental funds were to pay the current year debt service payment on the note issued for the Havana Magnet School (formerly known as the Havana Middle School Addition project) and the sales tax revenue bonds payable.

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## OTHER REQUIRED SUPPLEMENTARY INFORMATION

### Budgetary Comparison Schedule General and Major Special Revenue Funds For the Fiscal Year Ended June 30, 2019

	General Fund			Variance with Final Budget - Positive (Negative)
	Original Budget	Final Budget	Actual	
<b>Revenues</b>				
Intergovernmental:				
Federal Direct	\$ 50,000.00	\$ 46,638.88	\$ 46,638.88	\$ -
Federal Through State and Local	287,789.56	3,118,956.94	3,118,956.94	-
State	31,010,691.77	30,848,206.06	30,848,206.06	-
Local:				
Property Taxes	7,535,570.00	7,598,089.99	7,598,089.99	-
Miscellaneous	702,825.00	822,401.36	822,401.36	-
Total Local Revenues	<u>8,238,395.00</u>	<u>8,420,491.35</u>	<u>8,420,491.35</u>	-
<b>Total Revenues</b>	<u>39,586,876.33</u>	<u>42,434,293.23</u>	<u>42,434,293.23</u>	-
<b>Expenditures</b>				
Current - Education:				
Instruction	20,861,902.68	23,338,575.07	23,338,575.07	-
Student Support Services	1,976,162.31	1,702,333.03	1,702,333.03	-
Instructional Media Services	619,257.04	479,202.72	479,202.72	-
Instruction and Curriculum Development Services	1,069,179.61	1,134,024.91	1,134,024.91	-
Instructional Staff Training Services	469,931.44	231,532.89	231,532.89	-
Instruction-Related Technology	233,201.32	53,186.66	53,186.66	-
Board	381,290.85	417,642.02	417,642.02	-
General Administration	660,468.48	496,883.38	496,883.38	-
School Administration	3,399,877.89	3,163,982.55	3,163,982.55	-
Facilities Acquisition and Construction	138,279.95	91,907.41	91,907.41	-
Fiscal Services	726,980.64	662,780.10	662,780.10	-
Food Services	12,600.00	313,093.91	313,093.91	-
Central Services	317,031.58	325,003.77	325,003.77	-
Student Transportation Services	3,666,402.68	3,807,900.77	3,807,900.77	-
Operation of Plant	4,140,022.77	5,862,375.48	5,862,375.48	-
Maintenance of Plant	1,302,742.60	4,337,242.93	4,337,242.93	-
Administrative Technology Services	889,530.58	1,071,615.46	1,071,615.46	-
Community Services	14,759.00	-	-	-
Fixed Capital Outlay:				
Other Capital Outlay	-	411,929.81	411,929.81	-
<b>Total Expenditures</b>	<u>40,879,621.42</u>	<u>47,901,212.87</u>	<u>47,901,212.87</u>	-
<b>Deficiency of Revenues Over Expenditures</b>	<u>(1,292,745.09)</u>	<u>(5,466,919.64)</u>	<u>(5,466,919.64)</u>	-
<b>Other Financing Sources (Uses)</b>				
Transfers In	1,500,000.00	2,393,393.25	2,393,393.25	-
Sale of Capital Assets	5,000.00	5,000.00	5,000.00	-
Loss Recoveries	-	5,380,986.10	5,380,986.10	-
Transfers Out	(201,366.62)	(213,662.25)	(213,662.25)	-
<b>Total Other Financing Sources</b>	<u>1,303,633.38</u>	<u>7,565,717.10</u>	<u>7,565,717.10</u>	-
<b>Net Change in Fund Balances</b>	10,888.29	2,098,797.46	2,098,797.46	-
Fund Balances, Beginning	1,176,718.00	2,682,621.73	2,682,621.73	-
<b>Fund Balances, Ending</b>	<u>\$ 1,187,606.29</u>	<u>\$ 4,781,419.19</u>	<u>\$ 4,781,419.19</u>	<u>\$ 0.00</u>

**Special Revenue - Other Fund**

<b>Original Budget</b>	<b>Final Budget</b>	<b>Actual</b>	<b>Variance with Final Budget - Positive (Negative)</b>
\$ 2,000,498.00	\$ 2,200,263.30	\$ 2,200,263.30	\$ -
6,324,677.36	9,446,069.48	9,446,069.48	-
-	-	-	-
-	-	-	-
-	-	-	-
<u>8,325,175.36</u>	<u>11,646,332.78</u>	<u>11,646,332.78</u>	<u>-</u>
4,535,269.01	6,409,724.22	6,409,724.22	-
1,031,488.13	1,237,976.79	1,237,976.79	-
-	-	-	-
868,813.00	1,192,295.20	1,192,295.20	-
1,051,020.00	1,419,842.92	1,419,842.92	-
259,932.00	96,746.00	96,746.00	-
-	-	-	-
18,106.22	356,477.39	356,477.39	-
26,662.00	36,442.76	36,442.76	-
-	-	-	-
-	-	-	-
-	1,331.01	1,331.01	-
107,802.00	57,317.48	57,317.48	-
323,330.00	421,893.67	421,893.67	-
75,229.00	85,939.00	85,939.00	-
-	-	-	-
5,900.00	558.09	558.09	-
21,624.00	-	-	-
-	329,788.25	329,788.25	-
<u>8,325,175.36</u>	<u>11,646,332.78</u>	<u>11,646,332.78</u>	<u>-</u>
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
-	-	-	-
<u>\$ 0.00</u>	<u>\$ 0.00</u>	<u>\$ 0.00</u>	<u>\$ 0.00</u>



**Schedule of Changes in the District's  
Total OPEB Liability and Related Ratios**

	<u>2019</u>	<u>2018</u>
<b>Total OPEB Liability</b>		
Service Cost	\$ 116,577	\$ 126,381
Interest	151,099	132,339
Difference Between Expected and Actual Experience	(386,656)	-
Changes of Assumptions or Other Inputs	(668,894)	(172,198)
Benefit Payments	<u>(373,523)</u>	<u>(355,575)</u>
<b>Net Change in Total OPEB Liability</b>	(1,161,397)	(269,053)
Total OPEB Liability - Beginning	<u>4,314,527</u>	<u>4,583,580</u>
<b>Total OPEB Liability - Ending</b>	<u>\$ 3,153,130</u>	<u>\$ 4,314,527</u>
Covered-Employee Payroll	\$ 22,617,679	\$ 23,752,855
<b>Total OPEB Liability as a Percentage of Covered-Employee Payroll</b>	13.94%	18.16%

**Schedule of the District's Proportionate Share  
of the Net Pension Liability –  
Florida Retirement System Pension Plan (1)**

	<u>2018</u>	<u>2017</u>	<u>2016</u>	<u>2015</u>	<u>2014</u>	<u>2013</u>
District's Proportion of the FRS Net Pension Liability	0.067095864%	0.069450826%	0.068199373%	0.076705428%	0.081729998%	0.086175321%
District's Proportionate Share of the FRS Net Pension Liability	\$ 20,209,622	\$ 20,543,088	\$ 17,220,397	\$ 9,907,535	\$ 4,986,732	\$ 14,834,608
District's Covered Payroll	\$ 28,887,377	\$ 30,088,901	\$ 28,331,182	\$ 29,143,950	\$ 30,277,610	\$ 31,821,650
District's Proportionate Share of the FRS Net Pension Liability as a Percentage of Its Covered Payroll	69.96%	68.27%	60.78%	34.00%	16.47%	46.62%
FRS Plan Fiduciary Net Position as a Percentage of the Total Pension Liability	84.26%	83.89%	84.88%	92.00%	96.09%	88.54%

(1) The amounts presented for each fiscal year were determined as of June 30.

**Schedule of District Contributions –  
Florida Retirement System Pension Plan (1)**

	<u>2019</u>	<u>2018</u>	<u>2017</u>	<u>2016</u>	<u>2015</u>	<u>2014</u>
Contractually Required FRS Contribution	\$ 1,990,263	\$ 1,912,178	\$ 1,807,976	\$ 1,663,150	\$ 1,870,143	\$ 1,790,234
FRS Contributions in Relation to the Contractually Required Contribution	<u>(1,990,263)</u>	<u>(1,912,178)</u>	<u>(1,807,976)</u>	<u>(1,663,150)</u>	<u>(1,870,143)</u>	<u>(1,790,234)</u>
FRS Contribution Deficiency (Excess)	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>
District's Covered Payroll	\$ 28,591,014	\$ 28,887,377	\$ 30,088,901	\$ 28,331,182	\$ 29,143,950	\$ 30,277,610
FRS Contributions as a Percentage of Covered Payroll	6.96%	6.62%	6.01%	5.87%	6.42%	5.91%

(1) The amounts presented for each fiscal year were determined as of June 30.

**Schedule of the District's Proportionate Share  
of the Net Pension Liability –  
Health Insurance Subsidy Pension Plan (1)**

	2018	2017	2016	2015	2014	2013
District's Proportion of the HIS Net Pension Liability	0.088090966%	0.094243971%	0.091667405%	0.096010715%	0.101781025%	0.109538012%
District's Proportionate Share of the HIS Net Pension Liability	\$ 9,323,648	\$ 10,077,001	\$ 10,683,456	\$ 9,791,583	\$ 9,516,774	\$ 9,536,724
District's Covered Payroll	\$ 28,887,377	\$ 30,088,901	\$ 28,331,182	\$ 29,143,950	\$ 30,277,610	\$ 31,821,650
District's Proportionate Share of the HIS Net Pension Liability as a Percentage of its Covered Payroll	32.28%	33.49%	37.71%	33.60%	31.43%	29.97%
HIS Plan Fiduciary Net Position as a Percentage of the Total Pension Liability	2.15%	1.64%	0.97%	0.50%	0.99%	1.78%

(1) The amounts presented for each fiscal year were determined as of June 30.

**Schedule of District Contributions –  
Health Insurance Subsidy Pension Plan (1)**

	2019	2018	2017	2016	2015	2014
Contractually Required HIS Contribution	\$ 474,309	\$ 477,720	\$ 498,766	\$ 469,854	\$ 367,013	\$ 348,668
HIS Contributions in Relation to the Contractually Required Contribution	(474,309)	(477,720)	(498,766)	(469,854)	(367,013)	(348,668)
HIS Contribution Deficiency (Excess)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
District's Covered Payroll	\$ 28,591,014	\$ 28,887,377	\$ 30,088,901	\$ 28,331,182	\$ 29,143,950	\$ 30,277,610
HIS Contributions as a Percentage of Covered Payroll	1.66%	1.65%	1.66%	1.66%	1.26%	1.15%

(1) The amounts presented for each fiscal year were determined as of June 30.

**NOTES TO REQUIRED SUPPLEMENTARY INFORMATION**

**1. Budgetary Basis of Accounting**

The Board follows procedures established by State law and State Board of Education (SBE) rules in establishing budget balances for governmental funds, as described below:

- Budgets are prepared, public hearings are held, and original budgets are adopted annually for all governmental fund types in accordance with procedures and time intervals prescribed by State law and SBE rules.
- Appropriations are controlled at the object level (e.g., salaries, purchased services, and capital outlay) within each activity (e.g., instruction, student transportation services, and school administration) and may be amended by resolution at any Board meeting prior to the due date for the annual financial report.
- Budgets are prepared using the same modified accrual basis as is used to account for governmental funds.
- Budgetary information is integrated into the accounting system and, to facilitate budget control, budget balances are encumbered when purchase orders are issued. Appropriations lapse at fiscal year end and encumbrances outstanding are honored from the subsequent year's appropriations.

## **2. Schedule of Changes in the District's Total Other Postemployment Benefits Liability and Related Ratios**

No assets are accumulated in a trust that meet the criteria in paragraph 4 of GASB Statement No. 75 to pay related benefits. The June 30, 2019 total OPEB liability decreased from the prior fiscal year as a result of changes in assumptions and other inputs as discussed below:

- The discount rate was changed from 3.56 percent to 3.62 percent. This change decreased the liability.
- The medical claims costs and premiums were updated based on actual claims experience and premium information provided for the valuation. This change decreased the liability.
- The health coverage acceptance assumption was decreased from 50 percent (45 percent single coverage and 5 percent dual coverage) to 40 percent (35 percent single coverage and 5 percent dual coverage) based on recent experience. This change decreased the liability.

## **3. Schedule of Net Pension Liability and Schedule of Contributions – Florida Retirement System Pension Plan**

*Changes of Assumptions.* The long-term expected rate of return was decreased from 7.1 percent to 7 percent, and the active member mortality assumption was updated.

## **4. Schedule of Net Pension Liability and Schedule of Contributions – Health Insurance Subsidy Pension Plan**

*Changes of Assumptions.* The municipal bond rate used to determine total pension liability was increased from 3.58 percent to 3.87 percent.

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# SCHEDULE OF EXPENDITURES OF FEDERAL AWARDS

## Gadsden County District School Board Schedule of Expenditures of Federal Awards For the Fiscal Year Ended June 30, 2019

Federal Grantor/Pass-Through Grantor/ Program or Cluster	Federal CFDA Number	Pass - Through Entity Identifying Number	Passed Through to Subrecipients	Total Expenditures
<b>Clustered</b>				
<b>Child Nutrition Cluster:</b>				
United States Department of Agriculture:				
Florida Department of Agriculture and Consumer Services:				
School Breakfast Program	10.553	19002	\$ -	\$ 1,189,673.08
National School Lunch Program	10.555	19001, 19003	-	2,808,219.87
Summer Food Service Program for Children	10.559	18006, 18007, 19006, 19007	-	229,330.14
<b>Total Child Nutrition Cluster</b>			-	4,227,223.09
<b>Student Financial Assistance Cluster</b>				
United States Department of Education:				
Federal Pell Grant Program	84.063	N/A	-	67,190.00
<b>Special Education Cluster:</b>				
United States Department of Education:				
Special Education - Grants to States:	84.027			
Florida Department of Education		263	-	1,414,317.78
Florida Gulf Coast University		None	-	22,288.00
Leon County District School Board		None	-	32,453.80
<b>Total Special Education - Grants to States</b>	84.027		-	1,469,059.58
Special Education - Preschool Grants:				
Florida Department of Education	84.173	267	-	110,397.30
<b>Total Special Education Cluster</b>			-	1,579,456.88
<b>TRIO Cluster:</b>				
United States Department of Education:				
Florida State University:				
TRIO - Upward Bound	84.047	None	-	7,561.50
<b>TANF Cluster:</b>				
United State Department of Health and Human Services:				
University of South Florida:				
Temporary Assistance for Needy Families	93.558	None	-	174,284.45
<b>Not Clustered</b>				
<b>United States Department of Agriculture:</b>				
Florida Department of Agriculture and Consumer Services:				
Fresh Fruit and Vegetable Program	10.582	19004	-	127,358.01
<b>United States Department of Defense:</b>				
Army Junior Reserve Officers Training Corps	12.UNK	N/A	-	46,638.88
<b>United States Department of Education:</b>				
Florida Department of Education:				
Title I Grants to Local Educational Agencies	84.010	212, 226	201,476.70	4,900,275.56
Career and Technical Education - Basic Grants to States	84.048	161	-	193,883.79
Education for Homeless Children and Youth	84.196	127	-	27,567.67
Twenty-First Century Community Learning Centers	84.287	244	-	1,992,409.69
Rural Education	84.358	110	-	63,525.49
English Language Acquisition State Grants	84.365	102	-	149,927.02
Supporting Effective Instruction State Grants	84.367	224	-	248,588.92
Student Support and Academic Enrichment Program	84.424	241	-	170,891.81
<b>Total United States Department of Education</b>			201,476.70	7,747,069.95
<b>United States Department of Health and Human Services:</b>				
Head Start	93.600	N/A	-	2,133,073.30
<b>Total Expenditures of Federal Awards</b>			\$ 201,476.70	\$ 16,109,856.06

The accompanying notes are an integral part of this Schedule.

Report No. 2020-138  
March 2020

- Notes: (1) Basis of Presentation. The accompanying Schedule of Expenditures of Federal Awards (Schedule) includes the Federal award activity of the Gadsden County District School Board under programs of the Federal Government for the fiscal year ended June 30, 2019. The information in this Schedule is presented in accordance with the requirements of Title 2 U.S. Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Because the Schedule presents only a selected portion of the operations of the District, it is not intended to and does not present the financial position or changes in net position of the District.
- (2) Summary of Significant Accounting Policies. Expenditures reported on the Schedule are reported on the modified accrual basis of accounting. Such expenditures are recognized following the cost principles contained in the Uniform Guidance, wherein certain types of expenditures are not allowable or are limited as to reimbursement.
- (3) Indirect Cost Rate. The District has not elected to use the 10 percent de minimis cost rate allowed under the Uniform Guidance.
- (4) Noncash Assistance – National School Lunch Program. Includes \$72,068.80 of donated food received during the fiscal year. Donated foods are valued at fair value as determined at the time of donation.
- (5) Head Start. Expenditures include \$860,958.30 for grant number/program year 04CH4687/05 and \$1,272,115.00 for grant number/program year 04CH4687/06.



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Auditor General

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The President of the Senate, the Speaker of the  
House of Representatives, and the  
Legislative Auditing Committee

## **INDEPENDENT AUDITOR'S REPORT ON INTERNAL CONTROL OVER FINANCIAL REPORTING AND ON COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE WITH *GOVERNMENT AUDITING STANDARDS***

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of the governmental activities, the discretely presented component unit, each major fund, and the aggregate remaining fund information of the Gadsden County District School Board as of and for the fiscal year ended June 30, 2019, and the related notes to the financial statements, which collectively comprise the District's basic financial statements, and have issued our report thereon dated February 28, 2020, included under the heading **INDEPENDENT AUDITOR'S REPORT**. Our report includes a reference to other auditors who audited the financial statements of the school internal funds and the discretely presented component unit, as described in our report on the District's financial statements. For the discretely presented component unit, this report does not include the results of the other auditors' testing of internal control over financial reporting or compliance and other matters that are reported on separately by those auditors. The financial statement of the school internal funds was not audited in accordance with *Government Auditing Standards*.

### **Internal Control Over Financial Reporting**

In planning and performing our audit of the financial statements, we considered the District's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinions on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the District's internal control. Accordingly, we do not express an opinion on the effectiveness of the District's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or

detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control such that there is a reasonable possibility that a material misstatement of the District's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies and therefore, material weaknesses or significant deficiencies may exist that have not been identified. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. We did identify certain deficiencies in internal control, described in the accompanying **SCHEDULE OF FINDINGS AND QUESTIONED COSTS** as Financial Statement Finding Nos. 2019-001 and 2019-002 that we consider to be significant deficiencies.

### **Compliance and Other Matters**

As part of obtaining reasonable assurance about whether the District's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, rules, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit and, accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

### **District's Responses to Findings**

The District's responses to the findings identified in our audit are described in the accompanying **SCHEDULE OF FINDINGS AND QUESTIONED COSTS** Financial Statement Finding Nos. 2019-001 and 2019-002. The District is also responsible for preparing a corrective action plan to address these findings. The District's responses and the **CORRECTIVE ACTION PLAN** were not subjected to the auditing procedures applied in the audit of the financial statements and, accordingly, we express no opinion on them.



## Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the District's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the District's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Respectfully submitted,

A handwritten signature in blue ink that reads "Sherrill F. Norman". The signature is written in a cursive style with a large initial "S" and a distinct "F".

Sherrill F. Norman, CPA  
Tallahassee, Florida  
February 28, 2020



Sherrill F. Norman, CPA  
Auditor General

# AUDITOR GENERAL STATE OF FLORIDA

Claude Denson Pepper Building, Suite G74  
111 West Madison Street  
Tallahassee, Florida 32399-1450



Phone: (850) 412-2722  
Fax: (850) 488-6975

The President of the Senate, the Speaker of the  
House of Representatives, and the  
Legislative Auditing Committee

## INDEPENDENT AUDITOR'S REPORT ON COMPLIANCE FOR EACH MAJOR FEDERAL PROGRAM AND REPORT ON INTERNAL CONTROL OVER COMPLIANCE REQUIRED BY THE UNIFORM GUIDANCE

### Report on Compliance for Each Major Federal Program

We have audited the Gadsden County District School Board's compliance with the types of compliance requirements described in the *OMB Compliance Supplement* that could have a direct and material effect on each of the District's major Federal programs for the fiscal year ended June 30, 2019. The District's major Federal programs are identified in **SECTION I – SUMMARY OF AUDITOR'S RESULTS** of the accompanying **SCHEDULE OF FINDINGS AND QUESTIONED COSTS**.

### *Management's Responsibility*

Management is responsible for compliance with Federal statutes, regulations, and the terms and conditions of its Federal awards applicable to its Federal programs.

### *Auditor's Responsibility*

Our responsibility is to express an opinion on compliance for each of the District's major Federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. *Code of Federal Regulations* Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Those standards and the Uniform Guidance require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major Federal program occurred. An audit includes examining, on a test basis, evidence about the District's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major Federal program. However, our audit does not provide a legal determination of the District's compliance.

### ***Opinion on Each Major Federal Program***

In our opinion, the District complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major Federal programs for the fiscal year ended June 30, 2019.

### **Report on Internal Control Over Compliance**

District management is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered the District's internal control over compliance with the types of requirements that could have a direct and material effect on each major Federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for each major Federal program and to test and report on internal control over compliance in accordance with the Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of the District's internal control over compliance.

*A deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a Federal program on a timely basis. *A material weakness in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a Federal program will not be prevented, or detected and corrected, on a timely basis. *A significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a Federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

Respectfully submitted,

A handwritten signature in blue ink that reads "Sherrill F. Norman". The signature is written in a cursive style with a large initial "S".

Sherrill F. Norman, CPA  
Tallahassee, Florida  
February 28, 2020

# **SCHEDULE OF FINDINGS AND QUESTIONED COSTS**

## **SECTION I – SUMMARY OF AUDITOR’S RESULTS**

### **Financial Statements**

Type of auditor’s report issued on whether the financial statements audited were prepared in accordance with GAAP: Unmodified

Internal control over financial reporting:

    Material weakness(es) identified? No

    Significant deficiency(ies) identified? Yes

Noncompliance material to financial statements noted? No

### **Federal Awards**

Internal control over major Federal programs:

    Material weakness(es) identified? No

    Significant deficiency(ies) identified? None reported

Type of auditor’s report issued on compliance for major Federal programs: Unmodified

Any audit findings disclosed that are required to be reported in accordance with 2 CFR 200.516(a)? No

Identification of major Federal programs:

CFDA Numbers:	Name of Federal Program or Cluster:
10.553, 10.555, and 10.559	Child Nutrition Cluster
84.367	Supporting Effective Instruction State Grants
93.600	Head Start

Dollar threshold used to distinguish between type A and type B programs: \$750,000

Auditee qualified as low risk auditee? No

## SECTION II – FINANCIAL STATEMENT FINDINGS

### SIGNIFICANT DEFICIENCIES

#### BANK ACCOUNT RECONCILIATIONS

<b>Finding Number</b>	<b>2019-001</b>
<b>Opinion Unit</b>	Major Fund: General Fund
<b>Financial Statements</b>	
<b>Account Titles</b>	Cash, Accounts Receivable, and Miscellaneous Local Revenues
<b>Fund Name</b>	General Fund
<b>Adjustment Amounts</b>	General Fund: Additions of \$293,277 (debit) to Cash and deductions of \$619,771 (credit) to Accounts Receivable, and deductions of \$326,494 (debit) to Miscellaneous Local Revenues.
<b>Prior Year Finding</b>	2018-001, Report No. 2019-162
<b>Finding</b>	District controls over cash continue to be deficient as reconciliations of District bank account balances to general ledger account balances were not always performed.
<b>Criteria</b>	<p>Section 1010.01(5), Florida Statutes, requires each school district to establish and maintain internal controls designed to, among other things, detect fraud, ensure reliability of financial records and reports, and safeguard assets. Effective internal controls require that reconciliations of bank account balances to general ledger account balances be performed on a timely, routine basis.</p> <p>Properly prepared bank account reconciliations are necessary to provide reasonable assurance that cash assets agree with recorded amounts, promptly detect cash account errors or fraud, identify and correct unrecorded and improperly recorded cash transactions, and provide for the efficient and economic management of cash resources.</p>
<b>Condition</b>	<p>The District maintained seven bank accounts during the 2018-19 fiscal year and, at June 30, 2019, the District's adjusted general ledger and financial statement cash account balances each totaled \$3,526,822. As of January 2020, bank account reconciliations for December 2017 through June 2019 had not been completed for two bank accounts. At June 30, 2019, the general ledger cash account balances totaled \$2,086,960 and bank statement cash balances totaled \$4,609,561 for the two bank accounts. In addition, as of January 2020, bank account reconciliations for June 2018 through June 2019 had not been completed for another bank account with a general ledger cash account balance of \$291,519 and bank statement cash balance of \$505,147 at June 30, 2019.</p> <p>We extended our audit procedures to determine the adjustments necessary to ensure that cash balances were materially correct at June 30, 2019, and District personnel accepted these adjustments. However, our procedures cannot substitute for management's responsibility to implement adequate controls over the bank account reconciliation process.</p>
<b>Cause</b>	<p>Our examination of District records and discussions with District personnel disclosed that, although general ledger cash account balances were promptly reconciled to bank account statement balances for four District bank accounts, District personnel relied on online activity reports to monitor cash balances and cash needs for the other three accounts. In addition, District personnel indicated that, due to Business and Finance Department personnel turnover and limited training on the District's new accounting system, bank account reconciliations were not always prepared.</p>

<b>Effect</b>	Absent effective procedures for the timely preparation of bank account reconciliations, there is an increased risk that any cash transaction errors or fraud that may occur will not be timely detected. Additionally, without such procedures, the reliability of the general ledger financial information throughout the year and the Board's ability to effectively monitor the District's financial position is diminished.
<b>Recommendation</b>	The District should enhance procedures to ensure that reconciliations of bank account balances to the general ledger account balances are timely performed with reconciling items promptly identified, thoroughly investigated, adequately documented, and resolved. Such enhancements should include appropriate training for employees who perform bank account reconciliations and for employees who use the District accounting system.
<b>District Response</b>	The District is committed to ensuring that reconciliations of bank account cash balances to the general ledger account balances by fund. The District will work to timely perform the reconciliations and to promptly identify any reconciling items.

### **INFORMATION TECHNOLOGY ACCESS PRIVILEGES**

<b>Finding Number</b>	<b>2019-002</b>
<b>Opinion Units</b>	Not Applicable
<b>Financial Statements Account Titles</b>	Not Applicable
<b>Fund Names</b>	Not Applicable
<b>Adjustment Amounts</b>	Not Applicable
<b>Prior Year Finding</b>	2018-002, Report No. 2019-162

**Finding** Four employees and three contracted consultants had full update access privileges to information technology (IT) applications or components that allowed them to perform functions incompatible or inconsistent with their assigned job responsibilities.

**Criteria** Section 1010.01(5), Florida Statutes, requires each school district to establish and maintain internal controls designed to, among other things, detect fraud, ensure reliability of financial records and reports, and safeguard assets. Access controls are intended to protect District data and IT resources from unauthorized disclosure, modification, or destruction. Effective access controls include granting IT users access privileges to IT resources based on a demonstrated need to view, add, modify, or delete data and restrict employees from performing functions incompatible or inconsistent with their assigned job responsibilities.

**Condition** The District implemented a new accounting system in October 2017 composed of finance and human resource (HR) applications, as well as a product setup component that allows for the technical configuration and system administration of both applications. The District finance application includes, for example, the ability to create and edit vendor information, create and post journal entries, and process payment transactions. The District HR application includes, for example, the ability to add new employees, adjust pay rates, edit leave balances, and approve payroll transactions. The product setup component includes, for example, the ability to add modify, or delete data; create IT user accounts; and assign IT user access privileges to the District applications and setup component.

As part of our audit, we examined District records supporting the IT access privileges granted to 61 IT users during the 2018-19 fiscal year to the District applications and setup component. We found that:

- Two employees, the Finance Director and the Budget Director, and a contracted consultant who assisted with the accounting system transition, had full update access privileges to both the finance and HR applications

as well as the product setup component that allowed them to perform functions incompatible or inconsistent with their assigned job responsibilities. For example, with these privileges, the individuals could perform the incompatible functions of processing transactions and modifying the data underlying the transactions.

- An accounting clerk and a contracted consultant, who assisted with the financial reporting process, had full update access privileges to the finance application that allowed them to perform functions incompatible or inconsistent with their assignment or contracted service responsibilities. For example, with these privileges, the individuals could perform the incompatible functions of entering, updating, approving, and posting journal entries.
- A human resource specialist and a contracted consultant, who assisted with employee benefits and insurance, had full update access privileges to the HR application that allowed them to perform functions incompatible or inconsistent with their assignment or contracted service responsibilities. For example, with these privileges, the individuals could perform the incompatible functions of creating and updating employee profiles, entering and adjusting pay grades, and issuing pay checks.

<b>Cause</b>	District personnel indicated that full update access privileges were given to the four employees and three contracted consultants to smooth daily operations and to provide back-up personnel to continue with uninterrupted critical District operations in the absence of the key personnel.
<b>Effect</b>	<p>The existence of inappropriate or unnecessary IT access privileges increases the risk that unauthorized disclosure, modification, or destruction of District data and IT resources may occur and not be timely detected.</p> <p>Our examination of District records supporting selected transactions, along with our analytical procedures comparing financial statement reported amounts to amounts expected based on corroborating evidence, indicated those transactions were properly supported; however, our procedures cannot substitute for management's responsibility to establish and maintain an adequate system of internal control.</p>
<b>Recommendation</b>	District management should take appropriate action to ensure that assigned IT access privileges restrict employees from performing functions incompatible or inconsistent with their assigned job responsibilities.
<b>District Response</b>	The District shall ensure that IT access to software be restricted to employees performing functions consistent with their assigned job responsibilities.

### SECTION III – FEDERAL AWARD FINDINGS AND QUESTIONED COSTS

No matters are reported.



## ***PRIOR AUDIT FOLLOW-UP***

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The District had taken corrective actions for findings included in our report No. 2019-162, except as discussed in Finding Nos. 2019-001 and 2019-002.

# SUMMARY SCHEDULE OF PRIOR AUDIT FINDINGS



## THE SCHOOL BOARD OF GADSDEN COUNTY

35 Martin Luther King, Jr. Blvd  
 Quincy, Florida 32351  
 Main: (850) 627-9651 or Fax: (850) 627-2760  
 www.gcps.k12.fl.us

**Roger P. Milton**  
*Superintendent*  
 miltonr@gcpsmail.com

*"Putting Children First"*

Audit Report No. (Finding No.)	Program/Area	Brief Description	Status	Comments
2019-162 (2018-001)	Bank Account Reconciliations	District procedures did not always provide for timely bank account reconciliations.	Partially corrected.	The District's Finance Department has been in the process of resolving previous outstanding balances and making the essential reconciliations timely and accurate.
2019-162 (2018-002)	Information Technology Access Privileges	Eleven employees had full update access privileges to information technology applications or components that allowed them to perform incompatible functions or functions that were not necessary to perform their assigned job responsibilities.	Partially corrected.	The District's Information Technology Department has been in the process of restricting the access for the designated employees to be compatible with their respective functions and to not obstruct the District's critical operating activities.
2019-162 (2018-003)	Child Nutrition Cluster (CNC) (CFDA Nos. 10.553, 10.555 and 10.559)	Contrary to the Florida Department of Agriculture and Consumer Services requirement, the District overcharged indirect costs to the CNC by applying the unrestricted instead of the restricted indirect cost rate, resulting in questioned costs totaling \$274,284.	Fully corrected.	

**Audrey Lewis**  
 DISTRICT NO. 1  
 HAVANA, FL 32333  
 MIDWAY, FL 32343

**Steve Scott**  
 DISTRICT NO. 2  
 QUINCY, FL 32351  
 HAVANA, FL 32333

**Leroy McMillan**  
 DISTRICT NO. 3  
 CHATTahooCHEE, FL 32324  
 GREENSBORO, FL 32330

**Charlie D. Frost**  
 DISTRICT NO. 4  
 GRETNA, FL 32332  
 QUINCY, FL 32352

**Tyrone D. Smith**  
 DISTRICT NO. 5  
 QUINCY, FL 32351

*"The Gadsden County School District does not discriminate against any person on the basis of sex (including transgender status, gender nonconforming, and gender identity), marital status, sexual orientation, race, religion, ethnicity, national origin, age, color, pregnancy, disability, or genetic information."*

# CORRECTIVE ACTION PLAN

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*"Putting Children First"*

## THE SCHOOL BOARD OF GADSDEN COUNTY

35 Martin Luther King, Jr. Blvd  
Quincy, Florida 32351  
Main: (850) 627-9651 or Fax: (850) 627-2760  
www.gcps.k12.fl.us

**Roger P. Milton**  
*Superintendent*  
miltonr@gcpsmail.com

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### Gadsden County District School Board Management's Corrective Action Plan For the Fiscal Year Ended June 30, 2019

**Finding Number:** 2019-001.  
**Planned Corrective Action:** The District allocated resources in time and effort to ensuring that cash reconciliations are timely for all bank accounts. The financial software applications are being utilized to enhance the processing of the reconciliations and identify any differences with the appropriate documentation.  
**Anticipated Completion Date:** June 30, 2020  
**Responsible Contact Person:** Bonnie Wood

**Finding Number:** 2019-002.  
**Planned Corrective Action:** The District is exploring strategies to restrict access throughout personnel changes caused by the retirement of experienced employees and also continue essential financial functions. The division of duties is an integral component of the internal controls of the District and efforts are underway to demonstrate this component in software access for financial transactions.  
**Anticipated Completion Date:** April 30, 2020  
**Responsible Contact Person:** Darlean Youmans

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**Audrey Lewis**  
DISTRICT NO. 1  
HAVANA, FL 32333  
MIDWAY, FL 32345

**Steve Scott**  
DISTRICT NO. 2  
QUINCY, FL 32351  
HAVANA, FL 32355

**Leroy McMillan**  
DISTRICT NO. 3  
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**SUMMARY SHEET**

**RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA**

**AGENDA ITEM NO.** 8a

**DATE OF SCHOOL BOARD MEETING:** March 24, 2020

**TITLE OF AGENDA ITEMS:** Membership in P.O.W.E.R Buying Group for fiscal year 2020-2021

**DIVISION:** Finance Department and Food Service Department

**PURPOSE AND SUMMARY OF ITEMS:** Board approval is requested for continuing membership in the P.O.W.E.R. Buying Group for the 2020-2021 fiscal year. This group facilitates the purchasing of food and supply products at competitive prices in compliance with the rules and regulations of all child nutrition programs.

**FUND SOURCE:** 4100 School Food Service

**AMOUNT:** Approximately \$2,500,000.00

**PREPARED BY:** Bonnie Wood

**POSITION:** Finance Director



## 2020 - 2021 SY LETTER OF AGREEMENT

To participate in the P.O.W.E.R. Buying Group (PBG)  
For the term of July 1, 2020 – June 30, 2021

### Gadsden County Foodservice

Name of Member's School Nutrition Program

**PBG's purpose** is to facilitate the members' processes for purchasing high quality food and supply products at competitive prices in compliance with all applicable guidance and regulations for their child nutrition programs.

The price solicitations and RFP, "Distribution of Food and Non-food Products for the P.O.W.E.R. Buying Group SDOC-14-P-065-LH" are hosted by the School District of Osceola County. Approval of PBG's participation has been provided by a majority vote of the members **after distributor agrees to addition as per RFP.**

**IMPORTANT:** Food item pricing includes commercial pricing; and, if applicable, Net-Off-Invoice (NOI) or Modified-Fee-For-Service Through Distribution (MFFS) pricing for further-processed USDA Foods.

**Termination of this Agreement** by a member is permitted with written notice received by the Executive Director a minimum of ninety (90) days prior to the start of the next PBG fiscal year.

**Special conditions** directly impacting the member's continued participation in the PBG bids are to be presented to the Executive Director as soon as possible for review by the PBG Executive Board.

**Due date** for this Letter of Agreement with category participation completed and required signatures is **Friday, April 10, 2020** to be electronically mailed to the Executive Director at the e-mail address on the cover letter and end of the agreement.

#### For the term of this Agreement, each member shall:

- It is the member districts responsibility to keep up to date with all PBG information to include, face to face member meetings, conference calls, minutes, and email communications.
- Issue blanket purchase orders to the distributor (US Foods) to cover purchases of the food and supply items effective July 1, 2020 through June 30, 2021.
- Purchase bid items from the distributor in strict adherence with the terms, conditions, and unit prices of the School District of Osceola County, SDOC-14-P-065-LH, and all related addenda; as well as all applicable federal, state and local statutes, regulations, and ordinances and member purchasing policies and procedures.
- Differentiate bid and market items on orders in a manner that aids identification of the market items for audit purposes. (**Best practice:** non-bid and market items should be on a separate invoice for audit purposes.)
- Pay all distributor invoices per the contract terms for food and supplies received. Distributor and member will work to resolve disputed invoices to facilitate timely payments. Undisputed invoices 90 days or more past due may result in the account being put on stop shipment until paid in full.

- Cooperatively contribute time and expertise (of one or more staff members as appropriate) to price solicitation development, product testing and evaluation to improve the product pricing for the benefit of all members.
- Provide the distributor all cycle menus for Breakfast, Lunch, Afterschool Snacks, Supper, and Summer Feeding programs, and provide advance forecasts of food and supply items as requested by the distributor.
- As USDA product deliveries permit, work with the distributor to achieve and maintain compliance with USDA guidance on food distribution, on Donated Food Storage, Distribution, and Product Dating.
- Provide accurate and complete information (including surveys, votes, required forms and website profiles, etc.) requested by the Executive Board and/or Committee/Division Chair(s) by the stated deadline or according to established procedures.
- Review members' administrative procurement policies and procedures to ensure compliance with PBG stated guidance.
- Determine current allocations for USDA Foods, if applicable, based on PBG processed USDA Foods price solicitations and piggyback other existing bids only when needed to deplete previous allocations of USDA Foods.
- Adhere to the Mission Statement, Code of Ethics, Bylaws, and Policies and Procedures as approved by PBG members.
- Communicate distributor concerns and requests accurately to the members' US Foods representatives in a timely manner, sending copies of all incident reports and pictures to PBG Division Chair, Executive Director and Distributor's Director of Business Development.
- Communicate PBG concerns, questions and ideas to Division Chair and PBG Executive Director.
- Remit the annual service fee of \$4,500\* prior to the August 30, 2020 due date. Payments made during September 2020 will be assessed an additional 5% late fee.

*NOTE: Failure to pay the annual fee invoice by September 30, 2020 may result in initiation of the termination process.*

Failure to adhere to all elements of this Letter of Agreement may qualify as grounds for termination of member's access to PBG pricing and services up to 36 months. Noncompliant members will receive notification of the initiation of the termination process which includes an opportunity for resolution of the noncompliant issue(s). The termination will be effective twelve (12) weeks after the PBG Executive Board decision is issued.

\*Current Executive Committee members will receive a discount to the annual service fee on the 2020 - 2021 invoices as stated below:

- Chair discount is \$1,500
- RFP Host District discount is \$1,500

- Chair-Elect discount is \$1,000
- Division and Committee Chairs' discounts are \$500 each

### ***PBG Member Determination Bid Category Participation***

Members will provide information below on their participation decisions for the 2020 – 2021 school year.

PBG members are ***not required*** to participate in all product categories.

Please **circle Yes or No** and **add the School Nutrition Program Administrator's initials** for each category:

Yes No PM Main Line Items (**required category**)  
Initials

Yes  No \_\_\_\_\_ PBG's awarded distributor (US Foods) for Storage and Distribution of USDA Foods  
Initials (**Brown box, NOTE: storage fee per case after 90 days is \$4.00/month**)

Yes No PM Disposable Products  
Initials

Yes No PM Bread Items  
Initials

Yes No PM 100% Fruit Juice - Frozen  
Initials

Yes No PM Fresh Produce  
Initials

Yes No PM Small wares/Custodial Supplies  
Initials

Yes No PM Cleaning Supplies  
Initials

The member acknowledges that as in any successful partnership, it is imperative that all participants work cooperatively to achieve maximum benefit both individually and collectively. Members providing accurate, complete information as requested directly contribute to the total effectiveness of the PBG. The PBG is committed to provide all members quality products, which are competitively priced, in compliance with all guidance and regulations in an effective, efficient manner.

**P.O.W.E.R. Buying Group Mission Statement**

The mission of the POWER Buying Group is to work collaboratively to procure high quality, competitively priced foods and supplies that will enhance the health and nutritional well-being of students participating in Florida Child Nutrition Programs.

Administrative Authority Signature	Title	Date
<u>Paula Milton</u>	<u>FSPC</u>	<u>3-5-20</u>
Purchasing Authority Signature	Title	Date
PBG Chair Signature		Date

Note: Please electronically mail the completed and signed Letter of Agreement to the PBG Executive Director no later than **Friday, April 10, 2020** at: [powerbuyinggroup@gmail.com](mailto:powerbuyinggroup@gmail.com).





March 2, 2020

PBG Member,

Each year, all P.O.W.E.R. Buying Group (PBG) Members are required to sign a Letter of Agreement (LOA) to participate and piggyback on product pricing approved for use by the POWER Buying Group. The Executive Committee made some changes to the letter of agreement for the 2020/21 SY. Those changes are highlighted in yellow.

It is the intention of the PBG Executive Committee to allow the school meal program administrators to express their intent to participate in various product award categories. This will allow each Member the opportunity to tailor PBG participation based upon each program's specific needs.

Members must complete and electronically return the Letter of Agreement with applicable signatures to Rae Hollenbeck, PBG Executive Director, at [powerbuyinggroup@gmail.com](mailto:powerbuyinggroup@gmail.com) no later than **Friday, April 10, 2020**. The PBG Chair will sign all LOAs and Members will receive signed copies at the Summer Member Meeting in June 2020. Invoices for the \$4,500 annual service fee will be emailed in June and due by Monday, August 31, 2020.

Thank you for your participation as a Member of the POWER Buying Group. Your continued support of the PBG Mission assures our Group's success.

Sincerely,

Lauren Jones, PhD  
Chair,  
The P.O.W.E.R. Buying Group

**SUMMARY SHEET**

**RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA**

**AGENDA ITEM NO.** 8b

**DATE OF SCHOOL BOARD MEETING:** March 24, 2020

**TITLE OF AGENDA ITEMS:** Membership in BuyBoard Purchasing Cooperative

**DIVISION:** Finance Department

**PURPOSE AND SUMMARY OF ITEMS:** Board approval is requested for becoming a member of the National BuyBoard Purchasing Cooperative. Membership is free in this cooperative that will enable the District to utilize publicly-bid goods and services. All schools and departments would benefit, especially Maintenance.

**FUND SOURCE:** All funds can benefit

**AMOUNT:** -0-

**PREPARED BY:** Bonnie Wood

**POSITION:** Finance Director



(/Home.aspx)

## National Cooperative (/National.aspx)

**About Us**

**How to Join**

**Resources**

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About Us (<https://www.buyboard.com/National/About-Us.aspx>)

How to Join (<https://www.buyboard.com/National/How-to-Join.aspx>)

Resources (<https://www.buyboard.com/National/Resources.aspx>)

Home (/national.aspx) > How to Join

## Ready to Join BuyBoard?

Becoming a member of the National Purchasing Cooperative, d/b/a National BuyBoard® or BuyBoard®, requires only a few simple steps – and membership is free!

### Governmental Entities

Complete the required fields below to execute the National Purchasing Cooperative Interlocal Participation Agreement on behalf of your entity and become a BuyBoard member. Review the *Interlocal Participation Agreement* (/National/documents/interlocal-participation-agreement.pdf). If you prefer to execute a hard copy of the Agreement, click the Resources tab above and email [buyboard@nsba.org](mailto:buyboard@nsba.org) (mailto:buyboard@nsba.org) the completed and signed agreement.

**If action by your entity's governing body is required prior to joining**, follow your policy/procedure before agreeing and submitting the Interlocal Participation Agreement to establish your membership.

### Nonprofit Entities and Texas Governmental Entities

#### **DO NOT COMPLETE THIS FORM**

Nonprofit entities must complete the *Nonprofit Subscriber Agreement* ([https://www.buyboard.com/documentation/nonprofit\\_subscriber\\_agreement.aspx](https://www.buyboard.com/documentation/nonprofit_subscriber_agreement.aspx)) and Texas governmental entities must complete The Local Government Purchasing Cooperative (a.k.a. Texas Cooperative) Interlocal Participation Agreement, and e-mail [info@buyboard.com](mailto:info@buyboard.com) (mailto:info@buyboard.com?subject=BuyBoard%20Membership) the agreement to the BuyBoard to establish membership.

### Vendors

#### **DO NOT COMPLETE THIS FORM**

As a vendor, the first step is to register as a new supplier/vendor at How to Register (/Vendor/How-to-Register.aspx). *Registering does not grant your company the right to sell to BuyBoard members.* Vendors must be awarded a BuyBoard contract in order to sell through the BuyBoard.

**Entity**

The School Board Of Gadsden County, FL

**Coordinator Name (May be different from signor of Agreement below)**

Andrea Lawson

**Coordinator E-mail**

lawsona@gcpsmail.com

**Coordinator Title**

Purchasing Agent

**Entity Address**

35 Martin Luther King Jr Blvd

**Entity City**

Quincy

**State**

FL

**Zip Code**

32351

**Entity Phone**

( 850 ) 627 - 9651

**Entity Fax**

( ) -

You must read the agreement:

Cooperative Member; by U.S. mail, postage prepaid, and delivered to the Cooperative Member's Coordinator or chief executive officer (e.g., superintendent, city manager, county judge or mayor); or other mode of delivery typically used in commerce and accessible to the intended recipient.

15. Severability. If any portion of this Agreement shall be declared illegal or held unenforceable for any reason, the remaining portions shall continue in full force and effect.

16. Signatures/Counterparts. The failure of a party to provide an original, manually executed signature to

Downloadable Interlocal Participation Agreement (<https://www.buyboard.com/National/documents/interlocal-participation-agreement.pdf>).

**By selecting the "I agree" box, entering your name, and clicking the "Submit" button, you are signing the National Purchasing Cooperative Interlocal Participation Agreement electronically, agreeing that you are the Authorized Representative for your governmental entity, that you have read the agreement, and that your entity is legally bound by the terms and conditions of the agreement. You agree your electronic submission is the legal equivalent to your manual signature on this agreement and represent that you are authorized to bind the entity to this agreement. If action by your entity's governing body is required prior to joining, you agree that you have followed your policy/procedure before agreeing and submitting the Interlocal Participation Agreement to establish membership.**

**I AGREE**

**Governing Body Approval Required**

Yes  No

**If yes, Date Approved**

**Name of Authorized Representative/Electronic Signor**

**Title of Authorized Representative**

**E-mail of Authorized Representative**

### Today's Date

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**SUMMARY SHEET**

**RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA**

**AGENDA ITEM NO.** 8c

**DATE OF SCHOOL BOARD MEETING:** March 24, 2020

**TITLE OF AGENDA ITEMS:** Annual Membership in the Florida School Boards Association for  
2020-2021 Fiscal Year

**DIVISION:** Finance Department

**PURPOSE AND SUMMARY OF ITEMS:** Board approval is requested for continuing  
membership in the Florida School Boards Association for the 2020-2021 Fiscal Year.

**FUND SOURCE:** 1100 General Fund

**AMOUNT:** \$10,455.00

**PREPARED BY:** Bonnie Wood

**POSITION:** Finance Director



# Florida School Boards Association

*The voice of education in Florida.*

**MEMORANDUM**

**March 1, 2020**

**TO: School Board Chairmen**

**FROM: Tim Weisheyer, FSBA President**  
**Cindy Stuart, FSBA Treasurer**  
**Andrea Messina, FSBA Executive Director**

**SUBJECT: Annual FSBA Dues Renewal**

You are a valued member of FSBA. Your continued leadership and commitment to your students and community is appreciated. Our members consistently tell us that one of the greatest values we serve is providing the intellectual and physical space for ongoing dialogue and networking with peers across the state. You and your district are an integral part of that network.

Your FSBA staff, with over 100 years of experience in education, proudly serves you every day. We maintain the mission of increasing student achievement through the development of advocacy and leadership in public education. The Florida School Boards Association is the largest professional association for Florida School Board members. In addition to representing your views before the State Board of Education, the Department of Education, Florida Legislature, Congress and others, we pride ourselves on growing and adapting to best serve our members, and in turn, the students of Florida.

Your district dues help to ensure that FSBA is able to maintain the benefits members have come to expect, that include, but are not limited to:

- on-call consultation services, our most valued benefit
- regular publications, updates and analyses
- newsfeed and legislative tracking and summaries
- \$100,000 accidental death insurance policy
- exclusive access to National membership associations and trainings
- discounts on valued products and service

Your dues also allow the association to continue to improve and expand the services, trainings, and resources our members request. Visit <https://tinyurl.com/18-19FSBAAnnualRpt> to see the full accomplishments from the 2018-2019 year via our State of the Association Annual Report.

FSBA bylaws require the General Membership to approve dues rates at the Annual Joint Conference meeting. On December 5, 2019, the General Membership unanimously approved the 2020-21 dues schedule.

We sincerely appreciate your sustained membership and look forward to continuing to serve you through your voice—our voice—the voice of education in Florida.

## Enclosure

**Cc: Superintendents**  
**School Board Support Staff**

**TW/CS/ADM/ld**



**FLORIDA SCHOOL BOARDS ASSOCIATION**  
**(850) 414-2578 FAX (850) 414-2585**  
**203 S. MONROE STREET**  
**TALLAHASSEE, FL 32301**  
**www.fsba.org**

# INVOICE

INVOICE DATE  
3/1/20

INVOICE NO.  
11995

GADSDEN CO SCHOOL BOARD  
35 MARTIN LUTHER KING JR BLVD  
QUINCY, FL 32351

PURCHASE ORDER NO.

ITEM DESCRIPTION

PRICE

2020-21 Annual FSBA Dues (7/1/2020 - 6/30/2021) Should an individual board member wish to invoke 617.221 (2) F.S., please adjust invoice accordingly.

10,455.00

Copy

TOTAL AMOUNT DUE

\$10,455.00

SUMMARY SHEET  
RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA


**AGENDA ITEM NO.** 8d  
**DATE OF SCHOOL BOARD MEETING:** March 24, 2020

**TITLE OF AGENDA ITEM:** Approval of a contract with PAEC to facilitate the Board Approved U.S. Department of Education (USDE) Grant Award for Elevate Rural Florida (ERF) a.k.a. School Climate Transformation Grant

**DIVISION:**  
       This is a CONTINUATION of a current project, grant, etc.

**PURPOSE AND SUMMARY OF ITEM:**  
This Contract finalizes the responsibilities of each partner in the previously Board approved grant award that will implement an evidence-based climate transformation initiative in 16 high-need schools across six rural counties in PAEC. This is a USDE grant. Gadsden is the fiscal agent and will be partnering with Franklin, Jefferson, Liberty, Madison, and Taylor County School Districts. The five-year project will serve 700 instructional and leadership staff and impact over 13,000 K-12 students. The project will integrate and enhance multi-tier systems of support (MTSS) with restorative, equity-focused and culturally responsive practices. Three primary goals of the project are to improve school climate through MTSS implementation; reduce inequities including student disparities in discipline and academic performance; and develop sustainability through family engagement and community partnerships. Professional learning opportunities will be provided to staff, along with technical assistance to implement MTSS with fidelity. Professional Learning Communities will be developed to help implement restorative practices and social-emotional learning. Cross-district mental health specialists will provide coaching, training, and support to targeted staff and schools. The project's intended outcomes are to decrease discipline incidents, decrease substance abuse, improve academic performance, and improve school climate at targeted high-need schools.

**FUND SOURCE:** FEDERAL  
**AMOUNT:** \$739,286.00 year 1  
\$725,631.00 year 2  
\$703,631.00 year 3  
\$692,631.00 year 4  
\$681,443.00 year 5  
Total \$3,542,602.00

**PREPARED BY:** Dr. Maria Pouncey/Rose Raynak   
**POSITION:** Directors

---

**INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER**  
       Number of ORIGINAL SIGNATURES NEEDED by preparer.  
**SUPERINTENDENT'S SIGNATURE:** page(s) numbered \_\_\_\_\_  
**CHAIRMAN'S SIGNATURE:** page(s) numbered \_\_\_\_\_  
**REVIEWED BY:** \_\_\_\_\_

**School Board of Gadsden County, Florida**  
**CONTRACTUAL AGREEMENT**  
**Fiscal Year: 2019-2024**  
**based on annual renewal of award by U.S. Department of Education**

This contractual AGREEMENT is made between the School Board of Gadsden County, Florida, a school district, referred to as the “RECIPIENT” or “FISCAL AGENT”, organized and existing under the laws of the State of Florida, with its principal place of business at 35 Martin Luther King., Jr. Blvd, City of Quincy, County of Gadsden, State of Florida, and Panhandle Area Educational Consortium (PAEC), through its district of record and fiscal agent the Washington County School District, an regional educational agency with their principal place of business at 753 West Boulevard, Chipley, FL 32428, referred to as “CONTRACTOR”, for the purposes of providing a multi-county evidence-based climate transformation initiative in 16 high-need schools across six rural counties as have been funded in the U.S. Department of Education (USDE) direct federal grant for Elevate Rural Florida - School Climate Transformation. The contractual AGREEMENT will establish uniform administrative requirements for the CONTRACTOR and the School Board of Gadsden County.

NOW, THEREFORE, the parties agree as follows:

**ARTICLE 1. ENGAGEMENT OF THE CONTRACTOR**

The RECIPIENT agrees to engage the CONTRACTOR and the CONTRACTOR agrees to perform the functions as outlined in their agreement with the School Board of Gadsden County to provide all contract services, reporting, monitoring, and follow-up required in the USDE Elevate Rural Florida – School Transformation Grant for Franklin, Jefferson, Liberty, Madison, Gadsden, and Taylor County Public School Districts for the full five years of the grant as further set forth below. The RECIPIENT will act as the FISCAL AGENT for all recipient school districts of the services provided by the CONTRACTOR. The CONTRACTOR understands and agrees that all services contracted are to be performed solely by the CONTRACTOR and may not be subcontracted for or assigned without the prior written consent of the RECIPIENT.

**The RECIPIENT and CONTRACTOR understand and agree that this AGREEMENT is valid only for the years the USDE grant is awarded to the School Board of Gadsden County as fiscal agent. In addition, the RECIPIENT and CONTRACTOR understand and agree that continuation of this AGREEMENT is contingent upon provision of acceptable levels of service, positive implementation results, meeting all reporting deadlines and requirements, approval from the Gadsden County School Board, and continued funding available through USDE Federal dollars to fund the Elevate Rural Florida initiative.**

**ARTICLE 2. SCOPE OF SERVICES**

***Project Summary:*** School Climate Transformation Grant provides funding for improving school climate through the development, enhancement, or expansion of multi-tiered systems of support. The proposed project will expand and refine schools’ Positive Behavior System frameworks and implement evidence-based Social-Emotional programs designed to: improve school safety; promote supportive academic, disciplinary, and physical environments; and encourage and maintain respectful, trusting, and caring relationships throughout the school community.

The CONTRACTOR agrees to provide all services related to improving school climate in the six rural counties in the identified schools as specifically described in Appendix A. Broad areas of services with responsibilities further described in Appendix A include:

- Improving school climate through enhanced quality, fidelity, and consistency of Multi-Tier System of Support (MTSS) implementation, including:
  - Implementing consistent universal screening processes
  - Integrating and aligning academic and behavioral systems for problem-solving and data driven decision making
  - Supporting school-wide MTSS through professional development, targeted technical assistance, and job-embedded coaching and feedback
  - Evaluating the fidelity of MTSS implementation
  - Empirically assessing the impact of Elevate Rural Florida on school climate (including safety, engagement, and environment) and student achievement
- Reduce inequities, including racial, social, and socio-economic disparities in discipline and academic performance, through equity-focused social-emotional learning and culturally responsive restorative justice practices, including:
  - Expanding implementation of equity-focused Social-Emotional Learning (SEL) within the MTSS framework
  - Implementing culturally responsive restorative justice practices within the MTSS framework
  - Facilitating school-wide substance abuse prevention within the MTSS framework
  - Expanding capacity for evidence-based, targeted, and differentiated Tier 2 service provisions
- Sustaining climate change through family and community engagement, including:
  - Strengthening partnerships with community-based mental health and social service providers
  - Enhancing family engagement with school and community services

CONTRACTOR shall be responsible for timely complying with all program and performance reporting requirements as set out in the Grant Award Notification Reporting Requirements.

Any change to the services above must be made by mutual AGREEMENT in writing with the RECIPIENT, Superintendent and CONTRACTOR.

**ARTICLE 3. RECIPIENT’S Indirect Costs and Project Staff Allocations and Responsibilities**

The RECIPIENT Gadsden County will receive all unrestricted indirect costs as FISCAL AGENT for the project and the project staff allocation for project manager as well as three full-time positions of Licensed Clinical Social Worker, and two Social Workers.

**Project Manager**

The Project Manager will be the primary person responsible for collecting documentation, verifying financial compliance and allowability of the project activity expenditures. The Project Manager will provide PAEC staff Project Director with documents to upload into the G5 system for fiscal reporting to USDE, purchase order development; invoicing of contracts; and payroll of staff on the project. In addition, the Project Manager will work with any USDE staff on project site visits and review of financial expenditures and documentation in addition to all services identified in the scope of the grant.

**Psychologist/Social Worker Specialist (LCSW) – Regional (1 staff)**

The Psychologist or Social Work Specialist will work under the direction of the PAEC Project Director. Staff will work in schools in the districts that have no social workers or psychologist on site. They will provide guidance, training to teachers, district staff, and/or parents and students

as needed. They will also train and/or facilitate informational sessions to implement improvements to the school mental health system.

**Regional Mental Health Staffing (2 staff)**

Two mental health staff will be hired. Mental health staff will work under the direction of the psychologist/social work specialist. The mental health staff will be trained to provide district, school, and community training on Youth Mental Health First Aid, Restorative Aid, Restorative Practices, Emotional Poverty and Social Emotional Learning. They will also work in the schools supporting teachers and students while providing follow-up and implementation support to trained staff including facilitating PLCs to support continuity.

CONTRACTOR shall be responsible for timely compliance with all program and performance reporting requirements as set out in the Grant Award Notification Reporting Requirements.

**ARTICLE 4. DURATION OF AGREEMENT**

This AGREEMENT shall begin on the week of January 28, 2020 and end September 30, 2024 and is contingent upon the annual renewal by USDE and the approval by the district School Board as stated in Article 1 above. As required by law, this AGREEMENT shall be subject to review and renewal if performance is deemed satisfactory, and if the Superintendent recommends approval and the School Board approves the recommendation.

(b). The CONTRACTOR shall begin performing the contract on the week of January 28, 2020 and finish the project by September 30, 2024.

**ARTICLE 5. DEFINITIONS**

<b>Term</b>	<b>Definition</b>
<b>Advance</b>	means a payment made by Treasury check or other appropriate payment mechanism to a CONTRACTOR upon its request either before outlays are made by the CONTRACTOR or through the use of predetermined payment schedules.
<b>Award</b>	means financial assistance that provides support or stimulation to accomplish a public purpose.
<b>Contract</b>	means a procurement contract under an award or sub-award, and a procurement sub-contract under a RECIPIENT'S or CONTRACTOR'S contract. A contract shall be used when the principal purpose is acquisition of property or services for the direct benefit or use of the federal government and/or organization receiving financial assistance. .
<b>Date of Completion</b>	means the date on which all work under an award or sub-award is completed or the date on the award document, or any supplement or amendment thereto, on which Federal sponsorship ends.
<b>Project costs</b>	means all necessary, allocable, reasonable, and allowable costs, as established in the applicable Federal cost principles, incurred by a RECIPIENT and the value of the contributions made by third parties in accomplishing the objectives of the award during the project period.
<b>Project period</b>	means the period established in the award document during which Federal sponsorship begins and ends.
<b>RECIPIENT</b>	means an organization receiving financial assistance directly from the Department of Education to carry out a project or program. The term includes public and private institutions of higher education, public and private hospitals and other quasi-public and private non-profit organizations such as, but not limited to, community action agencies, research institutes, educational

Term	Definition
<b>CONTRACTOR</b>	associations, and health centers. means the legal entity to which a sub-award is made and which is accountable to the RECIPIENT for the use of the funds provided.
<b>Sub-award</b>	means an award of financial assistance in the form of money, or property in lieu of money, made under an award by a RECIPIENT to an eligible CONTRACTOR. The term includes financial assistance when provided by any legal AGREEMENT, even if the AGREEMENT is called a contract, but does not include procurement of goods and services nor does it include any form of assistance which is excluded from the definition of "award". The sub-award <b>does not create a sub-contractor relationship</b> with contracted entity. Sub-awards are awarded to vendors for the procurement of goods and/or services.
<b>Termination</b>	means the cancellation of award, in whole or in part, under an AGREEMENT at any time prior to the date of completion.
<b>Working Capital</b>	means a procedure whereby funds are advanced to the RECIPIENT to cover its estimated disbursement needs for a given initial period.

#### **ARTICLE 6. PAYMENT**

The RECIPIENT shall pay the CONTRACTOR as invoiced for services, contingent upon the RECIPIENT's ability to access funding from USDE, provided in monthly increments not to exceed \$60,000 (sixty thousand dollars) per month, with any remaining balance due that is not carried forward payable at the end of the reporting year. Invoices from the CONTRACTOR must include documentation describing the services rendered by the CONTRACTOR in support of the project for the period that the invoice covers. Invoices will require a minimum of twenty-one (21) days to be processed for payment after an invoice has been approved for payment. In full and complete compensation for all services provided by the CONTRACTOR under this AGREEMENT, the RECIPIENT shall pay to **PAEC** the amount of no more than the federal annual award of \$739,286.00 (seven hundred thirty-nine thousand two hundred eighty-six dollars) for budget period one; \$725,631.00 (seven hundred twenty-five thousand six hundred and thirty-one dollars) for budget period two; \$703,631.00 (seven hundred three thousand six hundred thirty-one dollars) for budget period 3; \$692,631.00 (six hundred ninety two thousand six hundred thirty-one dollars) for budget period four; and \$681,443.00 (six hundred eighty one thousand four hundred and forty-three dollars) for budget period five. All payments are subject to USDE making continuing annual awards available to Gadsden County School Board through electronic drawdowns or reimbursement. Invoices shall be prepared and addressed to: Ms. Bonnie Wood, Director for Finance. Checks shall be made payable to **PAEC** and mailed to PAEC. The invoices will document the services provided, monthly activity logs, agendas and minutes of all meetings and workshops/activities, copies of curriculum developed, faculty/staff meetings monitoring student progress, sign-in sheets, and any other content material or lesson plans developed.

(b) The CONTRACTOR shall not pledge the RECIPIENT'S credit or make the RECIPIENT a guarantor of payment or surety for any contract, debt, obligation, judgment, lien, or any form of indebtedness or pledge its entitlement to receipt of funds as a guaranty of any debt, obligation, judgment, lien, or any form of indebtedness of the CONTRACTOR.

(c) The total cost of the AGREEMENT is no more than \$3,542,602.00 for the five-year award from USDE. If the award is adjusted by USDE at any time during its lifetime, the terms of payment per year and per month will be subject to adjustment by Gadsden County prior to payments to PAEC.

**ARTICLE 7. PUBLIC RECORDS**

Where applicable, documents prepared pursuant to this AGREEMENT may be subject to Florida's Public Records Law. Refusal of the CONTRACTOR to allow public access to such records shall constitute grounds for cancellation of this AGREEMENT.

**ARTICLE 8. ACCESS AND RETENTION OF RECORDS**

The RECIPIENT shall have access to all CONTRACTOR'S records that are directly pertinent to this AGREEMENT. The CONTRACTOR will submit all academic records to the principals so that they can be retained for the required five (5) years after the RECIPIENT makes the final payment and all other pending matters are closed. The CONTRACTOR shall maintain accurate, current, and complete disclosure of all financial and/or activity results/records of the project in accordance with established Federal and District requirements.

**ARTICLE 9. TERMINATION OF AGREEMENT**

The parties hereto contemplate this contract to run for the duration of the grant award subject to annual review and renewal as required by law. Any party wishing to terminate this contract prior to its expiration date shall provide the other party with sixty (60) days written notice. Upon termination, the district shall be responsible for payment of all costs incurred by the CONTRACTOR in the performance of the AGREEMENT prior to termination.

**ARTICLE 10. AMENDMENTS**

Any changes must be mutually agreed upon and incorporated in written amendments to this AGREEMENT.

**ARTICLE 11. INDEPENDENT CONTRACTOR**

The CONTRACTOR is an independent agent and not an employee, sub-contractor, or agent of the RECIPIENT. The CONTRACTOR agrees to comply with all requirements of the Jessica Lunsford Act. The CONTRACTOR shall be acting as an independent CONTRACTOR in the performance of this AGREEMENT, and shall be responsible for the payment of claims for loss, personal injury, death, property damage, or otherwise arising out of any act or omission of their respective employees or agents in connection with the performance of the Services for which they may be held liable under applicable law. Each party shall maintain at its sole expense adequate insurance or self-insurance coverage to satisfy its liability obligations under this AGREEMENT.

**ARTICLE 12. NONDISCRIMINATION AND COMPLIANCE**

The CONTRACTOR shall comply with all federal, state and local laws and ordinances applicable to the work and shall not discriminate on the grounds of race, color, religion, gender, national origin, disability, or age in the performance of work.

**ARTICLE 13. ADMINISTRATION OF AGREEMENT**

- (a) The CONTRACTOR'S contract administrator and contact is Dr. Maria Pouncey, Administrator for Instructional Services and/or her designee.
- (b) The RECIPIENT contract administrator and contact is Ms. Bonnie Wood, Director of Business and Finance and/or her designee.
- (c) All written and verbal approvals must be obtained from the parties' contract administrator or their designees.
- (d) This contract shall be governed by and construed under the laws of the State of Florida.

**ARTICLE 14. AGREEMENT AS INCLUDING ENTIRE AGREEMENT**

This instrument, including any attachments, embodies the entire AGREEMENT of the parties. There are no other provisions, terms, conditions, or obligations. This AGREEMENT supersedes all previous oral or written communications, representations or AGREEMENTS on this subject.

CONFLICT OF INTEREST: As of the date of this AGREEMENT and throughout the term of this agreement, CONTRACTOR agrees that they are not a party to any oral or written contract or understanding or legal or regulatory obligation that will in any way limit or conflict with its ability to fulfill the terms of the AGREEMENT.

**ARTICLE 15. ENFORCEMENT**

Jurisdiction for enforcement of this AGREEMENT shall lie in the courts of Gadsden County, Florida. Any action by a party for enforcement of this AGREEMENT shall be maintained in Gadsden County.

IN WITNESS WHEREOF, the School Board of Gadsden County, Florida and Panhandle Area Educational Consortium have executed this AGREEMENT.

\_\_\_\_\_  
Herbert J. Taylor  
Superintendent of Schools-Washington

\_\_\_\_\_  
Date

\_\_\_\_\_  
Mr. John Selover  
Executive Director, PAEC

\_\_\_\_\_  
Date

\_\_\_\_\_  
Mr. Roger P. Milton  
Superintendent of Schools

\_\_\_\_\_  
Date

\_\_\_\_\_  
Ms. Audrey Lewis  
Chairwoman, Gadsden County School Board

\_\_\_\_\_  
Date



# Appendix A

## Program Responsibilities for Elevate Rural Florida

### Programmatic:

- 1.1 Implement consistent universal screening processes
  - 1.1.1 Train school mental health staff in BIMAS universal screening tool
  - 1.1.2 Provide school staff training on SESIR reporting
- 1.2 Integrate and align academic and behavioral systems for problem-solving and data-driven decision making
  - 1.2.1 Fully integrate MTSS and MTSS: B data systems
  - 1.2.2 Facilitate MTSS PLCs to strengthen collaboration of academic and behavior teams
- 1.3 Support school-wide MTSS through universal professional development, targeted technical assistance, and job-embedded coaching and feedback.
  - 1.3.1 Provide universal, cross-district PD to teachers, leaders, and school staff in MTSS
  - 1.3.2 Provide targeted school and district technical assistance in MTSS
  - 1.3.3 Facilitate job-embedded coaching and mentoring
  - 1.3.4 Facilitate district-, school-, and individual-level progress monitoring, feedback, reflective practice
- 1.4 Evaluate the fidelity of MTSS implementation
  - 1.4.1 Train school/district leaders in Self-Assessment of MTSS implementation tool (SAM)
- 1.5 Empirically assess the impact of Elevate Rural Florida on school climate (including safety, engagement, and environment) and student achievement
  - 1.5.1 Conduct quasi-experimental study to assess overall project impacts
  - 1.5.2 Assess the impact of various implementation factors on program effectiveness
- 2.1 Expand implementation of equity-focused Social Emotional Learning within MTSS framework
  - 2.1.1 Implement evidence-based SEL programs
  - 2.1.2 Facilitate training in Emotional Poverty
- 2.2 Implement culturally responsive restorative justice practices within MTSS framework
  - 2.2.1 Facilitate within-school and cross-district restorative practices PD through Regional Learning Communities Model
- 2.3 Facilitate school-wide substance abuse prevention within MTSS framework
  - 2.3.1 Implement substance abuse prevention curriculum with a focus on opioid prevention
  - 2.3.2 Train students in Teen Mental Health First Aid
  - 2.3.3 Expand Youth MHFA training to include additional staff, parents, and community representatives
  - 2.3.4 FSU – understanding toxic stress
- 2.4 Expand capacity for evidence-based targeted and differentiated Tier 2 service provision

- 2.4.1 Hire school-based mental health staff
- 2.4.2 Expand number and types of interventions/programs
- 2.4.3 Provide PD to school MH staff on delivering differentiated Tier 2 services

3.1 Strengthen partnerships with community-based mental health and social service providers

- 3.1.1 Streamline and refine Tier 3 referral processes
- 3.1.2 Define cross-agency communication, collaboration, and follow-up processes

3.2 Enhance family engagement with school and community services.

- 3.2.1 Activities from FL PBS guide

	<b>Culturally Responsive RJP</b>	<b>Transformative SEL</b>	<b>Integrated Mental Health/Safety</b>
<b>Tier 1</b> (universal supports)	<ul style="list-style-type: none"> <li>• Proactive circles</li> <li>• Morning meeting</li> <li>• Morning message</li> <li>• Community circles</li> <li>• Listening conferences</li> </ul>	<ul style="list-style-type: none"> <li>• SEL Skills Development: e.g., persistence, belongingness, conflict resolution</li> <li>• SEL Programming: e.g., PATHS, Conscious Discipline, Responsive Classroom, Second Step, Sanford Harmony</li> <li>• Project-based learning</li> <li>• Bullying Prevention</li> </ul>	<ul style="list-style-type: none"> <li>• Universal screening</li> <li>• Substance abuse and violence prevention</li> <li>• fortifyFL suspicious activity reporting app</li> <li>• district threat assessment</li> </ul>
<b>Tier 2</b> (targeted supports)	<ul style="list-style-type: none"> <li>• Restorative circles</li> <li>• Conflict resolution</li> <li>• Peer mediation</li> <li>• Restitution</li> <li>• Community service</li> </ul>	<ul style="list-style-type: none"> <li>• Check in/Check Out</li> <li>• SEL/Social-Skills groups</li> </ul>	<ul style="list-style-type: none"> <li>• School-based Mental Health teams (MTSS and MTSS:B)</li> <li>• Small-group counseling</li> <li>• Substance Abuse Program</li> </ul>
<b>Tier 3</b> (intensive supports)	<ul style="list-style-type: none"> <li>• Family conferences</li> </ul>	<ul style="list-style-type: none"> <li>• Individual student mentoring</li> </ul>	<ul style="list-style-type: none"> <li>• Individual school-based counseling interventions: e.g., CBITS, SFBT</li> <li>• Community-based counseling referrals</li> <li>• Individual Student Safety Plans</li> </ul>

**Building Capacity for Implementing Evidence-based Practices**

<b>Evidence-based Practice</b>	<b>Ensuring Successful Implementation within MTSS framework</b>	<b>PD, Training, &amp; Technical Assistance</b>
<b>Culturally Responsive RJP</b>	<ul style="list-style-type: none"> <li>• Stakeholder engagement, buy-in</li> <li>• Development of RJP fidelity assessment tool, aligned with SAM</li> <li>• Integration of RJP into behavioral expectations</li> </ul>	<ul style="list-style-type: none"> <li>• Restorative justice PD (Rufus Lott)</li> <li>• Leading circles</li> <li>• Anti-bias and modern racism PD</li> <li>• Job-embedded coaching/mentoring</li> <li>• Regional PLCs</li> </ul>
<b>Transformative SEL</b>	<ul style="list-style-type: none"> <li>• Stakeholder engagement, buy-in</li> <li>• Selection of school-based SEL program appropriate for student needs</li> <li>• Development of SEL fidelity assessment tool, aligned with SAM</li> <li>• Integration of SEL into behavioral expectations</li> </ul>	<ul style="list-style-type: none"> <li>• Emotional Poverty training (online train-the-trainer model)</li> <li>• Culturally responsive teaching</li> <li>• Project-based learning</li> <li>• Bullying prevention training for teachers, school leaders, MH staff</li> <li>• Coaching (PLC &amp; one-on-one)</li> <li>• Regional PLCs</li> </ul>
<b>Integrated Mental Health/Safety</b>	<ul style="list-style-type: none"> <li>• Recruitment/selection of school-based and regional mental health staff</li> <li>• Selection of school-based substance abuse and violence prevention program appropriate for school needs</li> <li>• Development of strategies for responding to FortifyFL tips</li> <li>• Integration of MTSS and MTSS:B data</li> <li>• Threat assessment team</li> </ul>	<ul style="list-style-type: none"> <li>• BIMAS universal screener training</li> <li>• Substance abuse/violence prevention program PD</li> <li>• CBITS/SFBT Training for MH staff</li> <li>• Referral process training</li> <li>• MTSS/MTSS:B PLCs</li> </ul>

**Project Abstract**

Elevate Rural Florida Gadsden County School District (GCSD), in partnership with the Panhandle Area Educational Consortium – a consortium of small and rural LEAs – will implement Elevate Rural Florida, an evidence-based climate transformation initiative, in 16 high-need schools across six (6) rural LEAs in Florida’s Panhandle. Leveraging the consortia model, whereby small and rural LEAs are “better together,” GCSD will partner with Franklin, Jefferson, Liberty, Madison, and Taylor County School Districts to address Absolute Priority 1 (improving school climate), Absolute Priority 2 (LEAs that are rural), and three Competitive Preference Priorities (CPP 1, 2, and 3). Elevate will target high-need schools that serve 8,300 of the highest-need students in the state (i.e., 98% economically disadvantaged, 59% minority, and academically low-performing). Over the course of the five-year project period, Elevate will serve 700 instructional and leadership staff and impact the lives of over 13,000 K-12 students.

The project will integrate evidence-based solutions for implementing and enhancing MTSS with restorative, equity focused, and culturally responsive practices to achieve three primary goals: (1) Improve school climate through enhanced quality, fidelity, and consistency of MTSS implementation; (2) Reduce inequities, including racial, socio-economic, and other high-need student disparities in discipline and academic performance, through tiered implementation of culturally responsive evidence-based practices; and (3) Develop sustainability through family engagement and community partnerships. Project activities include: Providing staff with professional development (PD) and technical assistance in implementing MTSS with fidelity; Facilitating job-embedded PD, coaching, and regional Professional Learning Communities for implementing evidence-based practices, including restorative justice and social-emotional learning; Hiring regional, cross-district mental health specialists to support expanded school mental health, safety, and substance abuse prevention activities; integrating academic, behavioral, and social-emotional data for problem-solving and decision-making; and strengthening connections between schools, families, and community service agencies.

The project is designed to achieve the following intended outcomes: increased MTSS fidelity and consistency; increased student, educator, and family engagement; decreased disciplinary referrals, suspensions, and expulsions (including those related to drugs and alcohol); decreased rates of student substance abuse, depression, and anxiety; improved academic performance; decreased subgroup disparity in discipline and achievement; and improved school climate at the targeted high-need schools outlined below:

<b>LEA</b>	<b>School</b>	<b>Location</b>	<b>Total Students</b>	<b>% Free/Reduced Lunch</b>
Franklin	Franklin Co. School	Eastpoint, FL 32328	865	100%
Gadsden	Gadsden County High School	27001 Blue Star Hwy. Havana, FL 32333	977	
Gadsden	West Gadsden Middle School	200 Providence Rd. Quincy, FL 32351	387	100%
Gadsden	James A. Shanks Middle School	1400 W. King St. Quincy, FL 32351	677	100%
Jefferson	Jefferson Co. Middle Somerset Charter School	50 David Rd. Monticello, FL 32344	172	87.7%
Jefferson	Jefferson County High Somerset Charter School	50 David Rd. Monticello, FL 32344	180	79.5%
Jefferson	Jefferson Co. Elementary Somerset Charter School	50 David Rd. Monticello, FL 32344	417	76.4%
Liberty	Liberty Co. High School	12592 NW Myers Ann St. Bristol, FL 32321	340	100%
Liberty	W. R. Tolar K-8 School	14745 Hwy. 12 S. Bristol, FL 32321	495	100%
Liberty	Hosford Elementary Jr. High School	16827 FL-65, Hosford, FL 32334	359	97.2%
Madison	Madison Co. High	2649 US-90, Madison, FL	124	94.8%

	School	32340		
Madison	Madison Co. Central School	2649 US-90, Madison, FL 32340	510	100%
Madison	Greenville Elementary School	729 Southwest Overstreet Ave., Greenville, FL 32331	996	100%
Taylor	Taylor Co. Middle School	601 E. Lafayette St., Perry, FL. 32347	559	100%
Taylor	Taylor Co. Elementary	1600 E. Green St. Perry, FL 32347	578	100%
Taylor	Taylor Co. High School	900 N. Johnson Stripling Rd., Perry, FL 32347	711	100%

### **Project Expected Outcomes**

- Higher student engagement
- Higher educator engagement
- Higher family engagement
- Lower disruptive behavior
- Lower substance abuse, depression, anxiety
- Lower subgroup disparity
- Better school climate
- Improved academic performance
  - More accuracy of reporting and identification
  - More integration of behavior and academics
  - Better consistency of MTSS implementation
  - Better student social-emotional skills
  - Better awareness of student mental health issues
  - Better school-based service utilization
  - Better community-based service utilization
  - Better family awareness of community mental health programs

All required program reporting will be done by PAEC on behalf of the FISCAL AGENT:

See attached Grant Award Notification Reporting Requirements from USDE that includes Grant Terms and Conditions for Financial and Performance Reports. Reports include a final performance report within 90 days of grant termination; annual grant performance reports; quarterly, semi-annually, and annually financial reports and final financial reports.

PAEC agrees to do all performance reporting for the grant during its life using the G-5 reporting system.

FISCAL AGENT agrees to do all financial reporting for the grant during its life.

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

AGENDA ITEM NO. 8e

DATE OF SCHOOL BOARD MEETING: March 24, 2020

TITLE OF AGENDA ITEM: Approval of the 2019-2023 GESPA Contract.

DIVISION:

       This is a CONTINUATION of a current project, grant, etc.

PURPOSE AND SUMMARY OF ITEM:

Approval of the Collective Bargaining Contract 2019-2023 between The School Board of Gadsden County and Gadsden Educational Staff Professional Association is requested.

The Contract was ratified by GESPA with a vote of 233 for ratification and 2 against ratification.

FUND SOURCE: N/A

AMOUNT: N/A

PREPARED BY: Rocky Pace 

POSITION: Chief Negotiator

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INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER

       Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered \_\_\_\_\_

CHAIRMAN'S SIGNATURE: page(s) numbered \_\_\_\_\_

REVIEWED BY: \_\_\_\_\_

**COLLECTIVE BARGAINING**

**BETWEEN**

**The School Board of  
Gadsden County**

**And**

**Gadsden Educational Staff  
Professional Association**

**2019-2023 School Year**

Board Approved 00/00/0000

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## **ARTICLE I RECOGNITION**

- A. The Board hereby recognizes the GESPA as the exclusive collective bargaining representative for a unit of non-instructional employees of The School Board of Gadsden County I Florida described as follows:
1. INCLUDED: All full-time and regular part-time non-instructional employees of the Gadsden County School District in the following positions: Maintenance Worker, Custodian, Custodial Assistant, Food Service Worker, Bus Driver, Bus Attendant, Educational Paraprofessional, Assistant Secretary, Clerical Worker, District Receptionist, Warehouse Supervisor's Secretary, Assistant Food Service Manager, and District Secretaries not designated as confidential.
  2. EXCLUDED: Director of Transportation; Director of Facilities; Supervisor of School Food Service; Food Service Manager; Vehicle Service Supervisor; District Finance Account Clerk; Administrative Assistants; Warehouse Supervisor; Office Managers; District Executive Secretaries to Superintendent, Deputy Superintendent, Assistant Superintendents, and Director of Instruction, Coordinators of Instructional Materials, School Food Service and Personnel; and all other full-time and regular part-time District employees not listed as included in the bargaining unit.
- B. Whenever used herein, the term "employee" shall mean any employee who is included in the forgoing appropriate unit.

## **ARTICLE II NEGOTIATION PROCEDURE**

- A. In negotiating this Agreement, neither party shall have control over the selection of the representatives of the other party. However, the number of representatives per team shall not exceed five (5). Throughout negotiations, the chief negotiators shall sign all tentative agreements. There shall be six (6) signed copies of the final agreement. Four (4) copies shall be retained by the Board and two (2) copies retained by the Union.
- B. Following tentative agreement of the contract, the Board agrees to print a maximum of three (3) draft copies per work site for GESPA to distribute to its bargaining unit members for the purpose of ratification. The cost of printing shall be at the expense of the Board.
- C. Negotiation sessions not involving third party neutrals shall begin at a mutually agreed upon time. When it is necessary for a negotiation session to take place during normal working hours, only the members of the bargaining team shall be granted leave-in-line-of-duty. Such leave may include time for travel from the member's work site to the session site.
- D. Primary access to this Contract shall be through an electronic version that shall be available on the District and Association websites. A limited number of copies shall be printed at the expense of the Board within sixty (60) days after ratification for new employees and for administrative purposes. The Board also shall furnish fifty (50) copies to GESPA for its use.

## ARTICLE III GRIEVANCE PROCEDURE

### A. Definitions.

1. "Grievance" shall be defined as a dispute involving the interpretation, application, or violation of a provision(s) of this contract.
2. "Grievant" shall mean any employee or group of employees who have filed a grievance.
3. "Day" shall mean a district workday based on the calendar approved by the Board the application of this provision shall not, however, result in the extension of a time period stated in this Article for more than ten (10) days.
4. Grievance Forms. Each grievance, request for review, and notice of arbitration must be submitted in writing on the appropriate grievance form and signed by the grievant(s). All grievance forms shall be dated when received. The grievance forms may be filed in person or by means of FAX, U.S. mail, or other recognized means of delivery.

### B. Informal Resolution. When employees have a problem or complaint, they should attempt to resolve it through discussions with their supervisor or other appropriate personnel. If the problem or complaint cannot be resolved in that manner, the grievance procedure is provided as a formal means for resolving the grievances of employees as defined below. An effort to resolve a problem or complaint under this provision does not waive the time limits for filing a grievance at Step 1 as provided in Section E.3, below.

### C. Resort to Other Procedures.

1. It is the intent of the parties to first provide a reasonable opportunity for resolution of a matter that constitutes a grievance through the grievance procedure. If prior to seeking resolution of a dispute by filing a grievance hereunder, or while a grievance is being processed, an employee formally initiates resolution of the matter in any other forum, whether administrative or judicial, the Board shall have no obligation to proceed further with the matter pursuant to this grievance procedure.
2. As an exception of the provisions of paragraph A., above, a grievant may file an EEOC charge while the grievance is in progress when such filing becomes necessary to meet federal filing deadlines pursuant to 42 U.S.C. s. 2000e et seq. Furthermore, an employee may seek resolution of a dispute through site or school procedures prior to filing a grievance and may request of the site administrator, an extension of the time limits for initial filing of the grievance for this purpose.

### D. Representation and Appearances.

1. An employee shall choose at Step 1 and Step 2 whether to be represented by GESPA or to represent him/herself. GESPA shall not be required to process grievances for employees who are not members of the Association.
2. The resolution of any grievance as defined herein shall not be inconsistent with the provisions of this contract, and the grievant shall have the opportunity to have GESPA present at any meeting involving the grievant called to discuss such a resolution.
3. Time spent by grievant and GESPA representatives investigating and processing grievances outside regular working hours shall not be counted as time worked.

### E. Formal Grievance Procedure.

1. If the parties are unable or unwilling to resolve a grievable concern or problem through the informal process described in Section A, 1 above, a formal grievance may be filed under this Section.
2. Time Limits.
  - i. The time limits provided in the Article shall be observed, but may be extended by written agreement of the parties. Whenever illness or other incapacity of a party

necessary to hear the grievance prevents his/her presence at a grievance meeting, the time limits shall be extended, by mutual consent, to such time that the party can be present. In the event a grievance is filed after May 15 of any year and strict adherence to the time limits may result in hardship to any party, the Board shall use its best efforts to process such grievance prior to the end of the school term or as soon thereafter as possible.

- ii. Upon failure of any administrator to provide a decision at any step, within the time limits provided in this Article, the grievant may proceed to the next step. Upon failure of the grievant to file at the next step within the time limits provided, the grievance shall be deemed to have been resolved by the decision at the prior step.
- iii. Upon written agreement of the parties, any step in this procedure may be waived.
- iv. A grievant may withdraw his/her grievance at any step but that same grievance may not be filed a second time unless it is of a continuous nature.

#### STEP I

3. A grievance shall be filed with the employee's site administrator within twenty (20) days following the occurrence of the alleged violation of the contract if the informal resolution process is used, or ten (10) days if the informal resolution process is not used. The grievance shall state the facts giving rise to the alleged violation, the specific section(s) of the contract alleged to have been violated, the employee's contention with respect to these provisions, and the specific relief sought, and shall be signed by the grievant. Within twenty (20) days after receiving the grievance, the site administrator shall meet with the grievant and representative, if representation is being used, and communicate his/her decision in writing to the grievant and the grievant's representative or otherwise resolve the grievance.

#### STEP II

4. If the grievant is not satisfied with the decision at Step I, he/she may, within ten (10) days following receipt of the Step I decision or following the date on which the Step I decision was due if no decision is provided, file a request for review of the Step I decision with the Superintendent's designee on the appropriate form. The Superintendent's designee shall, upon request, meet with the grievant and/or representative and may conduct whatever investigation is necessary to make a finding. Within twenty (20) days of the receipt of the grievance at Step 2, the Superintendent's designee shall communicate his/her Step 2 written decision to the grievant and/or representative or otherwise resolve the grievance.

#### STEP III

5. If the aggrieved is not satisfied with the disposition at Step II he/she may, within ten (10) days after the answer at Step II, appeal in writing on the proper form the original grievance to the Superintendent. The Superintendent may conduct whatever investigation is necessary to make a finding. Within twenty (20) days after the receipt of the grievance, the Superintendent shall notify the grievant as to His/her disposition of the grievance.

#### STEP IV

6. Mediation. The parties may, by written agreement, submit a grievance to mediation to be conducted by the Federal Mediation and Conciliation Service (FMCS), prior to being submitted to arbitration. When the parties agree to mediate an issue, the time limits to file for arbitration shall automatically be extended for the period necessary to conclude the mediation process.

#### STEP V

7. Arbitration
  - i. If the grievance has not been satisfactorily resolved at Step III, GESPA may, within ten (10) days following receipt of the Step III decision or following the date on

- which the Step III decision was due if no decision is provided, file an intent to submit the grievance to arbitration with the superintendent or his/her designee.
- ii. A grievance filed at Step III on which no action has been taken by the grievant for twenty (20) days shall be deemed withdrawn and resolved in accordance with the decision issued at the prior step.
  - iii. Disclosure of Information. Neither the Board nor the grievant shall be permitted to assert in an arbitration preceding any grounds or rely on any evidence that has not previously been disclosed to the other party.
  - iv. Selection of Arbitrator. The parties shall follow the American Arbitration Association procedure for selection of an arbitrator and shall conduct the arbitration under its rules and procedures except as modified by the provisions of this Contract. The arbitration shall be scheduled within sixty (60) days following selection of the arbitrator.
  - v. Authority of the Arbitrator.
    - a. The arbitrator shall have no power to alter, add to, or subtract from the terms of this contract. Arbitration shall be confined to the application and interpretation of this Contract and the precise issue(s) submitted for arbitration. The arbitrator shall refrain from issuing statements of opinion or conclusions not essential to the determination of the issues submitted.
    - b. In rendering decisions, an arbitrator shall give due regard to the responsibilities of the Board and the Superintendent and their designees as provided in law and rule and shall so construe such responsibilities, except as they may be specifically conditioned by this Contract.
    - c. The arbitrator's decision shall be final and binding on the parties as provided in Section 447.401, Florida Statutes, provided that either party may ask that an appropriate court vacate such a decision on one or more of the grounds stated in Section 682.13, Florida Statutes.
    - d. An arbitrator's award may be retroactive as the equities of a case may demand, but an award shall not be retroactive to a date earlier than sixty (60) days prior to the date the
    - e. grievance was initially filed except for those provisions of State or federal law that may require an earlier date.
  - vi. Fees and Expenses. The losing party shall pay the fees and expenses of the arbitrator. A party desiring a transcript of the arbitration proceedings shall provide written notice to the other party at least five (5) days prior to the date of the arbitration and shall be responsible for scheduling a stenotype reporter to record the proceedings and for paying the appearance fee of the reporter and the cost of obtaining an original transcript. The party shall also provide a photocopy of the transcript to the other party upon written request and payment of reasonable copying expenses.
8. Processing.
    - i. The site administrator shall refuse consideration of a grievance not filed or processed in accordance with this Article.
    - ii. If a grievance arises as the result of a condition that the immediate supervisor is without jurisdiction to resolve, the grievance shall be filed at Step II after discussing such filing with the Superintendent's designee.
  9. Precedent – No complaint informally resolved, or grievance resolved at either Step I or II, shall constitute a precedent for any purpose unless agreed to in writing by the Board and GESPA.
- F. Documents. The grievant or representative shall be provided, upon request and with reasonable copying charge, with a copy of any identifiable document relevant to the grievance. All written materials dealing with the processing of a grievance shall be filed separately from the grievant's personnel file except an arbitration decision or a settlement agreement that requires personnel action(s) that affects the grievant.

- G. Notwithstanding the expiration of this contract, any claim or grievance arising while it was in effect may be processed through the grievance procedure until resolution, provided it is timely filed.
- H. Hearings and conferences under this procedure shall be conducted at a time and place which will afford a fair and reasonable opportunity for all persons, including witnesses, entitled to be present, to attend, and will be held, insofar as possible, after regular school hours, or during working time of personnel involved. When such hearings and conferences are held, at the option of the administration, during school working hours, all employees whose presence is required shall be excused, with pay, for that purpose.
- I. Adjustment of any grievance as described herein shall not be inconsistent with the provisions of this Agreement.

## ARTICLE IV ASSOCIATION RIGHTS AND RESPONSIBILITIES

### A. Use of facilities

GESPA and its representative shall have the right to use the Board's work sites and equipment in accordance with the applicable provisions of Gadsden County School Board Policy 9.30 entitled Use of Facilities. When fees are required, they will be assessed to GESPA for payment based on the fee schedule recommended by the Superintendent and approved by the School Board of Gadsden County.

### B. Communication to Employees

1. Bulletin Boards. GESPA shall have the right to post notification of activities and matters of GESPA concern on a designated bulletin board at each work site. The designated bulletin board will be established by mutual agreement of the site administrator and the president of GESPA.
2. GESPA shall have the right to use any intra-school communications system, the inter-school mail and e-mail systems (based on server availability), and mailbox distribution system. Distribution of materials shall be in compliance with procedures agreed upon by the site administrator and GESPA and the rules and policies of the Board. These communication systems shall not be used to transmit or display materials if the content of which relates to election campaigns for public office. In the event that the Board must collect postage for GESPA's use of the district inter-mail system, GESPA will be responsible for the payment of all such postage and cooperatively work out procedures for such payment.

### C. Information Provided to GESPA

1. Reports Provided to GESPA: The board shall provide GESPA without charge, during the weeks of September 1 and February 1 of each year a list of employees including the following information: name, classification, pay grade, hourly rate of pay, work site, home address, work phone number, and district hire date.
2. GESPA Access to District Policies and Rules: GESPA shall have access to District policies and rules and Board agendas and shall be notified of changes of such policies and rules when site administrators and other District Administrators are notified of such changes and at least five (5) days prior to the implementation, if feasible. The site administrator shall provide the site representative with one (1) copy of any district policy or rule requested by the site representative.

D. Upon appropriate authorization by any employee, the board will directly deposit the employee's monthly salary into any official financial institution that provides a bank routing number. In addition, the board will directly deposit a part or all of the employee's salary into the Envision Credit Union.

E. The Board shall deduct from the pay of each employee all current membership dues and uniform assessments of the GESPA, provided that at the time of each such deduction there is in the possession of the Board a valid signed membership form provided by GESPA for each such deduction, executed by the employee, in the form and according to the terms of the membership form. Membership shall continue year after year unless revoked by the employee. Authorization for dues revocation is revocable upon written request by the employee on the Employee Association Dues Revocation Form. The employee must first secure the written acknowledgement of GESPA on the Form, signed and dated, and then submit the form to the District Payroll Office. The revocation of the authorization for dues deduction will be effective at the beginning of the pay period no fewer than 30 calendar days from the date of the employee's submission of the completed Dues Revocation Form to the Payroll Office.

1. Any employee may authorize dues deduction by presenting to the Board on or before September 10 of the applicable school year a signed membership form authorizing the Board to

deduct from the employee's salary an amount certified in writing by the GESPA to the Board, on or before September 1 of the applicable school year, as being due to the GESPA from each member thereof as membership dues for that fiscal year, which amount shall be evenly divisible by ten (10) and deducted monthly beginning with the September pay check and continuing consecutively until ten (10) deductions have been made presenting said membership form to the Board after September 10 and at the time during the applicable school year, in which case the total amount to be deducted shall be a fraction of the annual dues based on the number of checks still to be issued in that year, beginning with the first check issued at least fifteen (15) calendar days after the Board's receipt of the employee's completed membership form. Sums so deducted from the employee's remaining salary checks shall be as nearly equal in amount as practicable. Provided, however that any employee whose employment begins after September 10 of the applicable school year may apply for such dues deduction, if the appropriate completed membership form is received by the Board not later than thirty (30) days after the beginning of the employee's employment by the Board. All such deductions and remittances by the school board shall be made in accordance with stipulations established by the Board or the Superintendent of Schools and remitted to the Big Bend Service Unit.

2. The District will provide GESPA with two payroll deduction slots for the purpose of deducting premiums (after tax) for companies participating in the benefits programs sponsored by GESPA through the NEA Member Benefits Program. All deductions shall be made on a twelve month basis using a mutually agreeable form to be provided by GESPA and transmitted to the common remitter selected by GESPA or its affiliates for such purpose as a single check amount to the remitter each payroll period. GESPA will hold the Board harmless for any claims arising out of the use of these payroll deduction slots. These deductions shall not be limited or restricted to any certain number of participants by the Board.
3. The GESPA shall indemnify and save harmless the board and its employees from any and all claims, demands, suits, judgments, awards and costs incurred in connection with any such claim, demand, or suit resulting from any action taken or omitted by the Board or its employees for the purpose of complying with the provisions of the Article.

F. The Board also agrees to furnish to the union in response to reasonable requests all available information concerning names, addresses, seniority and experience credit of all bargaining unit members; compensation paid thereto; agencies, minutes, and reports of all open Board meetings; census and membership data; and such other information as will assist the Union in developing intelligent, accurate, informed and constructive programs or proposals on behalf of employees together with information which the Union may require to process any grievance or complaint.

G. Representatives of the Board and GESPA will meet upon the written request of either party during the term of the contract at a time convenient for both parties for the purpose of reviewing the administration of this contract and to resolve problems that may arise. These meetings are not intended to bypass the negotiations or grievance procedures.

H. In Line of Duty-for GESPA Activities

1. Work Responsibilities and In Line of Duty for the GESPA President.
  - i. It is the joint responsibility of the President, GESPA, and the District to limit the impact of the President's responsibilities and accompanying In-Line-of Duty on the President's work site through the following measures:
    - a. Work interruptions for GESPA business shall be minimized through the use of E-mail, voice mail, answering machine, call forwarding, where available.





- K. During the regular workday, the Executive Director of Big Bend Service Unit or the staff of the Florida Education Association and/or the president of GESPA may visit bargaining unit employees at the site, provided the authorized representatives report their presence to the site administrator or his/her designee and they do not interfere with, nor disturb, normal site operations or cause the loss of instructional time. No authorized representative shall use this privilege except to conduct GESPA business.

## ARTICLE V

### EMPLOYEE RIGHTS, PROTECTION AND RESPONSIBILITIES

- A. Pursuant to the Florida Public Employees – Collective Bargaining Act, as amended, *Florida Statutes* 447.01 et seq., the Board hereby agrees that every employee shall have the right to freely join and participate in any employee organization of his/her own choosing and to negotiate collectively, through a certified bargaining agent, with his/her public employer in the determination of the wages, hours, terms and conditions of his/her employment, and to engage in concerted activities not prohibited by law and/or school board policy, for the purpose of collective bargaining. While the Board understands and agrees that it will not interfere with, restrain, or coerce employees in the exercise of any rights conferred by *Florida Statute* 447 or encourage or discourage membership in any employee organization, or refuse to bargain collectively, fail to bargain in good faith, or take action against any employee because he/she has filed charges or given testimony under *Florida Statute* 447, the Board reserves the right to communicate with its employees as it deems necessary and appropriate.
- B. The employee, upon written request, shall have the right to review and reproduce the contents of the personnel file, being accompanied by a representative of the GESPA, if desired, and in the presence of the administrator responsible for the safekeeping of such file.
- C. Unless otherwise provided by Florida Statute 1012.31, the personnel file of each employee shall be open to inspection only by the School board, the Superintendent, the supervisor, the employee and such other person(s) the employee or the Superintendent may authorize in writing.
- D. No derogatory material shall be placed in an employee's personnel file that the employee has not had the opportunity to see. An employee shall sign any reviewed material. However, such signing does not indicate agreement but rather that the employee has seen the material. In the event an employee does not review and sign such material within five (5) working days after notification of the existence of such material, the material shall be filed in the personnel file.
- E. Any case of assault on an employee shall be promptly reported to the principal or his designated representative. The Board agrees to advise the employee of his/her rights and obligations with respect to such assault and shall render all reasonable assistance to the employee in connection with the handling of the incident with law enforcement and judicial authorities.
1. All employees are entitled to a safe place to work. When an unsafe condition exists where continued work could result in injury to the employee or other employees, the unsafe condition shall be reported immediately to the supervisor. The supervisor shall take whatever action necessary to correct the condition. Should correction not occur to remedy the condition, the employee shall report the condition to the Superintendent/designee. This does not waive the right of an employee to grieve.
- Employees hired to assist with students with special behavioral problems will be made aware of the personal risk. The involvement of law enforcement will be at the discretion of the building administrator.
- F. The School Board shall have the right to take disciplinary action against its employees for just cause. Just cause shall be defined to mean:
1. Prior to taking official action, the board or its designee made an effort to determine if the employee violated or disobeyed a rule or order of management.
  2. The Board or its designees conducted an investigation to determine the facts.
  3. The Board applied its rule and penalties uniformly and without discrimination to all employees.
  4. The employee was given an opportunity to present her/his side prior to official action being taken.
  5. The Board's rule or order that the employee is alleged to have violated was not arbitrary, capricious or discriminatory.
  6. The Board gave the employee forewarning of the consequences or possible consequences if the employee did not obey the rule or order.
  7. When determining the degree of discipline, consideration will be given to the employee's service record and the nature of the offense.

- G. Each employee who resides in the district and is employed at least half time, or who resides outside the district and is employed full time shall have the opportunity to enroll his or her child(ren) in the school of choice, subject to Gadsden County School Board Policy 5.20 entitled Student Assignment. In no instance will the child(ren) interfere with the performance of the employees' assigned duties.
- H. Nothing contained within this Contract shall be construed to deny or restrict any employee's rights that he/she may have under Florida School Laws or other applicable State or Federal laws or regulations. The rights granted to employees hereunder shall be deemed to be in addition to those provided elsewhere.
- I. The employee shall be entitled to full rights of citizenship, and no religious or political activities of any employee or lack thereof, shall be grounds for any discipline or discrimination with respect to the employment of such employees. The private and personal life of any employee is not within the appropriate concern or attention of the Board unless it interferes with the performance of his or her prescribed duties.
- J. The Board agrees that it will in no way discriminate against any employee covered by this Contract because of their race, creed, religion, color, national origin or ancestry, age, sex, marital status, sexual orientation, physical characteristics or disability.
- K. The Board will repair or reimburse employees the current value of any clothing or other personal property damaged or destroyed as a result of battery upon the employee suffered in the course of his/her assigned duties, unless such loss is covered by insurance or reimbursement obtained from other sources. Written requests for reimbursement may be submitted to the employee's immediate supervisor. Such requests shall be governed by procedures developed by the Board.
- L. Each work site shall, when feasible, notify employees of emergency phone calls immediately upon their receipt, and make reasonable efforts to place other phone messages in an employee's mailbox within thirty (30) minutes of their receipt.
- M. The Board shall include in the District Master Plan for Staff Development components for non-instructional employees designed to improve the competencies of employees. A staff development committee shall be established consisting of representatives of each class of employees. The committee shall elect its own chairperson and shall consider the inservice needs of all non-instructional employees and make recommendations to the Professional Development Coordinator for inclusion in the Master Staff Development Plan.

## ARTICLE VI LEAVE

Each employee must, for any absence from his/her work, secure official permission in advance, and no action purporting to grant leave retroactively shall be recognized. Leave for sickness or other emergency which was verbally approved in advance may be deemed to have been granted in advance if the employee makes to his/her principal or other immediate supervisor, at the earliest practicable time on the first day that he/she returns to work after such absence, a proper written report and explanation of the absence.

### A. Sick Leave

1. Each member of the non-instructional staff employed on a full-time basis shall be credited with four (4) days of sick leave at the end of the first month of employment and shall thereafter be credited with one additional day of sick leave at the end of each month of service.
2. Sick leave may be taken by any non-instructional employee who is unable to perform his/her duties as such because of his/her own illness, or because of the illness or death of his/her father, mother, brother, sister, husband, wife, child or other close relative, or member of his/her own household, and who consequently has to be absent from his/her work.
3. Sick leave may not be used prior to the time it is earned and credited to the employee.
4. The employee shall be entitled to earn no more than one day of sick leave times the number of months of employment during each year of employment.
5. Sick leave shall be taken only when necessary because of sickness as herein prescribed.
6. A member of the non-instructional staff may transfer sick leave earned as an employee with another Florida school district.
7. Sick leave shall be cumulative from year to year, without limitation on the number of days of sick leave that may accrue to an employee: and provided, further, that at least one-half of such cumulative leave must be earned with this school district.
8. In case of reasonable doubt as to the validity of any sick leave claim, the Superintendent may require a supporting certificate of illness from a licensed physician.
9. Sick Leave Transfer to a Family Member. An employee may transfer earned sick leave to a spouse, sister, brother, parent, child or any designated person who is employed by the District under the provisions of District Policy and related procedures.

### B. Personal Leave

Personal leave up to a maximum of six (6) days per fiscal year, with compensation, may be granted by the Superintendent, provided that the use of such leave shall be charged to the individual's currently accrued sick leave, and provided further that such personal leave shall be non-cumulative.

### C. Illness-In-Line-Of-Duty-Leave

Any full-time employee shall be entitled to illness-in-line-of-duty leave when she/he has to be absent from her/his duties because of illness from any contagious or infectious disease contracted therein. Any employee requesting such leave shall provide proof, when so requested, that illness was contracted while discharging her/his duties as such employee. Such leave may be authorized for a total of not over ten (10) days during any fiscal year, subject to the provisions of Section 1012.63, F.S.

Where the amount of compensation payable hereunder for injuries, accidents or other disabilities which would entitle the employee to compensation under the provisions of the Florida Worker's Compensation Law, exceeds the amounts payable under said compensation law, payments hereunder shall be made for the difference between the amount paid under said Florida Workers' Compensation Law and the amount otherwise due under the provisions of this section.

### D. In-Line-Of Duty

1. Any person who is sponsoring or participating in a school-sponsored activity;
2. Any person who is sent to an out-of-county meeting by the Superintendent or another

- authorized county official, to represent Gadsden District; and
3. Any person who is loaned to another county for special assignment such as evaluations and plant surveys.
  4. Any GESPA member, who is an elected voting delegate to the Annual FEA Delegate Assembly, shall be assigned In-Line-of Duty for the purpose of attending this meeting. Names of voting delegates shall be submitted to the Deputy Superintendent or his designee annually by the GESPA president in order to secure leave for this purpose.

E. Leave for Jury Duty and/or Court Processes

For court appearances or duty performed, pursuant to court process, by an employee during school work hours, the employee shall receive from the Board full pay, allowances and/or reimbursements as follows:

1. When summoned to appear as a juror, or as a witness (except as a character witness) in any civil or criminal action in which the employee is neither plaintiff nor defendant: full pay, without allowances or reimbursements, with the employee retaining any payments or fees received from the court or other third parties for such appearance; but,
2. When summoned to appear as a defendant or as a witness in any action arising out of and in the course of her/his employment by the Board: full pay, allowances and/or reimbursements as though on "leave in line of duty" with any payments or fees received from the court or other third parties for such appearances to be endorsed to the Board.

F. Military Leave

Military leave shall be granted as required by law or Florida State Board of Education Rules, and may be granted as thereby permitted.

Military Caregiver and Qualifying Contingency Leave. An employee who is a caregiver of a relative who suffers serious injury or illness during active military duty, or who has a qualifying exigency as a result of a family member being on active duty in the National Guard or Reserves in support of a contingency operation, may qualify for category of FMLA leave as described in District Policy.

G. Parental Leave

Any employee or her/his spouse may be granted leave without pay, not to exceed one year in duration, incident to the birth or adoption of a child.

The application for such leave must be accompanied by a licensed physician's certificate attesting to the pregnancy of the applicant or the spouse of the applicant, the probable term thereof and the recommended period of confinement, or, in the case of adoption, by satisfactory evidence of the date custody of the child shall be delivered to the applicant.

Upon the filing of an application for parental leave, the employee and the principal shall, subject to the approval of the Superintendent and the Board, mutually determine the commencement date for such leave, based on evaluation of the capacity of the prospective mother to discharge her duties and/or the expected date of birth of the child or receipt of custody of the child to be adopted, as the case may be, and the leave shall continue for the remainder of the school year unless otherwise requested by the employee and approved by the Board.

H. Outside Employment

Employees who are on Board approved leave of absence shall not accept employment elsewhere unless written approval is granted in advance by the Superintendent of Schools. Acceptance of other employment without such approval shall cancel the leave and may subject the employee to disciplinary action.

I. Vacation Leave: lump sum payment for accrued vacation leave.

1. All personnel employed full-time on a twelve-month basis will be allowed in each fiscal year vacation leave which may be taken at any time during the year as approved by the Superintendent; and in amounts as follows:

- i. During the first ten (10) years of the employee's full-time service for this School District, twelve (12) days per fiscal year. Such vacation leave may be cumulative up to a maximum of twenty (20) days.
  - ii. During and after the eleventh (11th) year of the employee's full-time service for this School District, eighteen (18) days per fiscal year. Such vacation leave, taken together with vacation leave accumulated in previous years, may be cumulative up to a maximum as defined by Florida Statute.
2. Subject to law and applicable rules and regulations, a lump-sum payment for any accrued vacation leave will be made to each employee upon termination of employment or upon retirement, or to employee's beneficiary if service is terminated by death. The amount of such lump-sum payment will be computed by multiplying the daily rate of pay of the employee at the time of such termination, retirement or death by the number of accrued vacation leave days which the employee has at that time, up to a maximum as defined by Florida Statute. In such computation, accrued vacation leave days may be counted whether earned before or after the effective date of this rule.

J. Abandonment of Position

Except in case of extreme emergency (sudden incapacitation, sudden illness, or accident which prevents prior approval for absence), if an UNREPORTED ABSENCE is for three (3) consecutive workdays, the School Board, upon the recommendation of the School Administrator and Superintendent, may consider the employee to have abandoned the position and resigned from the School District.

K. Employees Voluntary Sick Leave Bank

1. Membership - Any full-time employee, having been employed by the School Board for at least one (1) year and having at least five (5) days accrued sick leave at the end of the preceding year, may enroll in the Sick Leave Bank by voluntarily contributing one (1) sick leave day to the bank between August 15 and September 15 of any fiscal year. An eligible employee is defined as a person employed in a non-instructional position designated by the School Board as full time. A participating employee shall contribute one (1) sick leave day at the time of enrollment and one (1) additional day each employment year thereafter. Should the Bank need replenishment, an additional day may be assessed of persons desiring to continue participation, with two (2) days maximum contribution per year. An exception to the two (2) day maximum shall be considered in the case where a participating employee is suffering a medical hardship. In this case, employees may contribute additional days over the maximum amount.  
A day is defined as the number of hours of work per day shown in the GESPA Agreement.
2. Establishment and Duration - The Sick Leave Bank will not come into existence until at least 150 sick leave days have been contributed and will remain in existence until termination by the Board or it is discontinued because of depletion of sick leave days.
3. Sick Leave Bank Committee - The Sick Leave Bank Committee shall be composed of two (2) employees, two (2) members appointed by the Superintendent and the following ex-officio members: GESPA President and one (1) School Board member. The Committee shall determine how many days, if any, an employee may receive from the Sick Leave Bank. The Committee will develop routine procedures for considering applications for use of the Sick Leave Bank including, but not limited to:
  - i. provision of standard forms for participating in or withdrawal from the Bank by an employee;
  - ii. provision for medical documentation of need;
  - iii. provision for monitoring eligibility of an employee;
  - iv. provision for monitoring of days in the Bank and determination of when a replenishing of the Bank may be needed;
  - v. provision for investigation of possible abuse of the Bank;
  - vi. and provision for furnishing the parties with status reports on the condition of the Bank on an annual basis.
4. Changes in Procedures -- Changes in procedures for administration of the Sick Leave Bank will

- be subject to approval of the Association and the Board's representative.
5. Participation -- Participation in the Sick Leave Bank is voluntary.
  6. Utilization of Days -- Use of days from the Bank will be subject to the following conditions:
    - i. The claim must be based on a personal and catastrophic illness, injury, or accident.
    - ii. Prior to eligibility, an employee must exhaust all accumulated sick leave and other types of leave granted by the Board related to the accident, illness, or injury.
    - iii. An employee may not utilize more than sixty (60) days from the Bank without reapplication to the Committee for a further draw on the Bank. Such reapplication will be subject to all conditions which would apply to an original application.
    - iv. The salary of an employee participating in the Sick Leave Bank will be reduced by any benefits drawn from Worker's Compensation.
    - v. An employee otherwise eligible for full disability retirement will not continue to utilize the Sick Leave Bank.
  7. Abuse -- Allegations of abuse of the Sick Leave Bank will be investigated by the Committee which will submit a report of its investigation to the Board and the Association including a recommendation for appropriate action, if any. The School Board will consider the report and recommendation prior to taking such action on the matter as it deems proper.

L. Unpaid Leave

Personal leave is that leave granted for non-work related reasons and does not entitle an employee to pay except as is provided in Article IV.

M. Policies and Procedures Governing Unpaid Leave

1. Unpaid Leaves of Ten (10) Days or Less. The immediate supervisor and Superintendent must approve a request for personal leave of ten (10) days or less before it is taken.
2. Unpaid Leaves of More Than Ten (10) Days.
  - i. An unpaid leave of absence for more than ten (10) days may be granted at the discretion of the School Board, upon affirmative recommendation of the Superintendent, provided that a qualified replacement is available. Except under compelling circumstances, such leave shall not be granted to probationary employees.
  - ii. Application for such leave must be made at least thirty (30) days prior to its commencement and shall include information regarding the purpose and length of the leave. In the interest of continuity in the instructional program, such leaves shall normally be taken in semester increments.
  - iii. Leave granted under this section shall be limited to two (2) years within a five-year period with the following exception:
 

An employee who wishes to serve in public office may request an exception of the two (2) year unpaid leave limitation in accordance with the provisions of this section.
  - iv. Reasons for such leave shall include personal health problems, including rehabilitation and regeneration. Employees may accept gainful employment during such leave to include, but not be limited to, Peace Corps, religious reasons, VISTA, and work with other government agencies.
  - v. An employee granted a leave under this section shall notify the site administrator in writing of his/her intent to return or seek additional leave as follows:
    - a. For leaves granted for the first semester, thirty (30) work days prior to the end of the semester; or
    - b. For leaves granted for the second semester or one school year, no later than March 1
3. Benefits During Unpaid Leave
  - i. Any employee granted a leave of absence as provided in this article shall be given the opportunity, unless otherwise provided, to continue insurance coverage in existing District programs during the leave, provided the entire premiums (Board and employee contribution) for such insurance programs shall be paid by the employee on a monthly



- basis in advance of the month due.
    - ii. To the extent permitted by the Florida Retirement System, employees shall be given the opportunity to continue retirement programs, provided the employee pays the full cost of such programs. Forms are available from the Florida Retirement System for the employee to purchase such leave time.
  - 4. Family Medical Leave - Employees requesting unpaid leave for serious personal or family illness are entitled to continued Board contributions to insurance programs as provided for in the Family Medical Leave Act. Employees wishing to receive this benefit must identify their leave request as a "Family Medical Leave" prior to taking the leave and submit a completed "Certification of Physician" form with their leave request. Employees who do not return to work with the District shall be required to repay the Board contributions made during their unpaid leave.
    - i. Eligibility:

All full-time employees covered by this agreement who have worked for the Board at least twelve (12) months preceding the start of leave may be entitled to a total of twelve (12) work weeks of unpaid leave during any twelve (12) month period when leave is taken for one or more of the following circumstances:

      - a. The birth of a son or daughter of an employee and to care for the child.
      - b. The placement of a son or daughter with an employee for adoption or foster care.
      - c. To care for the spouse, son, daughter or parent of an employee, if the family member has a serious health condition.
      - d. The employee is unable to perform the functions of the position because of the educational support personnel's own serious health condition.

N. Bereavement Leave

- 1. A full-time employee who has completed the probationary period and has exhausted all available leave may apply for up to (2) days paid bereavement leave in the event of a death in his/her immediate family to make funeral arrangements or to attend the funeral.
  - i. Immediate family is defined as a spouse, parent, grandparent, sibling, or children.
  - ii. An employee may apply for a maximum of 2 days paid bereavement leave per fiscal year.
- 2. Bereavement leave is not accumulative. Employees will not be paid bereavement for days not scheduled to work. Employees are required to provide a copy of the obituary or other satisfactory document to be attached to the leave request.

## ARTICLE VII PERFORMANCE APPRAISAL

The parties recognize that the evaluation of the performance of all employees is the responsibility of the administration. The evaluation process is designed to assess and communicate performance effectiveness, to aid in improving performance of assigned duties, and if necessary, to develop a performance improvement plan to assist in addressing deficiencies for the employee whose performance is not satisfactory. The process is not to be used as a vindictive measure.

- A. An annual performance assessment shall be made of each employee by his or her immediate supervisor or the superintendent's designee. The period covered by the annual evaluation shall coincide with an employee's school year/fiscal year contract.
- B. Within two (2) weeks after the beginning of employment, or as soon thereafter as practicable, each employee shall be given a copy of the non- instructional assessment criteria or the appropriate form to be used. This distribution shall be followed by an explanation and discussion of the assessment process.
- C. The supervisor shall schedule a meeting with the employee to discuss the Annual Performance Assessment no later than fifteen (15) days after the completion of the evaluation period or by June 30, whichever is earlier. Each completed assessment form for the employee and all copies of it shall be dated and signed by the immediate supervisor and the employee, with the employee receiving one copy. The employee's signature indicates only that he/she has read the completed form, and not necessarily that he/she agrees with the assessment. The employee may attach any written comments to any written assessment within ten (10) days of the assessment review meeting.
- D. If the assessment indicates that the employee is not performing in a satisfactory manner, the immediate supervisor or the superintendent's designee shall provide assistance to the employee in correcting the areas of poor performance within a reasonable prescribed period of time.
- E. The process of performance assessments of each employee shall continue throughout the duration of her/his employment, with each assessment subject to amendment whenever such amendment shall, in the opinion of assessor, be justified, and may be based on any information that is available to him/her at the time assessment is made.
- F. "Needs Improvement" or "Unsatisfactory" Evaluations.
  1. "Needs Improvement" Evaluation.
    - i. An employee who receives an overall "Needs Improvement" evaluation shall be provided a Professional Development Assistance Form within ten (10) days of such receipt that contains at least the following information:
      - a. a description of the performance that needs to be improved;
      - b. the performance improvement desired;
      - c. assistance to be provided the employee including supervisory feedback, training, etc;
      - d. length of time within which to achieve the improvement; and
      - e. possible consequences for failure to improve performance.
    - ii. An employee, excluding employees within their first 97 days of employment, shall be provided a total of at least sixty (60) days or until the end of their work year whichever comes first, within which to improve performance to a "Satisfactory" level. The employee's performance shall be reevaluated within ten (10) days of the conclusion of the performance period.
    - iii. Annual salary increases shall not be withheld based on a "Needs Improvement" evaluation.
  2. "Unsatisfactory" Evaluation.
    - i. An employee who receives an overall "Unsatisfactory" evaluation shall be provided a Professional Development Assistance Form within ten (10) days of such receipt that contains at least the following information:
      - a. a description of the unsatisfactory performance;
      - b. the performance improvement desired;

- c. assistance to be provided the employee including supervisory feedback, training, etc;
    - d. length of time within which to achieve the improvement; and possible consequences for failure to improve performance.
  - ii. An employee shall be provided a total of at least forty (40) days, or until the end of their work year whichever comes first, within which to improve performance to a "Satisfactory" or "Needs Improvement" level. The employee's performance shall be reevaluated within ten (10) days of the conclusion of the performance period.
    - a. If, at the end of such period, an employee's performance continues to be evaluated as "Unsatisfactory", the supervisor may provide the employee with up to an additional forty (40) days to improve to a "Satisfactory" or Needs Improvement" level, or may proceed to terminate the employee's appointment.
    - b. If, at the end of such period, an employee's performance is evaluated as "Needs Improvement", the supervisor will continue to evaluate the employee under the procedures in F, 1, above.
- 3. An employee whose performance is evaluated as "Unsatisfactory" shall not receive a salary increase during the period that such evaluation is in effect. If an employee's evaluation improves to "Satisfactory" or "Needs Improvement" during a period of no more than forty (40) days after the effective date of a salary increase, the employee shall be provided the salary increase on a prorated basis from the date of such evaluation.

**ARTICLE VIII**  
**TRANSFER AND REASSIGNMENT, LAYOFF AND RECALL**

**TRANSFER AND REASSIGNMENT**

1. Definitions
  - A. Reassignments defined – A reassignment is movement of an employee from one position to another at the same work site.
  - B. Transfer defined – A transfer is movement of an employee from one work site to another.
  - C. Seniority defined – Seniority is defined as the total number of years the employee has been continuously employed by the Gadsden County School Board.
  - D. Qualifications: No employee shall be required to re-qualify for a position when seeking a transfer or reassignment to a position of equal qualifications.
2. Voluntary reassignment will be accomplished in the following manner:
  - A. Employees desiring reassignment may submit a written request to the facility manager during the vacancy period as posted.
  - B. All employees submitting the written request for reassignment within the worksite where a vacancy exists will be interviewed first.
  - C. The worksite manager will take the voluntary reassignment request for the position(s) available, and make a final determination among the candidates based on the following:
    1. Qualifications,
    2. Length of service in the district,
    3. Preferences of those requesting voluntary reassignment and,
    4. An interview.
  - D. Employees who are reassigned shall retain all experience credit for the purpose of their hourly wage rates and benefits as provided by this contract.
3. Voluntary transfers will be accomplished in the following manner:
  - A. Employees desiring voluntary transfer will submit a copy of a transfer form to the employee's immediate supervisor, and the district personnel office, during the vacancy period as posted.
  - B. All employees submitting transfer forms shall be interviewed following those employees who submitted reassignment forms.
  - C. The work site manager will take the voluntary transfer list and the list of positions available, making final determination based on the following:
    1. Qualifications,
    2. Length of service in the district,
    3. Preferences of the voluntary transfers and,
    4. An interview.
  - D. Employees who are voluntarily transferred shall retain all experience credit for the purpose of their hourly wage rates and benefits as provided by this contract.
  - E. Paraprofessionals who are employed in a Title I program and fall under the guidelines of

ESEA will be given priority to interview for vacancies to other work sites rather than meet additional requirements placed on Title I employees.

4. When involuntary transfer(s) in a school or department is necessary, the following procedure shall be followed:
  - A. The Superintendent shall determine the areas of reduction in specific departments.
  - B. Volunteers shall first be considered. Volunteers shall be transferred provided there is a school or program that is entitled to an employee with the volunteer's qualifications and the volunteer is approved by the receiving facility manager.
  - C. When there are not enough volunteers, involuntary transfers may be made. An involuntary transfer list shall be made based on the length of service in the district with the lowest in length of service being transferred first.
  - D. A list of positions with necessary qualifications to fill each position will be made from all school or departments needing additional employees. Said list will be made available to all who are being transferred involuntarily.
  - E. Involuntary transfers will indicate their preference of the available positions.
  - F. The Superintendent will take the involuntary transfer list and the list of positions available, making assignments based on the following:
    1. Qualifications,
    2. Length of service in the district,
    3. Preferences of the involuntary transfers and,
    4. An interview.
  - G. In the event that no position exists for which the involuntary transfer is qualified, the employee will be placed in layoff according to Article VIII.
  - H. Employees who are involuntarily transferred shall retain all experience credit for the purpose of their hourly wage rates and benefits as provided by this contract.
5. A volunteer is qualified if:
  - A. He/she is currently employed in a position with the same job classification; or
  - B. He/she has met the same requirements as specified on the job description.
6. A hiring freeze shall be in effect within that category while the involuntary transfer process is in progress.

#### Reduction in Personnel

In the event the School Board determines that the number of employees must be reduced, written notice shall be provided to GESPA. For the purpose of this article, the non-renewal of an annual status employee at the end of his/her contract shall not be deemed a reduction in personnel. The following procedures shall be controlling:

#### LAYOFFS

1. The School Board shall determine the departments, programs, areas, schools, work locations, and/or classifications in which the reductions or layoffs of employees shall take place.
2. Before laying off permanent status employees, the School Board will place permanent status employees in positions within the same job classification held by annual status employees.
3. The order of layoff of members of the bargaining unit shall be employees having the least amount

of experience in the Gadsden County School District within the affected job classifications.

**RECALL**

1. The School Board shall determine the positions in which recall will be made and the number of employees to be recalled.
2. Employees shall be recalled in-the inverse order of layoff.
3. It shall be the responsibility of the employee to keep the Board informed of a current mailing address where a letter of recall can be sent. Letters of recall will be mailed by certified mail to the employee to the last address provided to the Board. Failure to respond to the letter of recall within ten (10) days after the receipt will be considered a resignation and the employee shall have no further right to recall.
4. If the employee has not been recalled within twelve (12) months, the layoff shall be considered permanent.

## ARTICLE IX GENERAL EMPLOYMENT PRACTICES

- A. Notice of all openings and vacancies shall be posted by the Superintendent or his designee for five (work days) days prior to the filling of the vacancy, in the district administration building and shall be transmitted to all work-site supervisors, who shall post the notice at the site. A copy of all vacancies shall be e-mailed or sent to the GESPA President prior to the five day posting notifying GESPA of all vacancies.
- B. For consideration for appointment to a summer employment position, an employee must file with the Superintendent on or before May 1 of each year, a written application on a form to be furnished by the Superintendent. In making assignments of employees to summer positions, the Board will take into consideration relevant factors including but not limited to continuous employment by the Board.
- C. A person employed to fill a full-time position shall be appointed to that position on probationary status for a period of six (6) months. A probationary employee is entitled to all benefits provided a regular employee including the right to become or not to become a member of the union.
- D. Employees may be dismissed from a position in which they hold probationary status at any time without the necessity for the showing of cause.
- E. For the first three years of employment, non-instructional personnel can be non-renewed at the end of a contractual year without specifying cause. After three (3) consecutive years of active employment and a recommendation for the fourth year, non-instructional personnel shall be classified as permanent employees.
- F. A permanent status person promoted within a job class shall serve in the higher classification on probationary status for three (3) months. The employee shall retain permanent status in the lower classification unless dismissed for cause for other than unsatisfactory performance. A permanent status person who voluntarily transfers to another job class shall serve in the new position on probationary status for three (3) months after which he/she will be granted permanent status.
- G. A permanent employee's status shall continue from year to year unless the Superintendent terminates the employee for just cause or the Superintendent reduces the number of employees on a district-wide basis for financial reasons.
- H. In an effort to assure the safety of all students and employees, the Gadsden County School Board has developed and implemented a Drug-Free Workplace and Drug and Alcohol Testing Program. The Policies and Procedures governing the Drug Free Work place and Drug and Alcohol Testing Program will be strictly adhered to.
- I. Employees under contract who admit they have an alcohol and/or drug problem, or who test positive, will be required to complete a substance abuse rehabilitation program at an authorized rehabilitation center. Accrued sick leave, vacation, short term disability benefits and leave of absence may be used for the period of time the employee is in rehabilitation. The School Board, with the cooperation of the employee, will make a one-time attempt to rehabilitate the employee prior to any job action being taken.
- J. For each classification, job descriptions will be developed and job incumbents will be provided the opportunity to have input into their job descriptions when developed and/or revised. Employees have the right to have their job descriptions reviewed by their manager/director. Job descriptions shall be distributed to all current non-instructional employees for the position to which they are assigned. The description shall include as a minimum:
  - 1. Job title and Description
  - 2. Minimum skills and qualifications required
  - 3. A specific statement of required tasks and responsibilities. Any evaluations of non-instructional employees' work performance shall be based solely upon said job descriptions and in accordance with Article VII – Performance Appraisal.

## ARTICLE X EMPLOYEE DISCIPLINE AND PERSONNEL FILES

Provisions of this article shall not pertain to probationary employees.

- A. The Superintendent, acting through his/her designees, may discipline employees for just cause. Just Cause shall be defined as:
1. The Board or its designees made an effort to discover if, in fact, the employee did violate or disobey a rule or order of management or did commit any of the acts referred to by Section 1012.33, Florida Statutes or violate any provision of the Department of Education Code of Ethics, prior to taking official action or,
  2. The Board or its designees conducted a fair and objective investigation of the facts.
  3. The Board applied its rule and penalties uniformly and without discrimination to all employees.
  4. The employee was given an opportunity to present her/his side prior to official action being taken.
  5. The Board's rule or order that the employee is alleged to have violated was not arbitrary, capricious or discriminatory.
  6. The Board gave the employee forewarning of the consequences or possible consequences if the employee did not obey the rule or order.
  7. When determining the degree of discipline, consideration will be given to the employee's service record and the nature of the offense.
- B. Representation at Investigatory Discussion. When an employee is requested to appear before a site administrator/supervisor for the purpose of discussing matters that could be expected to lead to discipline or dismissal, the employee is entitled to have a representative present, upon request. An employee shall be notified at least forty-eight (48) hours in advance of such meetings, unless the seriousness of the matter dictates a shorter period of twenty-four (24) hours advance notice, and shall be advised of his/her right to have representation at the meeting. This provision shall not apply to meetings related to the employee assessment process described in Article 7 except for meetings that may be held to discuss a Professional Development Assistance Form related to an overall "Unsatisfactory" or "Needs Improvement" evaluation under Section C.
- C. Disciplinary Procedures - Suspension without Pay and Dismissal. When disciplinary action in the form of suspension without pay or dismissal is proposed, an employee shall be provided the procedural safeguards described below. These procedures include providing the employee with a "Predetermination Notice" (Section C 1.), an opportunity for a "Predetermination Conference" (Section C 2.), and a "Notice of Recommended Final Action" (Section C 3.)
1. Predetermination Notice: Form and Delivery.
    - a. The employee shall be provided a written "Predetermination Notice" of the proposed action by personal delivery or certified mail, return receipt requested, at least ten (10) days prior to the date the action is to be taken. An employee may be suspended temporarily with pay, however, without such prior notice, until a decision is rendered and effective in the evidentiary hearing described in Section D, below.
    - b. The "Predetermination Notice" shall be signed by the site administrator/supervisor who is authorized by the Superintendent to discipline employees and shall include the following contents:
      - i. The disciplinary action proposed and its effective date.
      - ii. The specific charges or reasons for the action, including identification of any documents and witnesses on which the charges are then known to be based.
      - iii. A statement advising the employee that he/she may, within five (5) days of receipt of the "Notice," submit a request in writing on a form enclosed with the "Notice" for a "Predetermination Conference" in order to make an oral or written statement, or both, to the Superintendent's designee to refute or explain the charges made against the employee. The "Notice" shall state that failure of the employee to submit the written form requesting a "Conference"



within five (5) days constitutes a waiver of his/her rights to such "Conference" and that in the absence of a response, the proposed disciplinary action shall become effective as proposed in the "Notice."

- iv. The "Notice" shall give the name and address of the person with whom the request for a "Predetermination Conference" shall be filed. The "Notice" shall advise the employee that the "Conference" will be held prior to the proposed effective date of the action, at a time and place determined by the Superintendent's designee, normally during regular business hours.
  - v. A statement that the Superintendent and the Board are sincere in their desire to reduce the risk of error in taking the disciplinary action against the employee and to avoid wrongful damaging of the employee's reputation by untrue or erroneous charges, and therefore, the Superintendent and the Board are sincerely interested in receiving and considering the employee's response.
  - vi. A statement advising the employee of his/her right to representation at the "Predetermination Conference."
2. Predetermination Conference.
- a. The "Conference" shall be conducted by the Superintendent's designee who shall recommend action to the Board concerning the employee.
  - b. The "Conference" shall be set on at least five (5) days notice, and accommodation shall be made to insure it is conducted at a time and in a manner mutually agreed upon by both parties. .
  - c. The person conducting the "Conference" shall convene the "Conference" at the time and place set and shall identify himself/herself, the employee and all other participants, and explain that the purpose of the "Conference" is to hear all sides of the charges so as to protect the employee from erroneous or arbitrary adverse action.
  - d. The "Conference" shall be formal. Its purpose shall be to discuss the basis of the proposed action and to reach a recommendation for final action. The Rules of Evidence shall not apply. The employee and the Board may bring a qualified representative to assist or advise him/her.
  - e. In order to promote an atmosphere conducive to free and open discussion of the charges and proposed disciplinary action, the parties may not cross-examine unwilling persons – managers or employees. The Superintendent's designee is responsible, however, for gathering information relevant to his/her decision and may, therefore, question anyone present in order to gather such information. In this regard, the Superintendent's designee shall ask questions of a party or witness, as requested by either party, in an area that is relevant to the decision.
  - f. The employee shall be permitted to submit relevant information personally and by witness, orally and in writing, with the privilege being reserved by the Superintendent's designee to give that information such weight, as he/she deems proper.
  - g. At the conclusion of the "Conference," the Superintendent's designee shall inform the employee when he/she will recommend whether to uphold the proposed disciplinary action.
3. Notice of Final Action.
- a. The Superintendent or designee shall notify the employee of his/her decision in writing by personal delivery or by certified mail, return receipt requested. If the decision is to uphold the proposed discipline, the "Notice of Recommended Final Action" must be provided to the employee at least five (5) days prior to the date the discipline is to be effective.
  - b. The "Notice of Recommended Final Action" shall specify the facts relied upon by the Superintendent's designee in reaching his/her decision, and shall refer to the policies, rules, laws or other legal basis on which the action is premised. The "Notice" shall endeavor to place the employee on actual notice of the decision-maker's

rationale.

- c. The "Notice of Recommended Final Action" shall also describe the employee's right to have the decision reviewed through an evidentiary hearing (see Section D, below). If the employee does not request an evidentiary hearing, the recommended final action will become Final Action when acted upon by the School Board. The Board or its designee will issue a Notice of Final Action within 5 working days of Board action.
  4. Period between Notice of Final Action and Effective Date of Action. During the period between the issuance of the "Notice of Final Action" and the effective date of any disciplinary action, the employee shall be expected to perform his/her usual duties without disrupting fellow employees, or other persons or the employer's activities. If it is deemed highly desirable or necessary that the employee not continue to perform the same duties in the same location during this period, the Superintendent or designee may temporarily assign the employee to other duties. Alternatively, an employee may be suspended with pay, as provided in Section C, 1.a.
  5. No Reprisal. An employee who participates in these disciplinary procedures shall not be subjected to reprisal, interference, or coercion as a result of such participation.
- D. Post-Determination Hearing.
1. A permanent employee who is suspended without pay or dismissed and who has participated in a "Predetermination Conference" and received a "Notice of Final Action" as described in Section C, 2 and 3., above, shall be entitled to a *de novo* evidentiary hearing in accordance with the procedures outlined in the Florida Administrative Procedures Act, Chapter 120, Florida Statutes. An employee must elect in writing to proceed with such a hearing within fourteen (14) days of receipt of a "Notice of Final Action" (see Section C. 3. c, above.)
  2. An employee who prevails in a post-determination hearing shall be entitled to back pay, less mitigating earnings; legal interest; other equitable relief, including correction of personnel records; and reasonable attorney fees and costs. The amount of any monetary award for back pay, interest, and attorney fees shall be determined by the Board, in the exercise of its discretion, based upon the evidence submitted.
- E. Public Reprimand. An administrator shall not reprimand an employee in the presence of the employee's colleagues, teachers (other than the supervising teachers), or in the presence of students or the parents of such students. When reprimand or criticism is deemed necessary, it shall be made with discretion and out of public view and hearing.
- F. Personnel Files.
1. An employee shall have the right to review the contents of all records of the Board pertaining to the employee originating after initial employment and to have a representative of GESPA accompany him/her in such review. Other examination of an employee's file shall be limited to qualified supervisory personnel, except that GESPA representatives, with an employee's permission, may review such files when necessary for contract administration purposes or to provide the employee representation in other administrative or legal proceedings. Each file shall contain a record indicating who has reviewed it, the date reviewed, and the reason for such review.
  2. Material relating to work performance or other matters that may be cause for discipline originating after initial employment must be reduced to writing within 45 days, exclusive of the summer vacation period, of the school system administration becoming aware of the facts reflected in the material before being placed in an employee's personnel file. The employee shall be given an opportunity to review and sign the material. The employee's signature shall acknowledge that the employee has reviewed the material but shall not be interpreted to indicate his/her agreement with its contents. Complaints against the employee shall be put in writing with names of complainants, administrative action taken, and remedy clearly stated. The employee may respond in writing to any material, including complaints, which response shall be attached to the file copy of the material in question.
  3. All recommendations shall be based solely on the contents of the employee's personnel file.

## **ARTICLE XI INSURANCE**

- A. Board shall provide for each employee, without cost to him/her, group term life and dental insurance. The Board will contribute for each employee no less than seventy-five percent (75%) for Capital Health Plan Insurance monthly to be applied toward payment of the single rate premium for Hospital-Medical-Surgical insurance.
- B. The Board during the life of this Agreement may at its sole option increase or decrease any and/or all of the benefits provided under this plan notifying the GESPA of any such increase(s) or decrease(s) at least thirty (30) days in advance.
- C. An insurance committee consisting of 3 members appointed by each bargaining unit and 3 members appointed by the Superintendent shall be established to investigate insurance alternatives and make recommendations to the Board and their respective members. This committee shall convene in January of each year and shall report its findings to each party prior to the regularly scheduled March Board meeting. The committee shall be advisory in nature and devise its own internal working procedure. Should the committee not convene and make recommendations as required, the Board shall proceed, as it deems appropriate in matters relating to its insurance provisions.

## ARTICLES XII HOURS AND WORKING CONDITIONS

The employee work year shall be as indicated in the chart below:

CODE	JOB TITLE	STATUS	HRS. PER DAY
	Ass't Secretary	10 Month 195 days	8
*	Ass't Food Service Mg	10 Month	6.5 – 8
*	Bus Driver	10 Month - 180 days	2 – 8
*	Bus Attendants	10 Month – 180 days	2 – 8
	Routing Specialist	12 Month – 240 days	8
	Custodian	12 Month – 240 days	8
	District Receptionist	12 Month – 240 days	8
	District Secretary	10 Month	8
*	Food Service Worker	10 Month – 183 days	2 – 7.5
	Custodial Assistant	11 Month – 214 days	8
	Maintenance Employees	12 Month – 240 days	8
	Ed. Paraprofessional	10 Month – 191 days	7.5
	Warehouse Employees	12 Month – 240 days	8

(\*) These positions carry a range of hours as indicated. Hours are designated based on specific position need.

For the 2013-2015 school years, a committee consisting of 3 members appointed by GESPA and 3 members appointed by the Superintendent, shall be established to review working conditions and make recommendations as needed. The committee shall be advisory in nature and shall devise its own internal working procedure. The committee shall convene in October and shall report its findings to the chief negotiators before December 31 each year.

- A. Compensatory Time. Compensatory time shall be granted when the following provisions are met.
1. Earning of Compensatory Time.
    - a. Pursuant to the provisions of the Fair labor Standards Act and pertinent CFR provisions, the Board may choose to offer compensatory time, at a rate of one and one-half hours for each overtime hour worked, in lieu of overtime compensation, for time spent by employees engaging in duties beyond the normal contractual day causing them to work beyond their normal work week (40 hours).
    - b. Compensatory time is not actually accrued and available for use until the end of the work week during which the additional hours were performed. Further, while long-term additional duties beyond the normal work weeks may be pre-approved by a supervisor and/or a representative of the Superintendent for administrative convenience, compensatory time for carrying out such long-term, extra duties only accrues and becomes usable on a weekly basis at the end of each work week in which the employee carries out the extra duties extending beyond the normal work week;
    - c. Federal law applicable to this bargaining unit's members presently authorized the accrual for compensatory time up to 240 hours; however, the District supervisors shall make every reasonable effort to limit the number of accrued compensatory time hours to 40. Notwithstanding the intention of the parties to manage and restrict compensatory time hours in this manner, employees must either be allowed to continue to accrue compensatory time beyond 40 hours up to the maximum allowable number of 240, or be paid overtime wages at one and one-half times their normal pay

rate whenever their supervisors ask or expect them to take additional duties that cause them to have an accrued balance of more than 240 hours of compensatory time, the District must pay appropriate overtime wage compensation for all compensatory hours accrued beyond 240;

- d. The nature and extent of employee assignments beyond the normal workday for which compensatory time will be granted shall be determined by the site administrator consistent with the provisions of this Contract.
- e. Compensatory time accrual shall apply to activities, such as faculty meetings, bus duty beyond the normal workday, parent-teacher organization meetings, school open houses and other extra, school related activities that require employees to carry out additional duties beyond their normal work day/work weeks.

2. Use of Compensatory Time.

- a. Consistent with the parties' stated goal of restricting the accrual of compensatory time to a maximum of 40 hours, site administrators shall approve all reasonable employee compensatory time leave requests unless doing so would demonstrably create an unavoidable burden upon the function of the site administrator's operation;
- b. The District may, at its discretion, substitute the payment of overtime wages, at a rate of no less than one and one-half times the employee's normal hourly rate, for accrued compensatory time;
- c. Accrued compensatory time shall remain available for the employee's future use and cannot be forfeited or otherwise determined to have lapsed;
- d. Within the first 30 days of the employee contract year, each site administrator shall provide to employees at the site a copy of the plan for implementing compensatory time at that site that is consistent with the provisions of this section.
- e. Upon an employee's termination, resignation, retirement or separation from employment for any reason, accrued compensatory time shall be converted to into overtime wages and paid to the employee at a rate of not less than one and one-half times the regular rate of compensation.

B. An employee shall be given written notice of his/her employment status for the forthcoming school year/fiscal year no later than the final day of the employee's school year/fiscal year contract. In the event changes in an employee's appointment are proposed, the employee affected shall be notified promptly in writing. The employer reserves the right to adjust hours of work to meet program needs.

C. Work Break and Lunch Period.

- 1. Work Break. Employees shall be granted one fifteen (15) minute break near the middle of each four (4) consecutive hour work period. Unused work breaks shall not be accumulated nor shall work breaks be scheduled at the beginning or end of a work shift.
- 2. Lunch Period. An unpaid duty-free lunch period of at least thirty (30) minutes shall be provided for any employee scheduled to work more than four (4) consecutive hours.

D. Cafeteria workers and assistant managers who were certified by the Florida School Food Service Association during the prior school year shall be paid \$150.00 bonus in August of the new school year, provided they are reemployed.

- 1. One lunch is provided for school food service employees for 180 school days. One breakfast is provided for school food service employees who work in the breakfast program.
- 2. The School Board will provide three uniforms for all cafeteria employees.

E. Transportation Employees

- 1. Bus drivers shall be paid for actual time worked.

- a. All bus drivers will be paid a daily minimum of four (4) hours which shall include one (1) additional hour for related duties. In the event the actual driving time exceeds three (3) hours plus one (1) hour for related duties, the driver's salary shall be based on actual driving time plus one (1) hour for related duties.
- b. Definitions
  - i. "Driving time" is defined as that time necessary to drive a school bus from a central storage location or residence to the first student pick-up of the route and from the last drop-off to the appropriate parking location.
  - ii. "Related duties" is defined as any duty assigned or required that does not fall under the definition of driving time.
  - iii. "Reposition" is movement of a bus driver from one route to another during the school year or during rerouting in the summer months.
  - iv. "Medically complex children" are children who are health impaired that have a physical condition that is chronic in nature.

2. Days and hours of other transportation employees will be recommended by the Supervisor of Transportation.

3. Field Trip Procedures

- a. Employees may be employed in addition to their regular duties to drive school buses for field trips and other extracurricular activities, providing they hold the proper license. Regular bus drivers will be paid at a rate of \$9.00 per hour, if paid from school internal accounts, and \$15.00 per hour for all grants, but not less than school internal accounts rate and substitute drivers will be paid at a substitute rate for field trips and extracurricular activities.
- b. Bus drivers wishing to drive for field trips and other extracurricular activities may be considered by completing a request to be placed on a list for field trips or other extracurricular activities. Bus drivers who request that their names be placed upon such a list will be selected to drive in order of seniority. Each driver on the list will be offered an opportunity to drive for field trips or extracurricular activities before repeat drivers are offered additional trips.
- c. There will be two (2) documented attempts over a period of two (2) days to contact a driver. If an answering machine is contacted, a message will be left to call the Transportation office. In the event of less than two days notice of a field trip is given, management will use the first available driver according to the seniority list. Drivers who cannot be contacted because of the short notice will not lose their regular rotation.

In the event of a short notice (two hours prior to the trip) the next eligible driver may reject without losing their position on the roster. Except in cases of emergency, in the event a bus driver fails to show for a scheduled field trip, he/she shall forfeit his/her position on that field trip roster for one rotation. Operators who fail to report for assigned trips or who regularly reject trips without legitimate reasons shall be counseled concerning whether they wish to remain on the list. Continuation of either practice shall cause an operator to be deleted from the list. In addition they will not be allowed to make up the trip they failed to show for.

- d. Management has the right to pass over drivers that would earn overtime if assigned a field trip at that time. Drivers passed over will not lose their regular rotation.
- e. All trips assigned for the previous month will be posted in the Transportation Department by the tenth of the month. Postings will show persons assigned, hours, dates and number of trips taken.
- f. When a driver's turn for a field trip occurs during regular working hours, a substitute must be placed on that route. If the regular driver is out past midnight, the substitute is to return for the A.M. route. The driver is to report for the P.M. route.
- g. Trips are to be issued by geographic area unless otherwise requested.
  - i. Work in geographic area
  - ii. Work district wide

4. Transportation positions available for summer employment for bus drivers shall be filled as follows:
  - a. Available positions shall be posted at each work site as soon as practical prior to the beginning of summer for bus drivers.
  - b. Applicants from within the school system shall be afforded the first opportunity to apply for the available positions.
  - c. Seniority among current employees shall be the determining criteria for the filling of the available positions. If a driver is assigned a position and a grant position later becomes available a driver may apply in writing for the posted grant position.
  - d. Management reserves the right to assign drivers the routes involving medically complex children without regard to seniority. Medically complex children are defined as children who are health impaired children that have a physical condition which is chronic in nature. Criteria for selection of such drivers shall be experience transporting medically complex children and/or special training relating to providing services to medically complex children.
5. Repositioning of drivers:
  - a. Employees desiring to reposition may submit a written request to the Supervisor of Transportation when an open route becomes available.
  - b. The Supervisor of Transportation will make a determination of the repositioning of drivers based on the following:
    - i. qualifications
    - ii. length of service to the district as a bus driver
6. Bus drivers who serve as Lead Drivers will be paid a ten percent (10%) supplement above the salary to which they are otherwise entitled.

F. The Association and the employer will work collaboratively to comply with any Federal or State law that has an adverse impact on any bargaining unit member. A committee consisting of three members appointed by the bargaining unit and three members appointed by the Superintendent shall be established to work collaboratively to develop a district wide plan to develop implementation and guideline procedures relating to any federal or state law. This committee shall convene and shall report its findings to the School Board at a board meeting. The committee shall be advisory in nature and devise its own internal working procedure. Hereafter, the policies and procedures of the Transportation Department found in the Gadsden County School Bus Driver Handbook shall be referred to as "The Handbook". Any changes to "The Handbook" that impact wages and terms of conditions of employment, shall be negotiated pursuant to Chapter 447.

G. MAINTENANCE AND CUSTODIAL/JANITORIAL ON-CALL AND CALL BACK PROCEDURE

**Definitions:**

After-Hours – For this document, on-call and after-hours are synonymous and interchangeable.

On-Call – The status of an employee that has agreed to be available for a specified time after normal business hours.

On-Call Hours – The time outside of normal business hours. The following schedules are current but are subject to change. Schedule changes would not require further Board action for on-call.

**Maintenance Schedule**

Normal Schedule – 4:00 pm to 7:30 am Monday through Friday and all-day holidays and weekends.

Summer Schedule – 5:00 pm to 7:00 am Monday through Thursday and all-day Friday, holidays and weekends.

On-Call Work Week - An on-call work week starts at 4:00 PM Monday and runs to 7:30 AM the following Monday.

**Custodial Schedule**

Custodial On-call schedule is optional at the discretion of the principal at each school. Schedules may vary based on normal working hours for each custodian.

Call-Back – Call-back is when an employee has been dispatched back to work after normal business hours.

**On-Call Obligation:**

An on-call employee is not required to remain on site but is required to be available and in fit condition for duty. Fit condition shall include refraining from the use of alcohol and/or other substances which may impair the employees' ability to drive and perform required duties while on-call.

In the event an on-call person falls sick during his appointed time, he shall immediately notify his supervisor so duties can be assigned to another employee.

If supplied, on-call employees are required to wear their district issued cell phone. When contacted, the on-call employee is required to respond within 20 minutes and when called-back to work, should be onsite within 90 minutes. On-call employees shall ensure they can be reached when called.

**On-Call and Call-Back Pay:**

There are 168 hours per week. Subtract the normal 40-hour work week and it leaves 128 on-call hours. On-call pay shall be calculated at \$1.00 per hour.

When called-back to work after hours, an on-call employee shall receive their normal hourly pay rate while on the job. This is in addition to the \$1.00 per hour rate. There shall be a 2-hour minimum for call-back.

The on-call employee shall be responsible for logging and submitting call-back time. Travel time is not calculated as time worked.

Overtime or compensatory time shall be only accrued on hours worked over 40 per week. On-call hours are not counted as hours worked. On-call rate is added to the employee's normal hourly rate when calculating overtime.



## ARTICLE XIII TERMINAL PAY

- A. All payments made pursuant to this Article shall be subject to law and rules and regulations of the Florida State Board of Education.
- B. Terminal pay for accumulated sick leave will, except as hereinafter otherwise indicated, be provided to all full-time employees at resignation without retirement, at normal retirement, or to the beneficiary if such service is terminated by death. The sick leave days used in calculating the amount of such terminal pay shall not include any such days earned otherwise than in full-time service of this School District. Such terminal pay shall not exceed an amount determined as follows:
1. For the individual herself/himself, upon separation from such service by resignation without retirement, PROVIDED that he/she must then have been in the full-time creditable service of this School District for at least twenty (20) years: the daily rate of pay of the individual at that time multiplied by one hundred (100) percent times the number of days of accumulated sick leave.
  2. For the individual herself/himself, upon normal retirement, PROVIDED that he/she must then have been in the full-time creditable service of this School District for at least ten (10) creditable years, a sum determined by multiplying the individual's then current average daily rate of pay by her/his number of days of accumulated sick leave, times a percentage figure depending on her/his number of years of such service, as hereinafter indicated:
    - After the 10th year 50%
    - After the 11th year 50%
    - After the 12th year 50%
    - After the 13th year 65%
    - After the 14th year 70%
    - After the 15th year 75%
    - After the 16th year 80%
    - After the 17th year 85%
    - After the 18th year 90%
    - After the 19th year 95%
    - After the 20th year 100%
  3. For the beneficiary, upon the death of the individual in the service of this School District, a sum determined by multiplying the decedent's then current average daily rate of pay by her/his number of days of accumulated sick leave, times a percentage figure depending on her/his number of years of such service, as hereinafter indicated:
    - During the first 3 years 35%
    - During the next 3 years 40%
    - During the next 3 years 45%
    - During the next 3 years 50%
    - During the 13th year 60%
    - During the 14th year 65%
    - During the 15th year 70%
    - During the 16th year 75%
    - During the 17th year 80%
    - During the 18th year 85%
    - During the 19th year 90%
    - During the 20th year 95%
    - During and after the 21st year 100%

Such terminal pay, when paid upon resignation without retirement, or upon normal retirement, shall be paid only where the individuals resignation or retirement is concurrent in time with

her/his separation from the full-time service of this School District, except those employees enrolled in DROP, and then only if he/she is resigning or retiring under favorable circumstances, and not, for example, if the individual is being or has been dismissed by the Board, or if proceedings for such dismissal are pending. Further, such payment shall not be made if, within three (3) calendar years preceding the individual's separation from the full-time service of this School District, the individual has or shall have been convicted, under the laws of the United States of America or any State thereof, of a felony. The plea of guilty in any court, or the decision of guilty by any court, or the forfeiture of a bond in any court of law, or the written acknowledgment of having so committed any such offense, duly witnessed and made to the Superintendent or his duly appointed representative or the School Board, shall, for the purpose of this Article, have the same effect as that of a conviction of the offense.

- C. "Normal retirement," is defined as having 10 years of creditable service and age 62; or 30 years of creditable service regardless of age (this can include credit for up to 4 years of military service). For those employees who elect to participate in DROP, compensation will be disbursed according to School Board Policy.
- D. Terminal pay for accumulated sick leave paid to any person pursuant to this Article XIII shall totally replace and be in lieu of any and all payments to which the recipient might otherwise be entitled pursuant to any rule or other provision by the Board relating to terminal pay for accumulated sick leave.

## ARTICLE XIV PROFESSIONAL COMPENSATION

Salaries shall be paid to the employee on a monthly basis.

- A. Classroom Coverage. An employee may be placed in charge of a classroom under the following circumstances:
1. An employee may be assigned to a classroom for up to two hours when the unanticipated absence of a certified teacher requires such classroom coverage. If an employee is assigned to provide such coverage for more than two hours during a day, the site administrator shall compensate the employee for the total hours worked during the day in this capacity under the provisions of paragraph 2 below. In circumstances of unanticipated absence that extend beyond two hours, site administrators shall, consistent with other staffing needs, assign one employee to provide coverage during the entire period rather than two or more employees at various times throughout the day. Site administrators shall, where possible, assign for this purpose only those employees who have indicated an interest in receiving such assignments.
  2. When a teacher notifies a site administrator that s/he is sick, going to be on personal leave, or on In-Line-of Duty, an employee may be assigned as a substitute teacher. Administrators shall, consistent with other staffing needs, assign one employee to provide coverage during the entire period of absence rather than two or more employees at various times throughout the period. Site administrators shall, where possible, assign for this purpose only those employees who have indicated an interest in receiving such assignments. If the employee is assigned to provide such coverage for more than two hours during a day, the employee will be paid one and one-half times their regular hourly rate of pay or at the current substitute teacher rate, whichever is greater, for the total time worked as a substitute, including any time worked during the day in the status described in paragraph A above.
- B. Automobile Allowance: An employee covered by this Contract who uses his/her automobile for School Board business shall be compensated for such travel at the current rate established by the Board. Such mileage reimbursement shall not include routine travel to or from the employee's home and an assigned work location. In order to receive mileage reimbursement, the employee must complete the proper forms and have the proper authorization as provided in Board policy.
- C. Employees who are required to be on call District-wide and carry an emergency phone that significantly restricts their freedom of movement and may necessitate their returning to the work site may use their assigned county vehicle to travel between their home and regular work site as well as to travel to the site of any emergency during the days that they are assigned such district-wide on-call assignment.
- D. Employees who are required to participate in Staff Development outside their regular workday will be compensated at their hourly rate of pay, including overtime where applicable.
- E. Employment after retirement – Beginning July 1, 2008 all retirees who remain unemployed for the appropriate time as defined by law and are reemployed with the School Board to appropriate positions as defined by F.S. 121.09 (9) (b) (3) will be placed on the salary schedule at Step 0 for their appropriate job assignment. Retirees will have the ability to move through normal step progressions for each year of service. Retirees who return to service with the School Board will remain on annual contract status until their relationship with the district is severed.

**ARTICLE XV  
AMENDMENT AND DURATION**

- A. Entire Agreement.
1. The parties acknowledge that during the negotiations resulting in this Contract, each had the unlimited right and opportunity to make demands and proposals with respect to any and all subjects or matters not removed by law from the area of collective bargaining and that the understandings and agreements arrived at by the parties after exercise of that right and opportunity are set forth in this Contract. This Contract constitutes the entire agreement between the parties and concludes collective bargaining for its term, subject only to a mutual agreement by the parties to modify the Contract. Such changes shall be reduced to writing, ratified and signed by the parties, and shall become an amendment to this Contract.
  2. The Board and GESPA each voluntarily and unqualifiedly waive the right, and each agrees that the other shall not be obligated, to bargain collectively with respect to any subject or matter not specifically referred to or covered in this Contract, even though such subject or matter may not have been within the knowledge or contemplation of either or both of the parties at the time they negotiated or signed this Contract. As an exception to this provision, the parties will enter into negotiations that are necessary to address changes in terms and conditions of employment mandated by State or federal legislation.
- B. If a provision of this Contract is declared illegal or invalid by a court of competent jurisdiction, or rendered invalid by reason of subsequently enacted legislation, such action shall not invalidate the remaining provisions. In the event of such occurrence, the parties to enter into immediate negotiations for the purpose of arriving at a mutually satisfactory replacement for the part declared illegal or invalid.
- C. This Contract shall be effective on the date of its ratification by both parties and shall remain in full force and effect through June 30, 2023. New provisions shall be effective on the date of ratification unless a provision provides otherwise by its terms.

For the Gadsden Educational Staff  
Professional Association (GESPA)

For The School Board of Gadsden County

\_\_\_\_\_  
GESPA President

\_\_\_\_\_  
Chairperson

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

\_\_\_\_\_  
Big Bend Executive Director

\_\_\_\_\_  
Superintendent of Schools

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

\_\_\_\_\_  
Chief Negotiator

\_\_\_\_\_  
Date

**APPENDIX A  
NON-INSTRUCTIONAL SALARY SCHEDULE  
DISTRICT/SCHOOL LEVEL**

A 3% across the board salary increase for all non-instructional employees covered by the GESPA Contract to be effective upon ratification by both parties.

	T C H R A I D E	T C H R A I D E	T C H R A I D E	O T H  T R A N S	C U S T O D I A N	D R I V E R S	F O O D  P R E P	F O O D  S U P P V	R E C E P T I O N	S E C R E T A R Y	S E C R E T A R Y	O T H  M A I N T	M E C H A N I C	T E C H N I C I A N	O T H R  M A I N T
PAY-GRADE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
STEP															
0	17447.17	18316.49	19475.24	18028.09	21331.3	11360.9	14667.2	15884.66	24402.76	25272.08	25851.97	24692.19	29330.28	31403.67	35924.34
1	17621.24	18491.59	19650.34	18200.1	21516.7	11562.78	14789.77	16007.23	24646.87	25527.52	26142.43	25086.68	29792.75	31942.36	37049.1
2	17795.31	18663.6	19823.38	18375.2	21701.07	11767.75	14912.34	16128.77	24888.92	25781.93	26431.86	25480.14	30256.25	32477.96	38174.89
3	17968.35	18838.7	19998.48	18548.24	21886.47	11969.63	15033.88	16251.34	25133.03	26037.37	26721.29	25875.66	30720.78	33015.62	39299.65
4	18143.45	19012.77	20171.52	18722.31	22071.87	12171.51	15155.42	16373.91	25376.11	26291.78	27010.72	26269.12	31184.28	33552.25	40423.38
5	18316.49	19152.85	20345.59	18896.38	22257.27	12375.45	15276.96	16494.42	25620.22	26548.25	27302.21	26663.61	31648.81	34090.94	41549.17
6	18491.59	19359.88	20519.66	19070.45	22443.7	12578.36	15398.5	16615.96	25862.27	26802.66	27590.61	27057.07	32112.31	34627.57	42672.9
7	18663.6	19545.28	20693.73	19244.52	22629.1	12781.27	15520.04	16737.5	26107.41	27057.07	27881.07	27451.56	32574.78	35165.23	43798.69
8	18838.7	19706.99	20866.77	19418.59	22813.47	12984.18	15642.61	16860.07	26350.49	27312.51	28170.5	27846.05	33039.31	35701.86	44924.48
9	19012.77	19882.09	21041.87	19591.63	22999.9	13186.06	15764.15	16991.91	26593.57	27566.92	28460.96	28240.54	33502.81	36240.55	46048.21
10	19185.81	20056.16	21213.88	19766.73	23185.3	13390	15884.66	17102.12	26837.68	27823.39	28749.36	28634	33966.31	36777.18	47174
11	19359.88	20229.2	21388.98	19938.74	23371.73	13592.91	16007.23	17224.69	27080.76	28077.8	29039.82	29028.49	34430.84	37314.84	48298.76
12	19534.98	20403.27	21563.05	20113.84	23557.13	13795.82	16128.77	17346.23	27323.84	28332.21	29330.28	29421.95	34894.34	37852.5	49424.55
13	19706.99	20577.34	21736.09	20287.91	23741.5	13997.7	16251.34	17466.74	27566.92	28587.65	29620.74	29817.47	35357.84	38389.13	50549.31
14	19882.09	20750.38	21910.16	20460.95	23927.93	14202.67	16373.91	17590.34	27811.03	28842.06	29909.14	30210.93	35821.34	38925.76	51727.63
15	20056.16	20925.48	22085.26	20635.02	24113.33	14404.55	16494.42	17711.88	28055.14	29098.53	30199.6	30605.42	36284.84	39463.42	52798.83
16	20229.2	21098.52	22257.27	20810.12	24298.73	14606.43	16615.96	17833.42	28297.19	29352.94	30489.03	30998.88	36749.37	40001.08	53923.59
17	20403.27	21273.62	22721.8	21213.88	24808.58	14809.34	16737.5	17954.96	28982.14	29607.35	30778.46	31880.56	37212.87	41075.37	55071.01

**APPENDIX A-1 – GUIDE TO POSITIONS  
FOR APPENDIX A  
NON-INSTRUCTIONAL SALARY SCHEDULE,  
DISTRICT/SCHOOL LEVEL**

PAY GRADE 1:	Educational Aide, Clerical Assistant, Media Assistant, Parent Liaison, ESE Self Help Assistant-No College
PAY GRADE 2:	Educational Paraprofessional, Clerical Assistant, Media Assistant -AA Degree or Equiv.
PAY GRADE 3:	Educational Paraprofessional, Clerical Assistant, Media Assistant -Bachelors Degree
PAY GRADE 4:	Custodial Assistant, Bus Attendant
PAY GRADE 5:	Lead Custodian, Mechanic I, Warehouse Worker, Maintenance Assistant
PAY GRADE 6:	Bus Driver
PAY GRADE 7:	Cafeteria Worker
PAY GRADE 8:	Assistant Cafeteria Manager
PAY GRADE 9:	Receptionist-Xerox, Assistant Secretary
PAY GRADE 10:	Secretary I
PAY GRADE 11:	Secretary II
PAY GRADE 12:	Routing, Parts & Inventory Specialist, Maintenance Worker
PAY GRADE 13:	Parts Manager, Mechanic II,
PAY GRADE 14:	Audio Visual Equip. Technician, Boiler Mechanic, Electrician, Plumber, AC/Refrig. - Mechanic, Fire & Safety Inspector, Head Mechanic, Carpenter
PAY GRADE 15:	Lead Plumbing/Gas Mechanic, Lead Electrician, Lead HVAC Refrigeration Mechanic, Lead Boiler Mechanic and Lead Carpenter

Salaries are annual amounts based on the number of days indicated. Positions requiring less work days than those shown will be paid based on the salary rate for the classification times the number of days employed during the regular employment period.

Salaries for food service employees are based on 7.5 hours per day. Rates for food service employees who are hired to work less than 7.5 hours per day shall be determined by dividing the applicable annual rate by 183 days and by

7.5 hours per day, then multiplying the hourly rate times the hours and days to be worked. Hours worked by school food service employees shall be at the discretion of the School Food Service Supervisor.

Cafeteria workers and assistant managers who were certified by the Florida School Food Service Association during the prior school year shall be paid \$150.00 bonus in August of the new school year, provided they are reemployed and included on the current membership roster of the Florida School Food Service Association.

Lunch is provided for school food service employees for 180 school days. One breakfast is provided for school food service employees who work in the breakfast program.

Non-instructional Personnel will receive their step increases based upon completed years of experience and one classification, as verified by the District, each year beginning July 1 as reflected in the salary schedule in Appendix A.

The Superintendent may recommend that a new employee be credited with a maximum of five years of previous experience, based upon the individual's job training and/or knowledge of the position for which employed. The Superintendent may recommend that an employee be placed in a lower step than to which he/she might normally be placed, or held at the salary paid for the previous year, based upon limited experience and/or failure to perform his/her duties in a satisfactory manner.

**APPENDIX B**  
**MEMORANDUM OF UNDERSTANDING (MOU)**

**BETWEEN**

**THE GADSDEN COUNTY CLASSROOM TEACHERS ASSOCIATION, THE GADSDEN EDUCATIONAL  
STAFF PROFESSIONAL ASSOCIATION**

**AND**

**THE SCHOOL BOARD OF GADSDEN COUNTY, FLORIDA**

The Gadsden County Classroom Teachers Association (GCCTA), the Gadsden Educational Staff Professional Association (GESPA) and the School Board of Gadsden County (SBGC) hereby tentatively agree to the provisions set out below and will support the ratification of such provisions by the members of the GCCTA and GESPA bargaining units and the School Board of Gadsden County:

In an effort to attract and retain high quality employees to The School Board of Gadsden County and advance the District's goals and objectives contained in its Strategic Continuous Improvement Plan and the Schools of Hope (SOH) application, specifically and expressly awarded to George W. Munroe Elementary School (GWM) , the following modifications are agreed upon by the parties on this \_\_\_\_ day of March, 2018 and will be subject to annual review based on student performance data, available funds and on mutual agreement each year.

The parties further recognize that the successful execution of the Schools of Hope Grant is wholly dependent upon the cooperative and collaborative efforts of the parties.

Therefore, the parties agree as follows:

1. The Parties agree that the execution of this MOU constitutes support of the goals and objectives of SOH. The parties further agree that said signature does not constitute agreement to modify the existing Collective Bargaining Agreement (CBA) or to negotiate additional language. The parties, however, agree to engage and use their best efforts to develop a mutually agreeable plan to address reforms consistent with the objectives of SOH and according to Article IX, Section G of the GCCTA CBA or Article XII, Section F of the GESPA CBA.
2. The parties agree to use best efforts to develop a negotiated, mutually agreed upon implementation plan in the areas identified by the parties as part of the Plan. The signature of the Union President(s) on the MOU does not constitute an agreement to (a) reopen or otherwise modify the CBA, unless and until a subsequent negotiated time specific waiver or other agreement has been mutually agreed upon by the Gadsden County Classroom Teachers Association, the Gadsden Educational Staff Professional Association and the School Board of Gadsden County or (b) limit or waive its rights and protections under the Florida Constitution, the Florida Public Employees' Relations Act and other applicable laws.

3. The parties agree that any items in the grant that impact wages, hours or terms and conditions of employment or that may modify the current CBA are subject to bargaining in accordance with Chapter 447.
4. Any items relating to the SOH Grant or Plan that are unsuccessfully negotiated between the parties specifically for the purpose of applying for or receiving the Schools of Hope award will not be subject to the impasse procedures set forth in Chapter 447. Neither party will unilaterally declare impasse under Chapter 447 during negotiations of any provisions specifically for the purpose of applying for or receiving the SOH award.
5. In the event that negotiations result in modification to the existing CBA, the Gadsden County Classroom Teachers Association, the Gadsden Educational Staff Professional Association and the School Board of Gadsden County agree that such modifications expire upon either the expiration of the Schools of Hope Grant or upon the expiration of the funding of the grant, whichever occurs first.
6. The Gadsden County Classroom Teachers Association, the Gadsden Educational Staff Professional Association and the School Board of Gadsden County agree that if bargaining according to this MOU results in any modification to the current CBA in order to comply with Schools of Hope requirements, then such modification(s) will not operate as the status quo (it being understood that said SOH modifications shall expire at the end of the term of the current MOU unless otherwise mutually extended by the parties).
7. The parties agree that after good faith negotiations should there fail to be a fully ratified and non-imposed agreement; the parties are released from any obligation to continue participation in the Schools of Hope Grant.

The parties hereby agree to the following for the 2017-2018 and 2018-2019 school years: The parties will meet annually to address possible changes to the MOU necessary to implementing the FDOE requirements and timelines of the Schools of Hope Grant.

**I. Recruitment and Retention Supplement**

- A. The District, through the Schools of Hope grant, will provide monetary recruitment/retention incentives up to a maximum amount of five thousand dollars (\$5,000.00) to new hires who agree to be assigned to the aforementioned school and meet the following criteria.
  - a. To qualify for a recruitment incentive, the new hire must agree in writing, by means of a job offer letter provided by the District, that he/she agrees to be assigned to GWM for the 2018-2019 school year; agrees to serve the 2018-2019 school year; he/she is certified in-field by the Florida Department of Education to instruct one or more of the following grade levels: Elementary Education (K – 6), Prekindergarten/Primary Education (age 3 through Grade 3), Exceptional Student Education (ESE), and, is assigned to teach in said grade levels.



- b. A recruitment incentive of two thousand five hundred dollars (\$2,500), minus standard deductions, will be paid to the employee within thirty (30) days, who are hired on or before July 31, 2018.
- c. If the employee is hired on or after July 31, 2018, but before September 30, 2018, he/she will be eligible to receive a recruitment incentive in the amount of one thousand five hundred dollars (\$1,500), minus standard deductions. This amount will be paid, within 30 days of employment, to the employee who is newly hired.
- d. The new hire who meets all aforementioned requirements in paragraph a, and either paragraphs b or c, above, as well as all other instructional staff employed at GWM, will receive an additional incentive as noted in the table below, if he/she completes the school year as a regular employee, is reappointed for the 2019 -2020 school year, and affirms in writing his/her commitment to remain at GWM for the 2019-2020 school year. This amount will be paid within thirty (3) calendar days of June 30, 2019.

<b>Retention</b>	
<b>Instructional Staff</b>	<b>Highly Effective</b>
Core Instructional personnel (including classroom teacher, instructional specialists, ESE self-contained)	\$2,500.00
Non-core instructional personnel (instructional specialist, ESE resource teacher, media specialist)	\$1,500.00

**II. Performance Pay for Proficiency**

- A. Through the Schools of Hope grant, all instructional personnel, including instructional specialists, may earn a \$1,000 bonus if the school's 2017-2018 letter grade is a "C" or better. Instructional personnel includes employees responsible for providing or facilitating instruction in the areas of reading and or mathematics. Additional performance pay, through the Schools of Hope grant, will be paid as reflected in the chart below.

<b>Retention</b>	
<b>Performance Pay for Proficiency</b>	
<b>Instructional (Certified) Staff</b>	<b>Award</b>
Core Instructional personnel (including classroom teacher, instructional specialists, ESE self-contained) who receive at least 50% proficiency as evidenced by the English Language Arts (ELA) Florida Standards Assessment	\$1,000.00

Core Instructional personnel (including classroom teacher, instructional specialists, ESE self-contained) who receive at least 60% proficiency as evidenced by the English Language Arts (ELA) Florida Standards Assessment	\$2,500.00
Core Instructional personnel (including classroom teacher, instructional specialists, ESE self-contained) who receive at least 70% proficiency as evidenced by the English Language Arts (ELA) Florida Standards Assessment	\$3,000.00
Core Instructional personnel (including classroom teacher, instructional specialists, ESE self-contained) who receive at least 80% proficiency as evidenced by the English Language Arts (ELA) Florida Standards Assessment	\$3,500.00

- B. All bonuses will be paid within 30 days of the release of the school's letter grade.
- C. All personnel at GWM must work at least 99 days at the location to be eligible for any performance pay award bonus.
- D. Instructional paraprofessionals may earn up to a \$750.00 bonus if the school's 2017-2018 letter grade is a "C" or better. The instructional paraprofessional who earned an annual performance evaluation of effective and the school's 2017-2018 letter grade is a "C" or better, will earn a bonus of \$500.00. The instructional paraprofessional who earned an annual performance evaluation of highly effective and the school's 2017-2018 letter grade is a "C" or better, will earn a bonus of \$750.00. The individual must have earned an annual performance evaluation of either effective or highly effective.
- E. If the school's 2017 – 2018 letter grade is a "C" or better, office personnel, cafeteria staff, and custodial personnel who earned an annual performance evaluation of effective will earn a bonus of \$250.00. Aforementioned personnel who earned an annual performance evaluation of highly effective will earn a bonus of \$500.00 if the 2017 – 2018 letter grade is a "C" or better.

**III. Definitions**

- 1. Recruitment is defined as instructional personnel who are new to GWM. Instructional personnel who transfer from an existing position within the Gadsden County School District will qualify for recruitment incentives if they have a VAM score of Effective or higher.

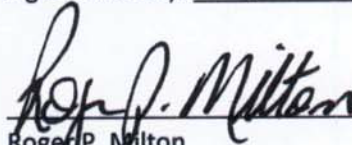
2. All recruitment, retention and performance bonus amounts will be paid in a separate check from an employee's regularly scheduled payroll distribution and will be taxed according to the IRS regulations.
3. Other rewards/incentives/stipends that are already in place for professional development, continuing education units and additional certification shall be utilized as enhancements to the aforementioned supplements if they are annually met.
4. All performance pay disputes and evaluations will be resolved through the CBA grievance process.
5. Teachers, where applicable, are defined in accordance with the GCCTA master contract. Non-instructional personnel are defined in accordance with the GESPA master contract.

**IV. Personnel Exempt from Financial Incentives**

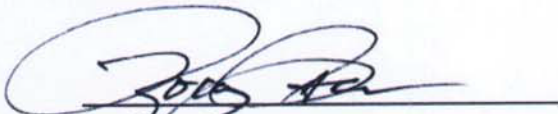
1. All substitute personnel
2. Itinerant teachers who workday or work week is primarily at a location other than GWM

Gadsden County School District

Signed this day: April 24, 2018



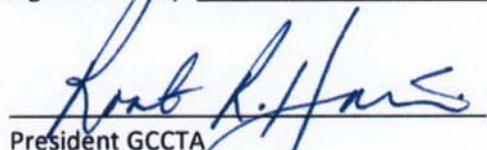
Roger P. Milton  
Superintendent



Rocky Pace  
Chief Negotiator

Gadsden County Classroom Teachers Association

Signed this day: April 24, 2018

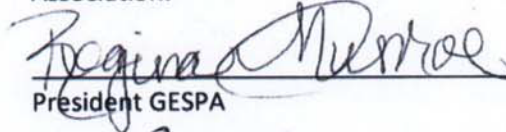


President GCCTA

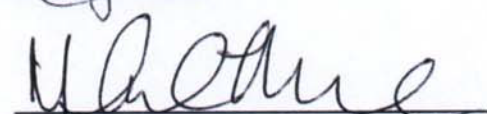


Bargaining Chair, GCCTA

Gadsden Educational Staff Profession Association:



President GESPA



Bargaining Chair, GESPA

## APPENDIX C PROFESSIONAL DEVELOPMENT

### Support Staff Professional Development Incentive

- A. An employee is eligible to receive a one-time Support Staff Professional Development Incentive of \$500 upon satisfaction of the following conditions:
  - a. Is currently serving in a full-time position in the GESPA bargaining unit and has permanent status;
  - b. Has received a "Meets Expectation" evaluation or higher for the most recent evaluation period;
  - c. Submits the required documentation of completion of each non-required job-related training to their immediate Supervisor or their designee, who inputs the course/training and the completed credits into a district database within 60 days; and
  - d. Notifies the district office when the full 75 hours have been completed
    - i. It is the individual employee's responsibility to keep copies of all documentation of completed training
    - ii. All training must be job-related and ~~pre~~-approved by the employee's supervisor
    - iii. Eligible training is defined as:
- B. Support Staff Professional Development Incentives are limited to one every two (2) years and no more than four (4) in the employee's career with the district
- C. Any professional development earned in excess of the 75 hours may be carried forward to count toward the next two (2) year period
- D. Credit will be granted for the following activities:
  - a. Personal enrichment to enhance the understanding of a work assignment or prepare an employee for advancement
  - b. Any training provided by a state agency or a worksite that is not required training for a position to remain valid or continuing education required for a specific position
  - c. Professional development offered by GESPA, FEA, NEA, and AFT through online training that relates to non-instructional employee positions
- E. Credit will not be granted for the following:
  - a. Special assignments for which an employee receives compensation
  - b. Coursework required for renewing a professional credential for the purpose of continuing current employment.

**SUMMARY SHEET**

**RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA**

**AGENDA ITEM NO.** 8f

**DATE OF SCHOOL BOARD MEETING:** **March 24, 2020**

**TITLE OF AGENDA ITEM:** Education Partnership Agreement:  
Panhandle Are Educational Professional Development Center and  
The Gadsden County School Board

**DIVISION:**

X This is a CONTINUATION of a current project, grant, etc.

**PURPOSE AND SUMMARY OF ITEM:**

Inservice Program for adding an endorsement in Reading to a Florida Educator's Certificate.

**FUND SOURCE:** N/A

**AMOUNT:** N/A

**PREPARED BY:** Ella-Mae Petersen-Daniel 

**POSITION:** Director, Professional Learning

---

**INTERNAL INSTRUCTIONS TO BE COMPLETED BY PREPARER**

       Number of ORIGINAL SIGNATURES NEEDED by preparer.

**SUPERINTENDENT'S SIGNATURE:** page(s) numbered \_\_\_\_\_

**CHAIRMAN'S SIGNATURE:** pages(s) numbered \_\_\_\_\_

**GADSDEN COUNTY PUBLIC SCHOOLS**  
**INSERVICE PROGRAM**  
**FOR ADDING AN ENDORSEMENT IN**  
**READING K-12**  
**TO A FLORIDA EDUCATOR'S CERTIFICATE**

**Prepared by**  
**The Panhandle Area Educational Consortium**  
**2019**



*Advancing Schools and Communities for Student Success*  
*Every Student Every Day!*

**John T. Selover, Executive Director**  
**Professional Development Center**  
**753 West Boulevard**  
**Chipley, Florida 32428**  
**Phone: (850) 638-6131**

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## **I. PROGRAM TITLE:**

Panhandle Area Educational Consortium Reading Endorsement Add-on Plan K-12.

## **II. PROGRAM RATIONALE AND PURPOSE:**

Florida is a state with a strong educational history of leading the nation. From the beginning, Florida, assisted with the national state-led initiative effort coordinated by the National Governors Association Center for Best Practices (NGA Center) and the Council of Chief State School Officers (CCSSO) with the purpose to provide a clear and consistent framework for the understanding of learning--the knowledge and skills--which should occur to prepare our children for college and the workforce. Through careful and purposeful analysis, the Florida Standards were developed. The Florida Standards are aligned with college and work expectations that requires the rigor and application of knowledge, which exemplifies higher order thinking and skills in a clear and consistent manner. The Florida Standards requires increasing the complexity level of the texts Florida's K-12 students read and are exposed too. It is anticipated that many students previously proficient with features of text will be stretched beyond their capacity when faced with the more complex texts called for by the standards.

The purpose and mission of PAEC provides ideal positioning for the development of highly qualified teachers who are skilled in supporting all students to achieve at high levels. The fourteen member districts look to PAEC to provide exemplary professional development and rely on PAEC to develop and maintain their Master Inservice PAEC's Reading Endorsement Add-on Plan delivery's through the PAEC online courses, traditional face-to-face delivery and/or a blended model of online and Face-to-Face coursework; which is all managed through the electronic Professional Development Connections (the ePDC).

The PAEC Reading Endorsement Add-on Plan program will be an integral part of the focus on preparing all educators to assist all learners to be successful readers. The PAEC Reading Endorsement Add-on Plan has been carefully designed to meet the needs of these 14 diverse districts by providing a series of tracks, or courses of study, embedding a variety of delivery options to meet the required competencies. Each track ensures coverage of the specific indicators for each competency. The provision of various modes of delivery will ensure that all teachers in all PAEC member districts will have easy and equitable access to the opportunity to complete their reading endorsement in a timely manner. PAEC believes this matrix of exemplary professional development in the reading competencies will empower educators to select and commit to curriculum that will move them into defined and demonstrable competence as accomplished practitioners of reading instruction.

The 2019 comparison to 2018 FSA ELA by grade band reading data for PAEC's fourteen districts indicate percentages that have increased, fluctuated and decreased across 3-10 grade bands. Three of PAEC's districts, Calhoun, Wakulla and Walton consistently score higher than the state averages for all grade bands, with only two districts slightly below (1% and 4%) the state average in a grade band. Jackson's 9-10 grade students in 2018 scored 1% less than the state's 53%, increasing to the state's average in 2019, Liberty's 3-5 grade students scored 52%, 4% below the state's in 2018; yet, surpassed the state average in 2019 by 3%, scoring 60%. PAEC's seven remaining district FAMU-DRS, Franklin, Gadsden, Holmes, Jefferson, Madison and Taylor scored below the state averages across all grade bands. These percentages ranged greatly from highest at 55% to lowest at 26%. (See table below)



## 2019 Comparison to 2018 FSA ELA by Grade

District Number	District Name	Grades 3-10 FSA English Language Arts % Level 3 or Above		Grades 3-5 FSA English Language Arts % Level 3 or Above		Grades 6-8 FSA English Language Arts % Level 3 or Above		Grades 9-10 FSA English Language Arts % Level 3 or Above	
		2018	2019	2018	2019	2018	2019	2018	2019
00	STATEWIDE	54%	55%	56%	57%	53%	54%	53%	54%
07	CALHOUN	60%	61%	58%	60%	61%	61%	62%	65%
74	FAMU-DRS	40%	48%	38%	48%	40%	46%	44%	49%
19	FRANKLIN	40%	40%	40%	47%	41%	37%	36%	34%
20	GADSDEN	34%	36%	37%	40%	33%	35%	28%	29%
23	GULF	51%	49%	48%	47%	56%	49%	51%	54%
30	HOLMES	50%	52%	52%	55%	48%	49%	50%	51%
32	JACKSON	57%	57%	62%	60%	54%	56%	52%	54%
33	JEFFERSON	34%	32%	38%	34%	29%	32%	37%	26%
39	LIBERTY	57%	61%	52%	60%	56%	59%	64%	65%
40	MADISON	43%	40%	47%	45%	41%	40%	39%	32%
62	TAYLOR	44%	49%	48%	54%	46%	48%	31%	39%
65	WAKULLA	62%	60%	62%	65%	65%	58%	56%	57%
66	WALTON	60%	62%	63%	65%	60%	60%	57%	61%
67	WASHINGTON	52%	53%	58%	58%	50%	51%	48%	47%

**Note:** Each district will remain the authorizing body for approval of individual Reading courses for endorsement, certification or to meet professional development requirements.

### III. PROGRAM CONTENT/CURRICULUM:

The competencies for this Reading Endorsement Add-on Plan are aligned with Text Rule 6A-4.0292

#### **A. Florida's Reading Endorsement Competencies:**

**Competency 1: Foundations of Reading Instruction** – Teachers will develop substantive understanding of six components of reading as a process: comprehension, oral language, phonological awareness, phonics, fluency, and vocabulary.

**Competency 2: Application of Research-Based Instructional Practices** – Teachers will scaffold student learning by applying the principles of research-based reading instruction and integrating the six components of reading. Teachers will engage in the systematic problem-solving process.

**Competency 3: Foundations of Assessment** -- Teachers will understand how to select and administer appropriate assessments and analyze data to inform reading instruction to meet the needs of all students. Teachers will engage in the systematic problem-solving process.

**Competency 4: Foundations and Applications of Differentiated Instruction** -- Teachers will have a broad knowledge of students from differing profiles in order to understand and apply research-based instructional practices by differentiating process, product, and context. Teachers will engage in the systematic problem-solving process.

**Competency 5: Demonstration of Accomplishment (Reading Practicum)** -- Teachers will, through a culminating practicum, demonstrate knowledge of the components of reading, as well as assessments and data analysis, to implement a comprehensive research-based reading plan of instruction for all students. Teachers will engage in the systematic problem-solving process.

#### **B. Florida's Professional Development Protocol:**

The content and delivery of each course will be grounded in scientifically based research and aligned with the National Staff Development Council Standards and Planning, Delivery, Follow-up and Evaluation Standards contained in Florida's Professional Development Evaluation System Protocol. The source for this protocol is the Florida Department of Education.

There are certain activities in which program participants will need to engage to meet these objectives. The following activities will need to be included in the Practicum:

- Working with students from among diverse groups of elementary and secondary readers:
  - Students reading at grade level and above
  - Response to Intervention (RtI) students
  - Students with disabilities
  - English Language Learners
  - Struggling readers
- Assessment of student(s) to generate comprehensive student reading profiles
- Analysis of data
- Applications of appropriate instructional practices and resources to meet reading needs of students
- Application of multisensory instruction and strategies
- Tracking student reading development over time
- Use of differentiated reading instruction to meet needs of students with varying reading needs, including students with dyslexia

#### **C. Specialization/Professional Studies:**

The Reading Endorsement is intended solely for teachers who currently hold or are eligible for a valid Florida Professional Educator's Certificate based on a bachelor's or higher degree.

#### **D. Nationally Recognized Guidelines:**

Guidelines other than those listed by the State for the K-12 Reading Endorsement (including Specialization Requirements for Certification in Reading, Grades K-12; Certification requirements for Exceptional Student Education; Specialization Requirements for Adding English for Speakers of Other Languages) were consulted. Such guidelines include Standards for Reading Professionals, International Reading Association; National Institute for Literacy's *Using Research and Reason in Education*; National Institute for Child Health and Development's *Preventing Reading Difficulties in Young Children*; the National Reading Panel's, *Teaching Children to Read*; *Reading Between the Lines*; Florida State Standards for English Language Arts and Literacy in History/Social Studies, Science and Technical Subjects, and ACT, Inc. These guidelines were used in the selection of topics of study; program design; specific course content, objectives, and necessary resources; and professional development activities, including clinical activities.

As a result, each course will be grounded in research which addresses the five components of reading as a process; appropriate uses of assessment for screening, diagnosis and progress monitoring; as well as, research based initial instruction and immediate intensive intervention. Articles and/or portions of these documents as well as other resources listed in each competency's bibliography will be used for group study and individual reflective writing and application.

### **IV. INSTRUCTIONAL DESIGN AND DELIVERY**

In order to adequately prepare participants for a successful practicum experience, the instructional design provides a framework that scaffolds participants from the foundational competencies, throughout the application competencies and supervised practicum of Competency 5. This is accomplished by progressively increasing requirements for investigative activities as

participants move through the five competencies. Elements of the investigative activities will include a learning community approach and collaborative action research as appropriate to the competencies culminating in a supervised practicum.

Investigative activities will be chosen from a menu by the component instructor based on the Florida Standards, participant knowledge, instructional assignment and assessed student needs. Investigative activities may include, but are not limited to:

- clinical interviews with students
- administration of reliable and valid reading assessments
- data analysis
- identification of source of student reading difficulties
- identification of performance indicators that may indicate dyslexia
- application of appropriate instructional practices
- application of multisensory instruction, strategies and activities
- case studies
- lesson study
- article review(s)
- individual study and research-based practice reports
- reflection after viewing research-based practice
- guided inquiry
- collegial discussions
- observations of best practices
- on-going personal reflection
- presentations

Investigative activities will be aligned with evaluation requirements thus providing meaningful and authentic demonstration of the specific indicators for each competency.

**A. Instructional Strands:**

**Guiding Principle:** Teachers will understand and teach reading as an ongoing strategic process resulting in students comprehending diverse text. Teachers will understand how writing, listening, and speaking support the teaching of reading, and how family involvement supports student achievement in reading. Teachers will understand that all students have instructional needs and apply the systematic problem-solving process: use data to accurately identify a problem, analyze the problem to determine why it is occurring, design and implement instruction/interventions, and evaluate the effectiveness of instruction/interventions. Teachers will understand that the problem-solving process is recursive, ongoing, and utilized for effective instructional decision-making.

**2020 Reading Endorsement Competencies**

Component #	Inservice Points	Component Title
01-013-006	60	Foundations of Reading Instruction
01-013-007	60	Applications of Research-Based Practices
01-013-008	60	Foundations of Assessment
01-013-009	60	Foundations and Applications of Differentiated Instruction
01-013-010	60	Demonstration of Accomplishment (Reading Practicum)
	<b>Total: 300</b>	

**Competencies and Performance Indicators Considered in Development of PAEC Reading Endorsement**

Competency	Performance Indicators
<p><b>1: Foundations of Reading Instruction</b></p> <p>Teachers will develop substantive understanding of six components of reading as a process: comprehension, oral language, phonological awareness, phonics, fluency and vocabulary.</p>	<p>The total inventory of Performance Indicators (A-G) satisfies Competency 1.</p> <p><b>A: Comprehension</b></p> <p>1. A.1 Understand that building oral and written language facilitates comprehension.</p> <p>1. A.2 Understand the importance of learning syntax, semantics, pragmatics, vocabulary, and text structures required for comprehension of formal written language of school, often called "academic language."</p> <p>1. A.3 Understand the impact of text upon reading comprehension (e.g., genre, readability, coherence, text structure, and text complexity).</p> <p>1. A.4 Understand how the interaction of reader characteristics, motivation, purpose of reading, and text elements impacts comprehension and student engagement.</p> <p>1. A.5 Identify cognitive targets (e.g., locate/recall; integrate/interpret; critique/evaluate) and the role of cognitive development in the construction of meaning of literary and informational texts.</p> <p>1. A.6 Understand reading as a process of constructing meaning from a wide variety of print and digital texts and for a variety of purposes.</p> <p>1. A.7 Understand the reading demands posed by domain specific texts.</p> <p>1. A.8 Understand that effective comprehension processes rely on well-developed language, strong inference making, background knowledge, comprehension monitoring and self-correcting.</p> <p>1. A.9 Understand how English language learners' linguistic and cultural background will influence their comprehension.</p> <p>1. A.10 Understand the role of formal and informal assessment of comprehension in making instructional decisions to meet individual student needs.</p> <p><b>B: Oral Language</b></p> <p>1. B.1 Understand how students' development of phonology, syntax, semantics, and pragmatics relates to comprehending written language.</p> <p>1. B.2 Understand the differences between social and academic language.</p> <p>1. B.3 Understand that writing enhances the development of oral language.</p> <p>1. B.4 Understand that the variation in students' oral language exposure and development requires differentiated instruction.</p> <p>1. B.5 Recognize the importance of English language learners home languages, and their significance for learning to read English.</p> <p>1. B.6 Understand the role of formal and informal oral language assessment to make instructional decisions to meet individual student needs.</p> <p><b>C: Phonological Awareness</b></p> <p>1. C.1 Understand phonology as it relates to language development and reading achievement (e.g., phonological processing, phonemic awareness skills, phonemic analysis and synthesis).</p> <p>1. C.2 Recognize the phonological continuum beginning with sensitivity to large and concrete units of sound (i.e., words &amp; syllables) and progressing to small and abstract units of sound (onset-rimes and phonemes).</p> <p>1. C.3 Understand that writing, in conjunction with phonological awareness, enhances reading development.</p> <p>1. C.4 Distinguish both phonological and phonemic differences in language and their applications in written and oral discourse patterns (e.g., language &amp; dialect differences).</p> <p>1. C.5 Understand how similarities and differences in sound production between English and other languages affect English language learners' reading development in English.</p> <p>1. C.6 Understand the role of formal and informal phonological awareness assessment to</p>

make instructional decisions to meet individual student needs.

**D: Phonics**

- 1. D.1 Understand that phonological units (words, syllables, onset-rimes, and phonemes) map onto orthographic units (words, rimes, letters) in alphabetic languages.
- 1. D.2 Understand sound-spelling patterns and phonics (grapheme-phoneme correspondence rules).
- 1. D.3 Understand structural analysis of words.
- 1. D.4 Understand that both oral language and writing can be used to enhance phonics instruction.
- 1. D.5 Understand the role of formal and informal phonics assessment to make instructional decisions to meet individual student needs.

**E: Fluency**

- 1. E.1 Understand that the components of reading fluency are accuracy, expression, and rate, which impact reading endurance and comprehension.
- 1. E.2 Understand that effective readers demonstrate flexibility by adjusting their reading rate to accommodate the kinds of texts they are reading in order to facilitate comprehension.
- 1. E.3 Understand the relationships among fluency, word recognition, and comprehension.
- 1. E.4 Understand that both oral language and writing enhance fluency instruction.
- 1. E.5 Understand the role of formal and informal fluency assessment to make instructional decisions to meet individual student needs.

**F: Vocabulary**

- 1. F.1 Understand the goal of receptive and expressive vocabulary instruction is the application of a student's understanding of word meanings to multiple oral and written contexts.
- 1. F.2 Understand morphology as it relates to vocabulary development (e.g., morphemes, inflectional and derivational morphemes, morphemic analysis).
- 1. F.3 Identify principles of semantics as they relate to vocabulary development (e.g., antonyms, synonyms, figurative language, etc.).
- 1. F.4 Understand the domain specific vocabulary demands of academic language.
- 1. F.5 Understand that writing can be used to enhance vocabulary instruction.
- 1. F.6 Understand the role of formal and informal vocabulary assessment to make instructional decisions to meet individual student needs.

**G: Integration of the reading components**

- 1. G.1 Identify language characteristics related to social and academic language.
- 1. G.2 Identify phonemic, semantic, and syntactic variability between English and other languages.
- 1. G.3 Understand the interdependence between each of the reading components and their effect upon reading as a process for native speakers of English and English language learners.
- 1. G.4 Understand the impact of oral language, writing, and an information intensive environment upon reading development.
- 1. G.5 Understand the importance of comprehension monitoring and self-correcting to increase reading proficiency.
- 1. G.6 Understand the role of formal and informal reading assessment to make instructional

	decisions to meet individual student needs.
<p><b>2: Applications of Research-Based Practices</b></p> <p>Teachers will scaffold student learning by applying the principles of research-based reading instruction and integrating the six components of reading. Teachers will engage in the systematic problem-solving process.</p>	<p>The total inventory of Performance Indicators (A-G) satisfies Competency 2.</p> <p><b>A: Comprehension</b></p> <p>2.A.1 Apply intentional, explicit, and systematic instructional practices for scaffolding development of higher order thinking, comprehension skills, comprehension monitoring and self-correcting (e.g., reciprocal teaching, "think aloud," etc.).</p> <p>2. A.2 Use both oral language and writing experiences to enhance comprehension.</p> <p>2. A.3 Apply appropriate instructional practices determined by the student's strengths and needs, text structure, and the reading demands of domain specific text.</p> <p>2. A.4 Provide opportunities for student extended text discussion to enhance comprehension, promote motivation and student engagement.</p> <p>2. A.5 Select narrative or informational print or digital texts that are appropriate to the comprehension instruction to be provided.</p> <p>2. A.6 Provide comprehension instruction that supports students' ability to read multiple print and digital texts and to synthesize information within, across and beyond those texts.</p> <p>2. A.7 Scaffold discussions to facilitate the comprehension of text and higher order thinking skills for students with varying English proficiency levels.</p> <p>2. A.8 Model a variety of strategic activities students can use to foster comprehension monitoring and self-correcting.</p> <p>2. A.9 Recognize, describe, and incorporate appropriate comprehension assessments to guide instruction.</p> <p><b>B: Oral Language</b></p> <p>2. B.1 Apply intentional, explicit, and systematic instructional practices for scaffolding development of oral/aural language skills (e.g., language experience approach, Socratic questioning).</p> <p>2. B.2 Create an environment where students practice appropriate social and academic language to discuss diverse texts.</p> <p>2. B.3 Recognize and apply an English language learner's home language proficiency as a foundation and strength to support the development of oral language in English.</p> <p>2. B.4 Use writing experiences to enhance oral language (e.g., interactive writing, student to teacher sentence dictation).</p> <p>2. B.5 Recognize, describe, and incorporate appropriate oral language assessments to guide instruction.</p> <p><b>C: Phonological Awareness</b></p> <p>2. C.1 Apply intentional, explicit, systematic instructional practices to scaffold development of phonological awareness. (e.g., blending and segmenting syllables, onset-rimes, and phonemes).</p> <p>2. C.2 Provide opportunities for students to use oral/aural language to enhance phonological awareness (e.g., rhyming and alliteration).</p> <p>2. C.3 Understand and apply knowledge of how variations in phonology across languages affect English language learners' reading and writing development.</p> <p>2. C.4 Use writing experiences, in conjunction with phonological instruction, to enhance reading achievement (e.g., Elkonin boxes or magnetic letters, individual response whiteboards).</p> <p>2. C.5 Recognize, describe, and incorporate appropriate phonological awareness assessments to guide instruction.</p> <p><b>D: Phonics</b></p> <p>2. D.1 Apply intentional, explicit, systematic instructional practices for scaffolding phonics development on a continuum from the individual phoneme-grapheme level through the multi-syllabic word level.</p> <p>2. D.2 Recognize and apply an English language learner's home language as a foundation</p>

	<p>and strength to support the development of phonics in English.</p> <p>2. D.3 Use oral/aural language and writing experiences to enhance phonics instruction (e.g., sentence strip words, phrases, and pocket charts).</p> <p>2. D.4 Recognize, describe, and incorporate appropriate phonics assessments to guide instruction.</p> <p><b>E: Fluency</b></p> <p>2. E.1 Apply intentional, explicit, systematic instructional practices to scaffold accuracy, expression, rate, and reading endurance (e.g., paired reading, repeated reading, echo reading, reader's theater, etc.).</p> <p>2. E.2 Use oral/aural language and writing experiences to enhance fluency (e.g., poetry charts, song lyrics).</p> <p>2. E.3 Recognize, describe, and incorporate appropriate fluency assessments to guide instruction.</p> <p><b>F: Vocabulary</b></p> <p>2. F.1 Apply intentional, explicit, systematic instructional practices to scaffold vocabulary and concept development (e.g., shared reading, semantic mapping, etc.).</p> <p>2. F.2 Provide for continual integration, repetition, and meaningful use of domain specific vocabulary to address the demands of academic language.</p> <p>2. F.3 Incorporate vocabulary instruction through analogies (e.g., cognates, Greek and Latin roots).</p> <p>2. F.4 Provide an environment that supports wide reading of print and digital texts, both informational and literary, to enhance vocabulary.</p> <p>2. F.5 Incorporate instructional practices that develop authentic uses of English to assist English language learners in learning academic vocabulary and content.</p> <p>2. F.6 Use oral/aural language and writing experiences to enhance vocabulary (e.g., interactive word walls, word sorts, word charts for secondary).</p> <p>2. F.7 Use multiple methods of vocabulary instruction (e.g. multiple contexts, examples and non-examples, elaborations, etc.).</p> <p>2. F.8 Recognize, describe, and incorporate appropriate vocabulary assessments to guide instruction.</p> <p><b>G: Integration of the reading components</b></p> <p>2. G.1 Apply comprehensive instructional practices, including writing experiences that integrate the reading components.</p> <p>2. G.2 Identify instructional practices to develop students' metacognitive skills in reading (e.g., text coding such as INSERT, two column notes).</p> <p>2. G.3 Use resources and research-based practices that create information intensive environments (e.g., diverse classroom libraries, inquiry reading).</p> <p>2. G.4 Use research-based guidelines for selecting literature and domain specific print and digital text appropriate to students' age, interests and reading proficiency (e.g., young adult literature, informational texts).</p> <p>2. G.5 Demonstrate understanding of similarities and differences between home language and second language reading development.</p> <p>2. G.6 Triangulate data from appropriate reading assessments to guide instruction.</p>
<p><b>3: Foundations of Assessment</b></p> <p><b>Teachers will</b></p>	<p>3.1 Understand and apply measurement concepts and characteristics of reading assessments.</p> <p>3.2 Understand the purposes of various informal assessments (e.g., informal reading inventories, analyzing writing samples) including an emphasis on matching</p>

<p><b>understand how to select and administer appropriate assessments and analyze data to inform reading instruction to meet the needs of all students. Teachers will engage in the systematic problem-solving process.</b></p>	<p>reader to text.</p> <p>3.3 Understand the purpose of various formal assessments including the differences between norm-referenced and criterion-referenced assessments and how to interpret data reports.</p> <p>3.4 Understand the meaning of test reliability, validity, and standard error of measurement and describe major types of derived scores from standardized tests.</p> <p>3.5 Demonstrate knowledge of the characteristics, administration, and interpretation of both quantitative and qualitative instructional assessments (to include each of the following: screening, progress monitoring, diagnosis and outcome measures).</p> <p>3.6 Analyze data to identify trends that indicate adequate progress in student reading development.</p> <p>3.7 Understand how to use data within a systematic problem-solving process to differentiate instruction, intensify intervention and meet the needs of all students. (e.g., grouping practices, appropriate curriculum materials).</p> <p>3.8 Identify appropriate criteria for selecting materials to include in portfolios for monitoring student progress over time.</p> <p>3.9 Identify interpretive issues that may arise when assessments in English are used to measure reading proficiency in English language learners.</p> <p>3.10 Identify appropriate assessments and accommodations for monitoring reading progress of all students.</p> <p>3.11 Identify and implement appropriate and allowable accommodations as specified in the Individual Education Plan or 504 Plan when assessing students with disabilities in the area of reading.</p>
<p><b>4: Foundations and Applications of Differentiated Instruction</b></p> <p><b>Teachers will have a broad knowledge of students from differing profiles in order to understand and apply research-based instructional practices by differentiating process, product, and context. Teachers will engage in the systematic problem-solving process.</b></p>	<p>4.1 Understand and apply knowledge of socio-cultural, socio-political and psychological variables to differentiate reading instruction for all students.</p> <p>4.2 Understand the stages of English language acquisition for English language learners and differentiate reading instruction for students at different levels of English language proficiency.</p> <p>4.3 Understand and apply current theories of second language acquisition to differentiate instruction for English language learners of diverse backgrounds and various levels of prior education.</p> <p>4.4 Identify factors impeding student reading development in each of the reading components or the integration of these components.</p> <p>4.5 Recognize how characteristics of both language and cognitive development impact reading proficiency.</p> <p>4.6 Recognize the characteristics of proficient readers to more effectively differentiate instruction.</p> <p>4.7 Compare language, cognitive, and reading acquisition of different age groups (primary, intermediate, secondary levels) and abilities.</p> <p>4.8 Select and use developmentally appropriate materials that address sociocultural and linguistic differences.</p> <p>4.9 Plan for instruction that utilizes increasingly complex print and digital text, embeds assessment, includes scaffolding, and provides re-teaching when necessary for individuals and small groups.</p> <p>4.10 Differentiate reading instruction for English language learners with various levels of first language literacy.</p> <p>4.11 Scaffold instruction for students having difficulty in each of the components of reading.</p> <p>4.12 Implement a classroom level plan for monitoring student reading progress and</p>



	<p>differentiating instruction.</p> <p>4.13 Monitor student progress and use data to differentiate instruction for all students.</p> <p>4.14 Implement research-based practices in comprehension, oral language, phonological awareness, phonics, fluency and vocabulary to differentiate instruction for all students. 4.15 Implement research-based instructional practices for developing students' higher order thinking.</p> <p>4.16 Implement research-based instructional practices for developing students' ability to read critically.</p> <p>4.17 Implement research-based instructional practices using writing to develop students' comprehension of text.</p> <p>4.18 Implement appropriate and allowable instructional accommodations as specified in the Individual Education Plan or 504 Plan when differentiating instruction for students with disabilities.</p> <p>4.19 Modify assessment and instruction for students with significant cognitive disabilities while maintaining high expectations for achievement that reflect appropriate levels of access to general education instruction.</p>
<p><b>5: Demonstration of Accomplishment (Reading Practicum)</b></p> <p><b>Teachers will, through a culminating practicum, demonstrate knowledge of the components of reading, as well as assessments and data analysis, to implement a comprehensive research-based reading plan of instruction for all students. Teachers will engage in the systematic problem-solving process.</b></p>	<p>5.1 Use assessment and data analysis to monitor student progress and guide instruction over time to ensure an increase in student learning.</p> <p>5.2 Demonstrate research-based instructional practices for facilitating reading comprehension.</p> <p>5.3 Demonstrate research-based instructional practices for developing oral/aural language development.</p> <p>5.4 Demonstrate research-based instructional practices for developing students' phonological awareness.</p> <p>5.5 Demonstrate research-based instructional practices for developing phonics skills and word recognition.</p> <p>5.6 Demonstrate research-based instructional practices for developing reading fluency and reading endurance.</p> <p>5.7 Demonstrate research-based instructional practices for developing both academic and domain specific vocabulary.</p> <p>5.8 Demonstrate research-based instructional practices to facilitate students' monitoring and self-correcting in reading.</p> <p>5.9 Demonstrate research-based comprehension instructional practices for developing students' higher order thinking to enhance comprehension.</p> <p>5.10 Demonstrate research-based instructional practices for developing students' ability to read critically.</p> <p>5.11 Demonstrate differentiation of instruction for all students utilizing increasingly complex print and digital text.</p> <p>5.12 Demonstrate skill in assessment and instruction with English language learners from diverse backgrounds and at varying English proficiency levels.</p> <p>5.13 Create an information intensive environment that includes print and digital text.</p> <p>5.14 Use a variety of instructional practices to motivate and engage students in reading.</p> <p>5.15 Demonstrate intentional, explicit, systematic writing instruction as it relates to the ability to read written language.</p>

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**Option 1:  
PAEC Add-on Program**

	Track 1	Track 2	Track 3	Track 4	Track 5
<b>Competency</b>	<b>PAEC (Face-to-Face Online and Blended)</b>	<b>Beacon Educator</b>	<b>NEFEC</b>	<b>Colleges and University Course Offerings</b>	<b>Individual Design</b>
<b>1</b>	Foundations of Reading Instruction	Foundations of Reading Instruction	Instructional Foundations of Language & Reading	See Overview of College Courses, pg.	Individual teachers, under the direction of appropriate district staff, will have the opportunity to choose portions of Tracks 1-4, College courses, FLDOE approved reading endorsement courses that meet the competency requirements, and/or, the PDA Module #8: <i>Differentiating Reading Instruction for Students: Making It Explicit</i> -Competency 4, to meet the requirements for an add-on reading endorsement.
<b>2</b>	Application of Research-Based Practices	Foundations of Research-Based Practices	Applications of Research-Based Practices	See Overview of College Courses, pg.	
<b>3</b>	Foundations of Assessment	Foundations of Assessment	Foundations & Applications for Teachers & Principals	See Overview of College Courses, pg.	
<b>4</b>	Foundations and Applications of Differentiated Instruction	Foundations of Differentiation	Foundations & Applications of Differentiated Instruction	See Overview of College Courses, pg.	
<b>5</b>	Demonstration of Accomplishment (Reading Practicum)	Demonstration of Accomplishment	Demonstration of Accomplished Practices in Reading	See Overview of College Courses, pg.	
All Reading Endorsement Candidates in all tracts will complete a <b>Supervised Practicum</b> that requires documentation of mastery of Competency 5 indicators.					

In order to meet the diverse needs of the fourteen member districts of PAEC, five tracks of study have been designed. The above matrix of Competencies and Tracks defines the mode of delivery for each competency within each course of study. Any other training offered and approved by the Florida Department of Education will count toward Track 5 of the PAEC Reading Endorsement Add-on Plan. (See Option 1, Track 5 above)

**Option 2**  
**College Coursework**

Requires official transcripts showing completion of the reading courses outlined below.

State Board Rule 6A-4.0163 requires completion of fifteen (15) semester hours in reading coursework based upon scientifically based reading research with a focus on both the prevention and remediation of reading difficulties to include:

- a. 6 semester hours in understanding reading as a process of student engagement in both fluent decoding of words and construction of meaning;
- b. 3 semester hours in the administration and interpretation of instructional assessments to include screening, diagnosis, and progress monitoring with purposes of prevention, identification, and remediation of reading difficulties;
- c. 3 semester hours in understanding how to prescribe, differentiate instruction, and utilize appropriate strategies and materials based upon scientifically based reading research in order to address the prevention, identification, and remediation of reading difficulties in order to increase reading performance; and
- d. 3 semester hours in a supervised practicum to obtain practical experience in increasing the reading performance of a student(s) with the prescription and utilization of appropriate strategies and materials based upon scientifically based reading research to address the prevention, identification, and remediation of reading difficulties.

PAEC READING ENDORSEMENT OVERVIEW OF COLLEGE COURSES

Competency 1 Foundations of Language and Cognition (60 pts)	Competency 2 Foundations of Research-Based Practices (60 pts)	Competency 3 Foundations of Assessment (60 pts)	Competency 4 Foundations and Applications of Differentiated Instruction (30/30 pts)	Competency 5 Demonstration of Accomplishment (60)
<p><u>UWF:</u>  <u>Undergraduate:</u>  <ul style="list-style-type: none"> <li>▪ LAE 3314 - Literacy for the Emergent Learner</li> </ul> <u>Graduate:</u>  <ul style="list-style-type: none"> <li>▪ RED 6116 - Foundations of Early Literacy</li> </ul> </p>	<p><u>Undergraduate:</u>  <ul style="list-style-type: none"> <li>▪ RED 3310 – Literacy Instruction for the Intermediate Learner</li> </ul> <u>Graduate:</u>  <ul style="list-style-type: none"> <li>▪ RED 6060 – Foundations of Middle and Secondary Literacy</li> </ul> </p>	<p><u>Undergraduate:</u>  <ul style="list-style-type: none"> <li>▪ RED 4542c – Assessment and Differentiated Instruction in Reading (Competency 3 and 4)</li> </ul> <u>Graduate:</u>  <ul style="list-style-type: none"> <li>▪ RED 5515 – Classroom Reading Assessments</li> </ul> </p>	<p><u>Undergraduate:</u>  <ul style="list-style-type: none"> <li>▪ RED 4542c – Assessment and Differentiated Instruction in Reading (Competency 3 and 4)</li> </ul> <u>Graduate:</u>  <ul style="list-style-type: none"> <li>▪ RED 6240 – Differentiating Instruction</li> </ul> </p>	<p><u>Undergraduate*</u>  <u>Graduate:</u>  <ul style="list-style-type: none"> <li>▪ RED 6866 – Practicum in the Teaching of Reading</li> </ul> </p>
<p><u>FSU</u>  <u>Undergraduate:</u>  <ul style="list-style-type: none"> <li>▪ RED 4310 – The Development and Assessment of Emergent Reading and Writing</li> </ul> <u>Elem. Education Graduate:</u>  <ul style="list-style-type: none"> <li>▪ RED 5109 Reading Lang. Arts MS and others:</li> <li>▪ RED 5109 (Same)</li> </ul> </p>	<p><u>Undergraduate:</u>  <ul style="list-style-type: none"> <li>▪ RED 4510 – Teaching Reading in the Elementary School</li> </ul> <u>Elem. Education Graduate:</u>  <ul style="list-style-type: none"> <li>▪ RED 5147 – Foundations of Developmental Reading</li> </ul> <u>Reading Lang. Arts MS and others:</u>  <ul style="list-style-type: none"> <li>▪ RED 5147 (Same) – Foundations of Developmental Reading</li> </ul> </p>	<p><u>Elem. Education Undergraduate and Graduate:</u>  <ul style="list-style-type: none"> <li>▪ EDE 4302 – Beginning Fall 2014)</li> </ul> <u>Reading Lang. Arts MS and others:</u>  <ul style="list-style-type: none"> <li>▪ RED 5466</li> </ul> </p>	<p><u>Elem. Education Undergraduate and Graduate:</u>  <ul style="list-style-type: none"> <li>▪ EDE 4316 - Differentiating Instruction in Reading</li> </ul> <u>Reading Lang. Arts MS and others:</u>  <ul style="list-style-type: none"> <li>▪ EEX 5258</li> </ul> </p>	<p><u>Elem. Education Undergraduate and Graduate:</u>  <ul style="list-style-type: none"> <li>▪ RED 4941 – Practicum in Reading ESOL</li> </ul> <u>Reading Lang. Arts MS and others:</u>  <ul style="list-style-type: none"> <li>▪ RED 5947</li> </ul> </p>
<p><u>Flagler College</u>  <ul style="list-style-type: none"> <li>▪ EEL 301 – Elementary Reading Instruction (may be used for Competency 1 and 2, but not both)</li> </ul> </p>	<p> <ul style="list-style-type: none"> <li>▪ EEL 301 – Elementary Reading Instruction (may be used for Competency 1 and 2, but not both)</li> <li>▪ EEL 455 – Diagnostic Reading (Integrates Competencies 1, 2 and 3, EEL 455 and EEL 301 cover Competencies 1, 2 and 3)</li> </ul> </p>	<p> <ul style="list-style-type: none"> <li>▪ EEL 455 – Diagnostic Reading (Integrates Competencies 1, 2 and 3, must be taken for either Competencies 2 and 3)</li> </ul> </p>	<p>Combination of six courses to complete Competency 4.</p>	<p><u>Undergraduate*</u></p>
<p><u>Chipola College</u>  <ul style="list-style-type: none"> <li>▪ RED 3009 – Early and Emergent Literacy</li> </ul> </p>	<p> <ul style="list-style-type: none"> <li>▪ RED 3360 – Teaching Reading in the Middle/Secondary School</li> <li>▪ RED 3311 – Teaching Reading in the Intermediate Grades</li> </ul> </p>	<p> <ul style="list-style-type: none"> <li>▪ RED 4312 – Integration of Assessment into Classroom Reading</li> </ul> </p>	<p> <ul style="list-style-type: none"> <li>▪ RED 4519 – Diagnostic and Instructional Interventions in Reading</li> </ul> </p>	<p><u>Undergraduate*</u></p>

\*Requires Internship Prerequisites coursework.

## **B. TRAINING COMPONENTS:**

**COMPONENT NUMBER: 01-013-006**

- **FOUNDATIONS OF READING INSTRUCTION**  
Foundations of Reading Instruction: Reading Endorsement Competency 1
- **DEPARTMENT SPONSOR**  
PAEC Professional Development Center
- **COMPONENT COORDINATOR**  
PAEC Professional Development Center Coordinator
- **ELIGIBLE PARTICIPANTS**  
Administrators  
Instructional Staff  
School Related Personnel
- **POINT RANGE**  
60 points
- **PRIMARY PURPOSE**  
Add-on Certification and/or Re-Certification
- **PRIMARY DELIVERY METHOD**  
Varied
- **FOLLOWUP**  
Varied
- **OVERALL GOAL/GENERAL OBJECTIVE**  
One of five component offerings leading to reading endorsement (K-12), this component is designed to provide teachers seeking reading endorsement with an understanding of reading as a process of student engagement in both fluent decoding of words and construction of meaning.

Upon successful completion of this component, participants seeking reading endorsement will be able to demonstrate a theoretical and functional knowledge to complete all course work through small group, on-site demonstration and projects, portfolios, products, and participation in supervised practice with peers, with a substantive understanding of six components of reading as a process: comprehension, oral language, phonological awareness, phonics, fluency, vocabulary, integration of the reading components and demonstration of mastery of all required indicators as determined valid measures and will complete any other assessment procedures required by the instructor as referenced in the Matrix found on page 33 of this document.

### **SPECIFIC OBJECTIVES:**

#### **A: Comprehension**

The participant will:

1. Understand that building oral and written language facilitates comprehension
2. Understand the importance of learning syntax, semantics, pragmatics, vocabulary, and text structures required for comprehension of formal written language of school, often called "academic language."
3. Understand the impact of text upon reading comprehension (e.g., genre, readability, coherence, text structure, and text complexity)
4. Understand how the interaction of reader characteristics, motivation, purpose of reading, and text elements impacts comprehension and student engagement
5. Identify cognitive targets (e.g., locate/recall; integrate/interpret; critique/evaluate) and the role of cognitive development in the construction of meaning of literary and informational texts
6. Understand reading as a process of constructing meaning from a wide variety of print and digital texts and for a variety of purposes

7. Understand the reading demands posed by domain specific texts
8. Understand that effective comprehension processes rely on well-developed language, strong inference making, background knowledge, comprehension monitoring and self-correcting
9. Understand how English language learners' linguistic and cultural background will influence their comprehension
10. Understand the role of formal and informal assessment of comprehension in making instructional decisions to meet individual student needs

### **B: Oral Language**

The participant will:

1. Understand how the students' development of phonology, syntax, semantics, and pragmatics relates to comprehending written language
2. Understand the differences between social and academic language
3. Understand that writing enhances the development of oral language
4. Understand that the variation in students' oral language exposure and development requires differentiated instruction
5. Recognize the importance of English language learners home languages, and their significance for learning to read English
6. Understand the role of formal and informal oral language assessment to make instructional decisions to meet individual student needs

### **C: Phonological Awareness**

The participant will:

1. Understand phonology as it relates to language development and reading achievement (e.g., phonological processing, phonemic awareness skills, phonemic analysis and synthesis)
2. Recognize the phonological continuum beginning with sensitivity to large and concrete units of sound (i.e., words & syllables) and progressing to small and abstract units of sound (onset-rimes and phonemes)
3. Understand that writing, in conjunction with phonological awareness, enhances reading development
4. Distinguish both phonological and phonemic differences in language and their applications in written and oral discourse patterns (e.g., language & dialect differences)
5. Understand how similarities and differences in sound production between English and other languages affect English language learners' reading development in English
6. Understand the role of formal and informal phonological awareness assessment to make instructional decisions to meet individual student needs

### **D: Phonics**

The participant will:

1. Understand that phonological units (words, syllables, onset-rimes, and phonemes) map onto orthographic units (words, rimes, letters) in alphabetic languages
2. Understand sound-spelling patterns and phonics (grapheme-phoneme correspondence rules)
3. Understand structural analysis of words
4. Understand that both oral language and writing can be used to enhance phonics instruction
5. Understand the role of formal and informal phonics assessment to make instructional decisions to meet individual student needs

### **E: Fluency**

The participant will:

1. Understand that the components of reading fluency are accuracy, expression, and rate which impact reading endurance and comprehension
2. Understand that effective readers demonstrate flexibility by adjusting their reading rate to accommodate the kinds of texts they are reading in order to facilitate comprehension
3. Understand the relationships among fluency, word recognition, and comprehension
4. Understand that both oral language and writing enhance fluency instruction
5. Understand the role of formal and informal fluency assessment to make instructional decisions to meet individual student needs

## **F: Vocabulary**

The participant will:

1. Understand the goal of receptive and expressive vocabulary instruction is the application of a student's understanding of word meanings to multiple oral and written contexts
2. Understand morphology as it relates to vocabulary development (e.g., morphemes, inflectional and derivational morphemes, morphemic analysis)
3. Identify principles of semantics as they relate to vocabulary development (e.g., antonyms, synonyms, figurative language, etc.)
4. Understand the domain specific vocabulary demands of academic language
5. Understand that writing can be used to enhance vocabulary instruction
6. Understand the role of formal and informal vocabulary assessment to make instructional decisions to meet individual student needs

## **G: Integration of the reading components**

The participant will:

1. Identify language characteristics related to social and academic language
2. Identify phonemic, semantic, and syntactic variability between English and other languages
3. Understand the interdependence between each of the reading components and their effect upon reading as a process for native speakers of English and English language learners
4. Understand the impact of oral language, writing, and an information intensive environment upon reading development
5. Understand the importance of comprehension monitoring and self-correcting to increase reading proficiency

### **ACTIVITIES:**

In the knowledge acquisition portion of Competency 1, participants will be actively engaged in research-based content designed to inform participants of substantive knowledge of language structure, function and cognition for each of the five major components of the reading process.

The investigative activities will be chosen from a menu by the component instructor, based on participant knowledge, instructional assignment, assessed student needs and delivery mode. Investigative activities may be collaborative and include, but are not limited to:

- lesson plan design
- article(s) review
- individual study and report on research-based practice
- reflective writing after viewing research-based practice
- conduct clinical interview(s) to begin a portfolio of reading profiles
- case studies
- collegial discussions
- practice of best practices
- data analysis
- presentations

Investigative activities will be aligned with evaluation requirements thus providing meaningful and authentic demonstration of the specific indicators for this competency.

### **EVALUATION:**

1. Participant understanding of these practices will be assessed through oral/written reflection, participant products, quizzes, discussion groups and case study participation.
2. Evidence of changes in instructional practice will be collected through evidence of implementation and participants work products throughout the course.
3. Changes in student performance will be evaluated based on student work products and student growth analysis from assignments and assessments.

Participant's work will be reviewed, as appropriate, by course facilitators, district staff and/or departmental leaders to evaluate the effectiveness of the professional development on changing. **Note: Specific identifiers are aligned to evaluation measures and can be found in the Matrix on page 33 of this document.**



**COMPONENT NUMBER 01-013-007**

• **APPLICATION OF RESEARCH-BASED INSTRUCTIONAL PRACTICES**

Application of Research-Based Practices: Reading Endorsement Competency 2

• **DEPARTMENT SPONSOR**

PAEC Professional Development Center

• **COMPONENT COORDINATOR**

PAEC Professional Development Center Coordinator

• **ELIGIBLE PARTICIPANTS**

Administrators  
Instructional Staff  
School Related Personnel

• **POINT RANGE**

60 points

• **PRIMARY PURPOSE**

Add-on Certification and/or Re-Certification

• **PRIMARY DELIVERY METHOD**

Varied

• **FOLLOWUP**

Varied

• **OVERALL GOAL/GENERAL OBJECTIVE**

One of five component offerings leading to reading endorsement (K-12), this component is designed to provide teachers seeking reading endorsement with an understanding of reading as a process of student engagement in both fluent decoding of words and construction of meaning.

Upon successful completion of this component, participants seeking reading endorsement will be able to demonstrate a theoretical and functional knowledge to complete all course work through small group, on-site demonstration and projects, portfolios, products, and participation in supervised practice with peers, with a substantive understanding of six components of reading as a process: comprehension, oral language, phonological awareness, phonics, fluency, vocabulary, integration of the reading components and demonstration of mastery of all required indicators as determined valid measures and will complete any other assessment procedures required by the instructor as referenced in the Matrix found on page 33 of this document.

**SPECIFIC OBJECTIVES:**

**A: Comprehension**

The participant will:

1. Apply intentional, explicit, and systematic instructional practices for scaffolding development of higher order thinking, comprehension skills, comprehension monitoring and self-correcting (e.g., reciprocal teaching, "think aloud," etc.)
2. Use both oral language and writing experiences to enhance comprehension
3. Apply appropriate instructional practices determined by the student's strengths and needs, text structure, and the reading demands of domain specific text
4. Provide opportunities for student extended text discussion to enhance comprehension, promote motivation and student engagement
5. Select narrative or informational print or digital texts that are appropriate to the comprehension instruction to be provided
6. Provide comprehension instruction that supports students' ability to read multiple print and digital texts and to synthesize information within, across and beyond those texts
7. Scaffold discussions to facilitate the comprehension of text and higher order thinking skills for students with varying English proficiency levels
8. Model a variety of strategic activities students can use to foster comprehension monitoring and self-correcting
9. Recognize, describe, and incorporate appropriate comprehension assessments to guide instruction

**B: Oral Language**

The participant will:

1. Apply intentional, explicit, and systematic instructional practices for scaffolding development of oral/aural language skills (e.g., language experience approach, Socratic questioning)
2. Create an environment where students practice appropriate social and academic language to discuss diverse texts
3. Recognize and apply an English language learner's home language proficiency as a foundation and strength to support the development of oral language in English
4. Use writing experiences to enhance oral language (e.g., interactive writing, student to teacher sentence dictation)
5. Recognize, describe, and incorporate appropriate oral language assessments to guide instruction

**C: Phonological Awareness**

The participant will:

1. Apply intentional, explicit, systematic instructional practices to scaffold development of phonological awareness. (e.g., blending and segmenting syllables, onset-rimes, and phonemes)
2. Provide opportunities for students to use oral/aural language to enhance phonological awareness (e.g., rhyming and alliteration)
3. Understand and apply knowledge of how variations in phonology across languages affect English language learners' reading and writing development
4. Use writing experiences, in conjunction with phonological instruction, to enhance reading achievement (e.g., Elkonin boxes or magnetic letters, individual response whiteboards).
5. Recognize, describe, and incorporate appropriate phonological awareness assessments to guide instruction

**D: Phonics**

The participant will:

1. Apply intentional, explicit, systematic instructional practices for scaffolding phonics development on a continuum from the individual phoneme-grapheme level through the multi-syllabic word level
2. Recognize and apply an English language learner's home language as a foundation and strength to support the development of phonics in English
3. Use oral/aural language and writing experiences to enhance phonics instruction (e.g., sentence strip words, phrases, and pocket charts)
4. Recognize, describe, and incorporate appropriate phonics assessments to guide instruction

**E: Fluency**

The participant will:

1. Apply intentional, explicit, systematic instructional practices to scaffold accuracy, expression, rate, and reading endurance (e.g., paired reading, repeated reading, echo reading, reader's theater, etc.)
2. Use oral/aural language and writing experiences to enhance fluency (e.g., poetry charts, song lyrics)
3. Recognize, describe, and incorporate appropriate fluency assessments to guide instruction

**F: Vocabulary**

The participant will:

1. Apply intentional, explicit, systematic instructional practices to scaffold vocabulary and concept development (e.g., shared reading, semantic mapping, etc.)
2. Provide for continual integration, repetition, and meaningful use of domain specific vocabulary to address the demands of academic language
3. Incorporate vocabulary instruction through analogies (e.g., cognates, Greek and Latin roots)
4. Provide an environment that supports wide reading of print and digital texts, both informational and literary, to enhance vocabulary
5. Incorporate instructional practices that develop authentic uses of English to assist English language learners in learning academic vocabulary and content
6. Use oral/aural language and writing experiences to enhance vocabulary (e.g., interactive word walls, word sorts, word charts for secondary)
7. Use multiple methods of vocabulary instruction (e.g. multiple contexts, examples and non-examples, elaborations, etc.)

8. Recognize, describe, and incorporate appropriate vocabulary assessments to guide instruction

### **G: Integration of the reading components**

The participant will:

1. Apply comprehensive instructional practices, including writing experiences, that integrate the reading components
2. Identify instructional practices to develop students' metacognitive skills in reading (e.g., text coding such as INSERT, two column notes)
3. Use resources and research-based practices that create information intensive environments (e.g., diverse classroom libraries, inquiry reading)
4. Use research-based guidelines for selecting literature and domain specific print and digital text appropriate to students' age, interests and reading proficiency (e.g., young adult literature, informational texts)
5. Demonstrate understanding of similarities and differences between home language and second language reading development
6. Triangulate data from appropriate reading assessments to guide instruction.

### **ACTIVITIES:**

In the knowledge acquisition portion of Competency 1, participants will be actively engaged in research-based content designed to inform participants of substantive knowledge of language structure, function and cognition for each of the five major components of the reading process.

The investigative activities will be chosen from a menu by the component instructor, based on participant knowledge, instructional assignment, assessed student needs and delivery mode. Investigative activities may be collaborative and include, but are not limited to:

- lesson plan design
- article(s) review
- individual study and report on research-based practice
- reflective writing after viewing research-based practice
- conduct clinical interview(s) to begin a portfolio of reading profiles
- case studies
- collegial discussions
- practice of best practices
- data analysis
- presentations

Investigative activities will be aligned with evaluation requirements thus providing meaningful and authentic demonstration of the specific indicators for this competency.

### **EVALUATION:**

1. Participant understanding of these practices will be assessed through oral/written reflection, participant products, quizzes, discussion groups and case study participation.
2. Evidence of changes in instructional practice will be collected through evidence of implementation and participants work products throughout the course.
3. Changes in student performance will be evaluated based on student work products and student growth analysis from assignments and assessments.

Participant's work will be reviewed, as appropriate, by course facilitators, district staff and/or departmental leaders to evaluate the effectiveness of the professional development on changing.

**Note: Specific identifiers are aligned to evaluation measures and can be found in the Matrix on page 33 of this document.**

**COMPONENT NUMBER 01-013-008**

• **TITLE: FOUNDATION OF ASSESSMENT**

Foundation of Assessment: Reading Endorsement Competency 3

• **DEPARTMENT SPONSOR**

PAEC Professional Development Center

• **COMPONENT COORDINATOR**

PAEC Professional Development Center Coordinator

• **ELIGIBLE PARTICIPANTS**

Administrators  
Instructional Staff  
School Related Personnel

• **POINT RANGE**

60 points

• **PRIMARY PURPOSE**

Add-on Certification and/or Re-Certification

• **PRIMARY DELIVERY METHOD**

Varied

• **FOLLOWUP**

Varied

• **OVERALL GOAL/GENERAL OBJECTIVE**

One of five component offerings leading to reading endorsement (K-12), this component is designed to provide teachers seeking reading endorsement with an understanding of reading as a process of student engagement in both fluent decoding of words and construction of meaning.

Upon successful completion of this component, participants seeking reading endorsement will be able to demonstrate a theoretical and functional knowledge to complete all course work through small group, on-site demonstration and projects, portfolios, products, and participation in supervised practice with peers, with a substantive understanding of six components of reading as a process: comprehension, oral language, phonological awareness, phonics, fluency, vocabulary, integration of the reading components and demonstration of mastery of all required indicators as determined valid measures and will complete any other assessment procedures required by the instructor as referenced in the Matrix found on page 33 of this document.

**SPECIFIC OBJECTIVES:**

The participant will:

1. Understand and apply measurement concepts and characteristics of reading assessments.
2. Understand the purposes of various informal assessments (e.g., informal reading inventories, analyzing writing samples) including an emphasis on matching reader to text.
3. Understand the purpose of various formal assessments including the differences between norm-referenced and criterion-referenced assessments and how to interpret data reports.
4. Understand the meaning of test reliability, validity, and standard error of measurement and describe major types of derived scores from standardized tests.
5. Demonstrate knowledge of the characteristics, administration, and interpretation of both quantitative and qualitative instructional assessments (to include each of the following: screening, progress monitoring, diagnosis and outcome measures).
6. Analyze data to identify trends that indicate adequate progress in student reading development.
7. Understand how to use data within a systematic problem-solving process to differentiate instruction, intensify intervention and meet the needs of all students. (e.g., grouping practices, appropriate curriculum materials).
8. Identify appropriate criteria for selecting materials to include in portfolios for monitoring student progress over time.

9. Identify interpretive issues that may arise when assessments in English are used to measure reading proficiency in English language learners.
10. Identify appropriate assessments and accommodations for monitoring reading progress of all students.
11. Identify and implement appropriate and allowable accommodations as specified in the Individual Education Plan or 504 Plan when assessing students with disabilities in the area of reading.

#### **ACTIVITIES:**

In the knowledge acquisition portion of Competency 3, participants will be actively engaged in research-based content designed to inform participants of the knowledge and skills needed to demonstrate an understanding of the role of assessments in guiding reading instruction and instructional decision making. Topics will include different types of assessments, psychometric standards for reliability and validity, the role of assessment in planning and validating instruction and the appropriate use of instructional reading assessments

The investigative activities will be chosen from a menu by the component instructor, based on participant knowledge, instructional assignment and assessed student needs. In addition to reviewing FSA data, participants will use a variety of screening, diagnosis and progress monitoring instruments to assess student progress throughout this component. These assessments may include, but are not limited to, Florida Assessment for Instruction in Reading (F.A.I.R.), Stanford 9, Woodcock Johnson, Slosson Oral Reading Test, Diagnostic Assessment of Reading (DAR), Multiple Measures 2<sup>nd</sup> Edition, DIBELS 8<sup>th</sup> Edition, Standardized Test for Assessment in Reading (STAR) and Peabody Picture Vocabulary. Student outcome measures gleaned from component assessment will be included as part of the program evaluation data. Investigative activities may be collaborative and include, but are not limited to:

- article review
- field experience log
- clinical interview(s) to enhance a portfolio of reading profiles
- individual study and report on a reliable and valid assessment instrument
- reflection after viewing the administration of a reliable and valid screening, diagnostic or progress monitoring assessment instrument
- administration of assessments necessary for conducting a case studies of a struggling reader(s)
- analysis and interpretation of state and district student test data to inform instruction
- analysis and interpretation of formal and informal student assessment data including screening, diagnosis, progress monitoring and outcome measures to inform instruction

Investigative activities will be aligned with evaluation requirements thus providing meaningful and authentic demonstration of the specific indicators for this competency.

#### **EVALUATION:**

1. Participant understanding of these practices will be assessed through oral/written reflection, participant products, quizzes, discussion groups and case study participation.
2. Evidence of changes in instructional practice will be collected through evidence of implementation and participants work products throughout the course.
3. Changes in student performance will be evaluated based on student work products and student growth analysis from assignments and assessments.

Participant's work will be reviewed, as appropriate, by course facilitators, district staff and/or departmental leaders to evaluate the effectiveness of the professional development on changing.

**Note: Specific identifiers are aligned to evaluation measures and can be found in the Matrix on page 33 of this document.**

**COMPONENT NUMBER 01-013-009**

**1. FOUNDATIONS AND APPLICATIONS OF DIFFERENTIATED INSTRUCTION**

Foundations and Applications of Differentiated Instruction: Reading Endorsement Competency 4

**2. DEPARTMENT SPONSOR**

PAEC Professional Development Center

**3. COMPONENT COORDINATOR**

PAEC Professional Development Center Coordinator

**4. ELIGIBLE PARTICIPANTS**

Administrators  
Instructional Staff  
School Related Personnel

**5. POINT RANGE**

60points

**6. PRIMARY PURPOSE**

Add-on Certification and/or Re-Certification

**7. PRIMARY DELIVERY METHOD**

Varied

**8. FOLLOWUP**

Varied

**9. OVERALL GOAL/GENERAL OBJECTIVE**

One of five component offerings leading to reading endorsement (K-12), this component is designed to provide teachers seeking reading endorsement with an understanding of reading as a process of student engagement in both fluent decoding of words and construction of meaning.

Upon successful completion of this component, participants seeking reading endorsement will be able to demonstrate a theoretical and functional knowledge to complete all course work through small group, on-site demonstration and projects, portfolios, products, and participation in supervised practice with peers, with a substantive understanding of six components of reading as a process: comprehension, oral language, phonological awareness, phonics, fluency, vocabulary, integration of the reading components and demonstration of mastery of all required indicators as determined valid measures and will complete any other assessment procedures required by the instructor as referenced in the Matrix found on page 33 of this document.

**SPECIFIC OBJECTIVES:**

The participant will:

1. Understand and apply knowledge of socio-cultural, socio-political and psychological variables to differentiate reading instruction for all students.
2. Understand the stages of English language acquisition for English language learners and differentiate reading instruction for students at different levels of English language proficiency.
3. Understand and apply current theories of second language acquisition to differentiate instruction for English language learners of diverse backgrounds and various levels of prior education.
4. Identify factors impeding student reading development in each of the reading components or the integration of these components.
5. Recognize how characteristics of both language and cognitive development impact reading proficiency.
6. Recognize the characteristics of proficient readers to more effectively differentiate instruction.
7. Compare language, cognitive, and reading acquisition of different age groups (primary, intermediate, secondary levels) and abilities.
8. Select and use developmentally appropriate materials that address sociocultural and linguistic differences.
9. Plan for instruction that utilizes increasingly complex print and digital text, embeds assessment, includes scaffolding, and provides re-teaching when necessary for individuals and small groups, that includes multisensory instruction and strategies.

10. Differentiate reading instruction for English language learners with various levels of first language literacy.
10. Scaffold instruction for students having difficulty in each of the components of reading that includes multisensory instruction and strategies.
11. Implement a classroom level plan for monitoring student reading progress and differentiating instruction.
12. Monitor student progress and use data to differentiate instruction for all students.
13. Implement research-based practices in comprehension, oral language, phonological awareness, phonics, fluency and vocabulary to differentiate instruction for all students.
14. Implement research-based instructional practices for developing students' higher order thinking.
15. Implement research-based instructional practices for developing students' ability to read critically.
16. Implement research-based instructional practices using writing to develop students' comprehension of text.
17. Implement appropriate and allowable instructional accommodations as specified in the Individual Education Plan or 504 Plan when differentiating instruction for students with disabilities, including dyslexia.
18. Modify assessment and instruction for students with significant cognitive disabilities, including dyslexia, while maintaining high expectations for achievement that reflect appropriate levels of access to general education instruction.

#### **ACTIVITIES:**

Participants will be actively engaged in research-based content designed to develop broad knowledge of students from differing profiles, including students with disabilities, ELLs, and students from diverse populations and to apply research-based instructional methodology to prevent reading difficulties and promote acceleration of reading progress for struggling students. Topics will include different student reading profiles across the grade levels, flexible grouping for differentiated instruction, diverse student populations and instructional accommodations.

The investigative activities for these competencies will be chosen from a menu by the component instructor based on participant knowledge, instructional assignment and assessed student needs. Investigative activities may be collaborative and include, but are not limited to:

- lesson plan for instructional differentiation based on data analysis
- differentiated instruction demonstration
- article(s) review
- field experience log
- individual study and report on an effective practice for instructional differentiation
- reflection after viewing model of effective instruction for ELLs, ESE or RtI students
- clinical interview(s) to enhance a portfolio of reading profiles
- case study of a struggling reader(s)
- student tutoring

Investigative activities will be aligned with evaluation requirements thus providing meaningful and authentic demonstration of the specific indicators for this competency.

#### **EVALUATION:**

1. Participant understanding of these practices will be assessed through oral/written reflection, participant products, quizzes, discussion groups and case study participation.
2. Evidence of changes in instructional practice will be collected through evidence of implementation and participants work products throughout the course.
3. Changes in student performance will be evaluated based on student work products and student growth analysis from assignments and assessments.

Participant's work will be reviewed, as appropriate, by course facilitators, district staff and/or departmental leaders to evaluate the effectiveness of the professional development on changing.

**Note: Specific identifiers are aligned to evaluation measures and can be found in the Matrix on page 33 of this document.**

**COMPONENT NUMBER 01-013-010**

- **DEMONSTRATION OF ACCOMPLISHMENT (READING PRACTICUM)**  
Demonstration of Accomplishment (Reading Practicum): Reading Endorsement Competency 5
- **DEPARTMENT SPONSOR**  
PAEC Professional Development Center
- **COMPONENT COORDINATOR**  
PAEC Professional Development Center Coordinator
- **ELIGIBLE PARTICIPANTS**  
Administrators  
Instructional Staff  
School Related Personnel
- **POINT RANGE**  
60 points
- **PRIMARY PURPOSE**  
Add-on Certification and/or Re-Certification
- **PRIMARY DELIVERY METHOD**  
Supervised Practicum
- **FOLLOWUP**  
Varied
- **OVERALL GOAL/GENERAL OBJECTIVE**  
One of five component offerings leading to reading endorsement (K-12), this component is designed to provide teachers seeking reading endorsement with an understanding of reading as a process of student engagement in both fluent decoding of words and construction of meaning.

Upon successful completion of this component, participants seeking reading endorsement will be able to demonstrate a theoretical and functional knowledge to complete all course work through small group, on-site demonstration and projects, portfolios, products, and participation in supervised practice with peers, with a substantive understanding of six components of reading as a process: comprehension, oral language, phonological awareness, phonics, fluency, vocabulary, integration of the reading components and demonstration of mastery of all required indicators as determined valid measures and will complete any other assessment procedures required by the instructor as referenced in the Matrix found on page 33 – 63 of this document.

**SPECIFIC OBJECTIVES**

The participant will:

1. Use assessment and data analysis to monitor student progress and guide instruction over time to ensure an increase in student learning.
2. Demonstrate research-based instructional practices for facilitating reading comprehension.
3. Demonstrate research-based instructional practices for developing oral/aural language development.
4. Demonstrate research-based instructional practices for developing students' phonological awareness.
5. Demonstrate research-based instructional practices for developing phonics skills and word recognition.
6. Demonstrate research-based instructional practices for developing reading fluency and reading endurance.
7. Demonstrate research-based instructional practices for developing both academic and domain specific vocabulary.
8. Demonstrate research-based instructional practices to facilitate students' monitoring and self-correcting in reading.
9. Demonstrate research-based comprehension instructional practices for developing students' higher order thinking to enhance comprehension.
10. Demonstrate research-based instructional practices for developing students' ability to read critically.
11. Demonstrate differentiation of instruction for all students utilizing increasingly complex print and digital text.



12. Demonstrate skill in assessment and instruction with English language learners from diverse backgrounds and at varying English proficiency levels.
13. Create an information intensive environment that includes print and digital text.
14. Use a variety of instructional practices to motivate and engage students in reading.
15. Demonstrate intentional, explicit, systematic writing instruction as it relates to the ability to read written language.

#### **ACTIVITIES:**

##### **Practicum**

In order to meet the Practicum requirement for the Florida Reading Endorsement Add-on Plan, the Panhandle Area Educational Consortium [PAEC] proposes the following Practicum process for all five tracks of its Reading Endorsement program. Research indicates the coaching process is imperative within professional development for embedding reading research and its research-based strategies into daily instructional practices. For this reason, peer coaching will be an integral and ongoing component of the Practicum throughout the entire reading endorsement process.

Each practicum participant will be supervised by highly qualified district selected experts in scientifically research-based reading instruction. The District practicum supervisor must have reading certification or reading endorsement.

#### **District Practicum Supervisor Requirements**

- Meet with each participant to process learning upon completion of each lesson observation or video. Each meeting date should be documented. Verify that appropriate indicators are being demonstrated through each observed or video-taped lesson and corresponding lesson plan and reflection.
- Conduct 6 cohort sessions with practicum participants.
- Evaluate clinical portfolio for each of the following:
  - Appropriate use and interpretation of instructional assessments including identifying student poor performances that may indicate dyslexia
  - Appropriate application of reading instruction based on assessment data results that utilizes multisensory instruction and strategies
  - Application of appropriate differentiated instruction to meet diverse student reading needs
  - Appropriate use of research-based reading resources, best practices and strategies
  - Appropriate and sufficient amount and quality of items included in clinical portfolio
  - Collective evidence of student reading gains.

#### **Practicum Participant Requirements**

This is a supervised practicum experience which will transpire over the course of 10-12 weeks (with a minimum of 36 hours student contact time) in a deliberate manner. Practicum participants will apply knowledge and skills learned in competencies 1-4 in a classroom setting with diverse and struggling readers. Sessions may be in the context of a summer reading camp, an after-school tutoring program, a clinical session within the school day or other settings as appropriate. Throughout this time frame and under the guidance of a practicum supervisor with reading expertise, the participant will engage in clinical experiences and will be responsible for completing and adhering to the requirements as outlined below in order to demonstrate all K-12 Reading Endorsement Competency 5 indicators (5.1, 5.2, 5.3, 5.4, 5.5, 5.6, 5.7, 5.8, 5.9, 5.10, 5.11, 5.12, 5.13, 5.14, 5.15)

The supervised practicum will require:

- Documentation that Competencies 1-4 and/or college courses have been completed prior to beginning Competency 5.
- Participation in Clinical Cohort sessions during which participants function as members of a learning community. The activities of the learning community will include:
  - Reviewing and responding to the required videoed or observed lessons
  - Maintaining a log of activities conducted during Competency 5
  - Reading and reviewing professional texts and articles
  - Developing full-page reflection papers on the required lessons
  - Reviewing case study information
  - Developing focus-lessons based on formal and/or informal assessments
  - Investigating and reviewing theories of learning.
- A minimum of 36 hours of contact practice with students. This may be a small group of three to five students.
- Completion of a total of six lesson plans focusing on each of the following areas of reading:

- Comprehension – This lesson must include a 'writing in response to reading' and/or a 'Comprehension Instructional Sequence' component
- Oral language
- Phonological Awareness
- Phonics
- Fluency
- Vocabulary
- Use of multisensory instruction and strategies
- Integration of reading components
- A video/observation (or combination as predetermined with the district contact and mentor) of each of the above lessons being taught to a class or group of students.
- A one-page reflection on each of the above lessons.
- Maintenance of a log of activities that pertain to Competency 5. Must include evidence of a print-rich environment and an explanation of how this is maintained for students.
- Completion of three case studies focusing on three students of varying reading abilities.

Practicum participants will progress through Competency 5 as a cohort group, when possible. Clinical portfolios will be submitted to the district professional development coordinator. The professional development coordinator will determine portfolio content to be maintained at the district.

#### **Practicum Portfolios**

As evidence of completion of Competency 5, each participant's practicum portfolio will include the following documentation:

- Documentation of successful completion of competencies 1-5 (Certificates of completion for each competency and/or college transcripts are required)
- Videotapes
- Rubrics
- Observation checklist
- All lesson plans and accompanying reflections
- Completed case studies
- All clinical cohort class reflections
- K-12 Reading Endorsement Competency 5 indicators (completed by clinical mentor)
- Collective evidence of student reading gains (case study, skill group or whole class)
- Copy of Form B-1 and PAEC Reading Endorsement transcript.

At the discretion of the professional development coordinator and practicum participant, lesson plans and practices may be transferred to a CD-ROM or flash drive for submission.

#### **Additional Approved Competency 5 Practicum:**

Participants may also complete a district approved practicum, including college coursework.

#### **EVALUATION:**

- A checklist documenting mastery of performance indicators completed during clinical conferences
- A practicum portfolio

Specific identifiers are aligned to evaluation measures and can be found in the Matrix on pages 33 of this document.

#### **Instructors:**

Instructors are reading specialists employed by the consortium's fourteen different District County School Boards, persons contracted by an institution of higher education, and/or highly qualified staff members, or other instructors approved by the district. An instructor must hold a master's degree in reading or have completed the five required courses for the reading endorsement; should have a minimum of three years successful experience as a reading specialist or in a comparable reading/leadership position, must have successful experience as a district trainer, and must have a recommendation from his/her principal and from the Professional Development Office Supervisor responsible for elementary or secondary reading.

## **V. COMPLETION REQUIREMENTS:**

### **A) Program Completion**

Satisfactory completion of individual components for add-on certification purposes may be demonstrated through:

- 1) The instructor's verification of successful demonstration of all applicable competencies and products within the component.
- 2) Completion all course requirements satisfactorily as outlined in the course design evaluation criteria. Participants will earn the 60 in-service points in each component for a total of 300 in-service points.
- 3) Equivalent or higher-level college credit from an accredited institution of higher education may be used to satisfy component requirements. Approved reading endorsement three credit hour college courses can be converted to in-service points. An official college transcript, from a college or university, documenting successful completion of a course from the catalog description, of which establishes a reasonable equivalence to the District component must be provided by the applicant to the District Office of Certification.
- 4) Course completion will be verified by the District Office of Certification, upon submission of the appropriate materials.

### **B) Competency Demonstration**

1. All those attempting to add the reading endorsement to their Florida's Educator's Certificates must earn a minimum of 300 in-service points by successfully completing the prescribed set of in-service components including the demonstration of all competencies required for the endorsement or through documented equivalent means. Competency demonstration will be done through projects, products, tests, classroom demonstrations, and/or portfolios; however, procedures for evaluation of competency achievement will vary depending on the nature of the competency as described in the course design evaluation criteria.
2. The evaluation of mastery at or above an 80% level will be determined by direct observation according to a checklist of performance indicators and the submission of a clinical portfolio and maintain a learning log throughout the training program.
3. Upon completion of all five components or the college course equivalent, participants will submit a completed form to the District Office of Certification for final approval and program verification.

### **C) Competency Verification**

Verification of competencies other than through the procedures stated above is not an option for this add-on reading endorsement program.

## **VI. PROGRAM EVALUATION:**

As the Add-on Reading Endorsement Program becomes an integral part of district efforts to continually improve K-12 reading instruction, it is critical that this program is regularly reviewed for efficiency, effectiveness and impact. In addition to analyzing the evaluation data holistically, the results from each of the 5 delivery formats (tracks) will be analyzed and compared in order to determine relative effectiveness in varying contexts. While descriptive and qualitative data are useful for making operational improvements, the ultimate criterion for evaluation must be, "What effect is the Add-on Reading Endorsement Program having on student achievement?" In order to continually improve program quality, the evaluation will be ongoing and aligned with the Professional Development Evaluation Protocol as outlined in the following matrix:

	Evaluation Questions	PDEP Standard	Data Sources	Instrumentation	When?
Delivery	How many teachers satisfactorily completed the coursework required for Reading Endorsement?	1.2.2	Program Instructors	Descriptive data: Number and percentage of completers Number and percentage of out-of-field	Each semester
	Did the instruction use learning strategies appropriate to the intended goal that apply knowledge of human learning including modeling of effective teaching practices?	1.2.3	Participant perception	Feedback Survey	Annually
	Was the content relevant to the needs of classroom teachers?		Participant perception	Feedback Survey	Annually
Follow-up/ Implementation	Were acquired skills and knowledge transferred to classroom practice?	1.3.1	Administrator observation	Checklist of Competencies	Ongoing with annual data compilation beginning Y 2
	Were program participants offered ongoing support through school-based learning community activities, coaching, and/or web-based resources?	1.3.2 1.3.3	Program Participants School /District Professional Development Plans	Focus Group Document Review	Annually
Impact	What were the documented changes in student performance related to this training?	1.4.2	Student achievement documentation	Student Achievement Data including FSA Reading scores, assessments from Multiple Measures, 2 <sup>nd</sup> Edition and district assessments that may include DIBELS, Stanford 9, Woodcock Johnson, Slosson Oral Reading Test, F.A.I.R. Assessments and/or Peabody Picture Vocabulary.	Annually beginning Y 2
	Have program participants been encouraged and supported in conducting scientific-based research that studies student achievement as it relates to instructional practices developed through reading endorsement coursework?	1.4.4 3.4.3	Participant artifacts & self- report	Review of Scientific-based Research Projects	Annually beginning Y 2
Management/Cost Effectiveness	Are records of Component completion kept in an accurate and up-to-date manner?	3.2.7	District Artifacts	Review of Administrative Records	Annually
	Has the program been reviewed for cost effectiveness?	3.4.6			
	Have evaluation results been used to improve program design and implementation if indicated?	3.4.5			

## **VII. MANAGEMENT:**

### **A. Candidate Application and Admission**

The district staff development director will be responsible for application, admission, and final verification of completion of the Add-on Reading Endorsement Program and submission of appropriate paperwork to the Florida Department of Education.

Participants must be currently employed by a PAEC member school district. In order to be admitted, an individual must hold a valid temporary or professional certificate based on a bachelor's degree or higher with certification in an academic, degreed vocational, administrative or specialty class coverage. Candidates with temporary certificates must show proof of eligibility for a Professional Certificate prior to the district's verification of completion of the program. All candidates for the Add-on Reading Endorsement must fill out an initial application for the program, using Form A, found in Appendix II, and submit it to the District Office of Certification.

### **B. Attendance Requirements**

Component instruction will take place for indicated hours at convenient sites during or after school hours during the school year and throughout summers. Attendance at all sessions is mandatory. Reading Endorsement candidates must participate in each in-service component for the appropriate time requirement to receive the total in-service credit awarded by the component. In case of serious illness or extreme emergency, the instructor will work with the student to ensure that required class hours are satisfied.

### **C. Transfer and Utilization of Credit**

Equivalent or higher-level college credit from an accredited institution of higher education may be used to satisfy component requirements. College courses approved by the state and aligned with a complete competency can be converted to in-service points. An official college transcript must be provided by the applicant to the district Office of Certification. The district will use Form C, found in Appendix II, to transfer college credit.

It is the responsibility of the district to review a transcript for recentness of credit for reading courses that meet competency indicators. See Florida Department of Education – Approved Options for Obtaining Reading Certification.

In-service credit earned in other school districts may be applied to the reading endorsement program provided that the component completion was earned as part of an approved Add-on Reading Endorsement Program.

### **D. Certification of Completion**

When a participant completes all Reading Endorsement Requirements, thereby demonstrating mastery of competencies and specific indicators, the participant will notify the district designated Reading Endorsement contact. The following forms will then be submitted to appropriate district staff for approval:

1. Form B-1,
2. Form C, if college credit is applicable,
3. Form D (Competency 5 Practicum Checklist or Official Transcript Verification), and
4. **ePDC** Reading Endorsement Transcript

The PAEC appropriate staff will verify completion and return to the district office for submission to the Florida Department of Education.

## **VIII SCHOOL BOARD APPROVAL:**

The Reading Add-on Endorsement Plan will be submitted to the individual school districts for approval.

## C. Matrix: Gadsden County in Collaboration with PAEC

### FOUNDATIONAL READING SKILL: COMPREHENSION

Course Number and Name of Course	Required Course Reading(s)	Indicator Code	Specific Indicator	Curriculum Study Assignment at Indicator Level with Built-In Formative Assessment	Summative Assessment
<p><b>Competency 1:</b> Foundations of Reading Instruction Teachers will develop substantive understanding of six components of reading as a process: comprehension, oral language, phonological awareness, phonics, fluency, and vocabulary.</p> <p><b>Competency 2:</b> Application of Research-Based Instructional Practices Teachers will scaffold student learning by applying the principles of research-based reading instruction and integrating the six components of reading. Teachers will engage in the systematic problem-solving process.</p>					
<p>01-013-006: Foundations of Reading Instruction</p> <p>01-013-007: Application of Research-Based Instructional Practices</p>	<p><b>Article:</b> <i>Young Children's Oral Language Development - Reading Rockets</i></p> <p><b>Article:</b> <i>Role of Early Oral Language in Literacy Development</i> by Shanahan &amp; Lonigan</p> <p><b>Teaching Reading Sourcebook, 3<sup>rd</sup> Edition</b> by Bill Honig, Linda Diamond &amp; Linda Gutlohn. Chpt 1: <i>The Big Picture</i></p> <p><b>Teaching Reading Sourcebook:</b> <i>Introduction to Comprehension VI</i> - Pgs. 609 – 617</p>	1.A.1	Understand that building oral and written language facilitates comprehension.	<p><b>1.A.1 - Curriculum Study Assignment:</b></p> <p>*View PowerPoint</p> <p>*Read Chpt 1: <i>The Big Picture</i>. Identify key points.</p> <p>*Read Articles: <i>Young Children's Oral Language Development and Role of Early Oral Language in Literacy Development</i></p> <p><b>1.A.1: Formative Assessment:</b> <b>Complete Teaching Reading Sourcebook Study Guide: The Big Picture</b></p> <p>-Discuss the two articles with peers to develop an <b>understanding</b> of:</p> <p>*Define oral language</p> <p>*Describe the key findings for oral language and reading.</p> <p>*Identification of examples of expressive and receptive language &amp; the characteristics of language components.</p> <p><b>Answer Questions:</b> <i>What is oral language, elements, purpose and teaching of oral language? Discuss activities that build oral and written language to support comprehension.</i></p>	<p>* <b>Facilitator chooses which summative assessment participants complete.</b></p> <p><b>Methods of demonstration:</b></p> <ul style="list-style-type: none"> <li>* Facilitator Observations</li> <li>* Peer Discussions</li> <li>* Ongoing Case Study</li> <li>* Portfolio:</li> </ul> <p>1) <b>Summarize</b> key points of readings. 2) <b>Participants</b> complete an ongoing case study: 1.A.1: Provide examples for oral and written language, 3-5, that demonstrate an <b>understanding</b> of strategies that build both and aids comprehension. 3) <b>Reflect</b> upon current practice and how to provide more authentic opportunities for language experience and text discussion in daily instruction.</p>

<p><i>Bringing Words to Life</i> by Beck, McKeown &amp; Kugan</p> <p><b>Article: Specific Ways to Use Webb's Depth of Knowledge in Class</b> – Marcus Guide/Prodigy</p> <p><b>HO: Cognitive Task Levels</b></p> <p><i>I Read It, But I Don't Get It</i> - Cris Tovani: Chpt 2:</p> <p><b>Article: Making It Stick: Memorable Strategies to Enhance Learning – Reading Rockets</b></p> <p><b>Article: Multisensory Teaching – Meaning &amp; Importance – Reading Rockets</b></p> <p><b>Teaching Reading Sourcebook: Pgs. 634 -635 &amp; 682 – 684</b></p>	<p>2.A.2</p> <p>2.A.4</p>	<p>Use both oral language and writing experiences to enhance comprehension.</p> <p>Provide opportunities for student extended text discussion to enhance comprehension, promote motivation and student engagement.</p>	<p><b>2.A.2 &amp; 2.A.4: Curriculum Study Assignment:</b></p> <p><b>*View PowerPoint</b></p> <p><b>*Read: Teaching Reading Sourcebook: Introduction to Comprehension VI</b></p> <p><b>*Review Rubrics:</b> Written and Oral language, K-5 &amp; LAFS Speaking and Listening Standards.</p> <p><b>2.A.2 &amp; 2.A.4: Formative Assessment:</b></p> <p><b>*Complete Teaching Reading Sourcebook Study Guide:</b> Introduction to Comprehension VI</p> <p><b>*Discuss with peers:</b> 1) how to ask questions or create conversation starters to incorporate language into daily instruction 2) importance of structuring class discussions 3) appropriate multisensory strategies to enhance language 4) appropriate supports for ELL students.</p> <p><b>*Participants design and teach a lesson</b> that uses both oral language and written experiences to enhance comprehension using best instructional practices.</p>	<p><b>- Portfolio: Participants design and teach a lesson</b> that uses both oral language and written experiences to enhance comprehension using best instructional practices: conversation starters, text-dependent questions, multisensory activities with language and text, supports for ELLs.</p> <p><b>- Reflect on effectiveness</b> of lesson: what worked well/didn't, changes needed and why.</p>
<p><b>1.A.2*</b></p>	<p><b>1.A.2: Curriculum Study Assignment.</b></p> <p><b>View PowerPoint</b></p> <p><b>Read: Chpts 1 &amp; 2: Bringing Words to Life</b> Identify key ideas of each chapter.</p> <p>*Identify Tier 2 and 3 words of text The Alaska Adventure. Share w/table group.</p> <p><b>1.A.2: Formative Assessment:</b></p> <p><b>*Compare/contrast</b> the differences between social and academic language vs spoken and written.</p> <p><b>*Complete the YOUR TURN</b> at the end of chapter 2, Pg. 30</p> <p>1) Select text that you will teach.</p> <p>2) Select words likely to be unknown to</p>	<p>Understand the importance of learning syntax, semantics, pragmatics, vocabulary, and text structures required for comprehension of formal written language of school, often called "academic language."</p>	<p><b>1.A.2: Curriculum Study Assignment.</b></p> <p><b>View PowerPoint</b></p> <p><b>Read: Chpts 1 &amp; 2: Bringing Words to Life</b> Identify key ideas of each chapter.</p> <p>*Identify Tier 2 and 3 words of text The Alaska Adventure. Share w/table group.</p> <p><b>1.A.2: Formative Assessment:</b></p> <p><b>*Compare/contrast</b> the differences between social and academic language vs spoken and written.</p> <p><b>*Complete the YOUR TURN</b> at the end of chapter 2, Pg. 30</p> <p>1) Select text that you will teach.</p> <p>2) Select words likely to be unknown to</p>	

	<p>1.A.3</p>	<p><b>Understand</b> the impact of text upon reading comprehension (e.g., genre, readability, coherence, text structure, and text complexity).</p>	<p>students.  3) Analyze the list for Tier 2 words &amp; most important for comprehension.  4) Decide which words you will teach.  5) Create lesson and teach.  6) Reflect upon effectiveness of the lesson.</p> <p><b>1.A.3: Curriculum Study Assignment:</b>  *<b>View PowerPoint</b>  <b>Read:</b> <i>Letting the Text Take Center Stage.</i></p> <p><b>1.A.3: Formative Assessment:</b>  <b>Summarize, chart and report</b> assigned sections focusing on effective vs ineffective practices, impact of text upon reading comprehension, challenges text structure/features present and text complexity.</p>	
	<p>1.A.4</p>	<p><b>Understand</b> how the interaction of reader characteristics, motivation, purpose of reading, and text elements impacts comprehension and student engagement.</p>	<p><b>1.A.4: Curriculum Study Assignment:</b>  *<b>View PowerPoint</b>  <b>Complete</b> Survey of Knowledge: The Reader, Text &amp; Activity. Review results  <b>Reference:</b> Introduction to Comprehension</p> <p><b>1.A.4: Formative Assessment:</b>  <b>Discuss</b> why the reader's characteristics, motivation, reading purposes and text elements are important. <b>Answer:</b> Why must they all be taken into consideration during instruction? <b>Why</b> is it important for students to <b>know</b> that all texts are not read in the same manner?</p>	



<p><b>Article: Strategies to Help Students Go Deep When Reading Digitally</b> by Katrina Schwartz</p> <p><b>Teaching Reading in Social Studies, Science &amp; Math</b> – Laura Robb; Chpt 1</p> <p><b>Teaching Reading Sourcebook: Introduction to Comprehension VI</b> - Pgs. 609 – 617</p> <p><b>WIDA Article: SLIFE: Students with Limited or Interrupted Formal Education</b></p> <p><b>WIDA HOs: CAN DO Descriptors; GO TO Strategies; Features of Academic Language; Examples of Sensory, Graphic and Interactive Supports and Strategies by Domain</b></p> <p><b>Assessing Reading: Multiple Measures, 2nd Edition</b> by Linda Diamond and B.J. Thorsnes</p>	<p>1.A.5</p> <p>1.A.6</p> <p>2.A.5</p> <p>2.A.6</p>	<p><b>Identify</b> cognitive targets (e.g., locate/recall; integrate/interpret; critique/evaluate) and the role of cognitive development in the construction of meaning of literary and informational texts.</p> <p><b>Understand</b> reading as a process of constructing meaning from a wide variety of print and digital texts and for a variety of purposes.</p> <p><b>Select</b> narrative or informational print or digital texts that are appropriate to the comprehension instruction to be provided.</p> <p><b>Provide</b> comprehension instruction that supports students' ability to read multiple print and digital texts and to synthesize information within, across and beyond those texts. ★</p>	<p><b>1.A.5: Curriculum Study Assignment.</b>  <b>-View PowerPoint</b>  <b>Read HO: Cognitive Task Levels: Webb's Depth of Knowledge</b>  <b>1.A.6: Curriculum Study Assignment.</b>  <b>Read: Tovani, Chpt 2: I Read It, But I Don't Get It and HOs: What is Literary Text: What is Informational Text?</b>  <b>1.A.5 &amp; 1.A.6: Formative Assessment:</b>  <b>Complete</b> Analyzing Features of Text Complexity worksheet with provided text.  <b>Create</b> 2-3 learning tasks for each cognitive target for a literary and informational text w/table group.  <b>2.A.5: Curriculum Study Assignment.</b>  <b>Read Article: Strategies to Help Students Go Deep When Reading Digitally</b>  <b>2.A.5 &amp; 2.A.6: Formative Assessment:</b>  <b>Use</b> the text complexity rubric to <b>analyze</b> selected literary, informational and digital text appropriate for your students to <b>identify</b> complexity levels.</p>	<p><b>1.A.7: Curriculum Study Assignment.</b>  <b>-View PowerPoint</b>  <b>-Read</b> assigned section of <i>Teaching Reading in Social Studies, Science and Math: Chpt 1</i>  <b>1.A.7: Formative Assessment: Identify</b> and <b>discuss</b> content reading issues: assumptions, roadblocks, challenges and characteristics of transmission and constructivist models with table groups.  <b>2.A.3: Formative Assessment:</b>  <b>Teams/individuals</b> present or create poster/handout with key findings and strategies identified to assist students with overcoming challenges and the obstacles of domain specific text based on participants' identified students' strengths/needs, including ELL students.</p>
			<p><b>Portfolio:</b>  *Participants apply 2-3 strategies identified with students, including ELLs, to assist with overcoming challenges and obstacles of a domain specific text based on students' strengths/need.</p> <p>Provide reflection of the effectiveness of strategies chosen.</p>	

<p>1.A.8</p>	<p><b>Understand</b> that effective comprehension processes rely on well-developed language, strong inference making, background knowledge, comprehension monitoring and self-correcting.</p>	<p><b>1.A.8: Curriculum Study Assignment: View PowerPoint</b>  <b>Reference:</b> <i>Teaching Reading Sourcebook: Introduction to Comprehension VI</i> - Pgs. 609 – 617  <b>1.A.8: Formative Assessment: Complete Study Guide for Introduction to Comprehension VI</b>  <b>Identify</b> what good readers do before, during and after reading. <b>Identify</b> different types of <b>supports</b> for ELLs.  <b>Answer:</b> How do these supports help <i>all</i> students?  <b>2.A.1 &amp; 2.A.8: Formative Assessment: Participants create</b> two fix-it up lesson plans for selected text that includes multiple student strategies for monitoring comprehension and self-correcting that <b>targets</b> all students, especially struggling readers and ELLs. (<b>See SB: Click or Clunk, Pg. 616</b> and <b>WIDA HOs: Differentiate with Supports and Maintaining Higher Order Thinking Opportunities</b> lesson planning worksheets.)</p>	<p><b>1.A.8: Curriculum Study Assignment: View PowerPoint</b>  <b>Reference:</b> <i>Teaching Reading Sourcebook: Introduction to Comprehension VI</i> - Pgs. 609 – 617  <b>1.A.8: Formative Assessment: Complete Study Guide for Introduction to Comprehension VI</b>  <b>Identify</b> what good readers do before, during and after reading. <b>Identify</b> different types of <b>supports</b> for ELLs.  <b>Answer:</b> How do these supports help <i>all</i> students?  <b>2.A.1 &amp; 2.A.8: Formative Assessment: Participants create</b> two fix-it up lesson plans for selected text that includes multiple student strategies for monitoring comprehension and self-correcting that <b>targets</b> all students, especially struggling readers and ELLs. (<b>See SB: Click or Clunk, Pg. 616</b> and <b>WIDA HOs: Differentiate with Supports and Maintaining Higher Order Thinking Opportunities</b> lesson planning worksheets.)</p>	<p><b>Portfolio: Choose</b> two idioms and <b>develop</b> lesson for students to act out and/or create a visual representation for the literal meaning, using props and</p>
<p>2.A.1</p>	<p><b>Apply</b> intentional, explicit, and systematic instructional practices for scaffolding development of higher order thinking, comprehension skills, comprehension monitoring and self-correcting (e.g., reciprocal teaching, "think aloud," etc.).</p>	<p><b>2.A.1 &amp; 2.A.8: Formative Assessment: Participants create</b> two fix-it up lesson plans for selected text that includes multiple student strategies for monitoring comprehension and self-correcting that <b>targets</b> all students, especially struggling readers and ELLs. (<b>See SB: Click or Clunk, Pg. 616</b> and <b>WIDA HOs: Differentiate with Supports and Maintaining Higher Order Thinking Opportunities</b> lesson planning worksheets.)</p>	<p><b>1.A.9: Curriculum Study Assignment: *Complete:</b> ELL Survey of Knowledge &amp; Discuss  <b>*Read assigned sections of WIDA</b></p>	<p><b>Portfolio: Choose</b> two idioms and <b>develop</b> lesson for students to act out and/or create a visual representation for the literal meaning, using props and</p>
<p>2.A.8</p>	<p><b>Model</b> a variety of strategic activities students can use to foster comprehension monitoring and self-correcting.</p>	<p><b>2.A.1 &amp; 2.A.8: Formative Assessment: Participants create</b> two fix-it up lesson plans for selected text that includes multiple student strategies for monitoring comprehension and self-correcting that <b>targets</b> all students, especially struggling readers and ELLs. (<b>See SB: Click or Clunk, Pg. 616</b> and <b>WIDA HOs: Differentiate with Supports and Maintaining Higher Order Thinking Opportunities</b> lesson planning worksheets.)</p>	<p><b>1.A.9: Curriculum Study Assignment: *Complete:</b> ELL Survey of Knowledge &amp; Discuss  <b>*Read assigned sections of WIDA</b></p>	<p><b>Portfolio: Choose</b> two idioms and <b>develop</b> lesson for students to act out and/or create a visual representation for the literal meaning, using props and</p>
<p>1.A.9</p>	<p><b>Understand</b> how English language learners' linguistic and cultural background will influence their comprehension.</p>	<p><b>1.A.9: Curriculum Study Assignment: *Complete:</b> ELL Survey of Knowledge &amp; Discuss  <b>*Read assigned sections of WIDA</b></p>	<p><b>1.A.9: Curriculum Study Assignment: *Complete:</b> ELL Survey of Knowledge &amp; Discuss  <b>*Read assigned sections of WIDA</b></p>	<p><b>Portfolio: Choose</b> two idioms and <b>develop</b> lesson for students to act out and/or create a visual representation for the literal meaning, using props and</p>

		<p><b>Scaffold</b> discussions to facilitate the comprehension of text and higher order thinking skills for students with varying English proficiency levels.</p>	<p>gestures. <b>Teach</b> lesson. <b>Reflect</b> upon the lesson, <b>identify</b> problems or barriers ELLs faced, <b>include</b> supports provided to overcome.</p>
<p>2.A.7</p>	<p><b>Article:</b> SLIFE: Students with Limited or Interrupted Formal Education  <b>Reference as Needed:</b> WIDA HOs: CAN DO Descriptors; GO TO Strategies; Features of Academic Language; Examples of Sensory, Graphic and Interactive Supports and Strategies by Dornain</p>	<p><b>1.A.9: Formative Assessment:</b> Discuss key findings. Report out assigned sections to group and implications for ELL students.  <b>2.A.7: Formative Assessment:</b> Discuss how idioms pose problems/barriers for ELLs. <b>Choose</b> two idioms and <b>develop</b> lesson for students to act out and/or create a visual representation for the literal meaning, using props and gestures. <b>Teach</b> lesson. <b>Reflect</b> upon the lesson, <b>identify</b> problems or barriers ELLs faced, <b>include</b> supports provided to overcome.</p>	
<p>1.A.10</p>	<p><b>1.A.10: Curriculum Study Assignment.</b>  <b>*View PowerPoint</b>  <b>*Complete</b> Formative Assessment Quiz  <b>1.A.10: Formative Assessment:</b>  <b>Discuss</b> differences between formative</p>	<p><b>Understand</b> the role of formal and informal assessment of comprehension in making instructional decisions to meet individual student needs.</p>	<p><b>* Facilitator Observations</b>  <b>* Peer Discussions</b>  <b>* Ongoing Case Study</b>  <b>* Portfolio:</b>  <b>1) Summaries of key points of all</b></p>

		<p>2.A.9</p>	<p><b>Recognize, describe, and incorporate</b> appropriate comprehension assessments to <u>guide instruction</u>.</p>	<p>and summative assessments, include different types of each.</p> <p><b>2.A.9: Formative Assessment:</b></p> <p><b>*Use data from a variety of formative assessments:</b> <i>iReady</i>, running records, MAZE Screening Comprehension to plan targeted comprehension instruction. (See <b>Multiple Measures</b> for a variety.)</p> <p><b>*Examine</b> class composite FSA data. <b>Identify</b> strengths and needs, <b>include</b> targeted comprehension instruction for class, groups and individual students.</p>	<p>readings.</p> <p><b>2) Participants</b> complete an ongoing <b>Case Study</b> that incorporates all ten indicators, 1.A.1 - 10: Provide 3-5 examples that demonstrate an <b>understanding</b> of strategies that builds, enhances and strengthens comprehension.</p> <p><b>- Reflect on effectiveness</b> of lessons taught thus far for indicators 1.A.1 - 1.A.10 identify what worked well/didn't, changes needed and why.</p> <p><b>3) Reflect</b> upon current practice and how to provide more authentic opportunities for language experience and text discussion in daily instruction.</p> <p><b>4) Reflect: Which formative assessments</b> do you <b>use</b> or plan to? <b>What</b> have you <b>learned</b> about informative and summative assessments?</p>
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**FOUNDATIONAL READING SKILL: ORAL LANGUAGE**

Course Number and Name of Course	Required Course Reading	Indicator Code	Specific Indicator	Curriculum Study Assignment at Indicator Level with Built-In Formative Assessment	Summative Assessment
	<p><b>Teaching Reading Sourcebook, 3<sup>rd</sup> Edition, Chpt. 2: Structure of English</b></p> <p><b>Article: Role of Early Language in Literacy Development:</b> Shanahan &amp; Lonigan</p> <p><b>Teaching Reading Sourcebook, 3<sup>rd</sup> Edition, Chpt 1: What is Academic Language?</b></p> <p><b>Article: Academic Language in Diverse Classrooms – Gottlieb &amp; Ernst-Slavit</b></p> <p><b>WIDA HOs: CAN DO Descriptors; GO TO Strategies; Features of Academic Language; Examples of Sensory, Graphic and Interactive Supports and Strategies by Domain</b></p> <p><b>Teaching Reading Sourcebook, Chpt 2 – Structures of Spanish</b></p>	1.B.1	<p><b>Understand</b> how the students' development of phonology, syntax, semantics, and pragmatics relates to comprehending written language.</p>	<p><b>1.B.1: Curriculum Study Assignment:</b>  <b>View PowerPoint</b>                      *Complete Phonological Awareness (PA) Survey of Knowledge                      *Read: <b>Teaching Reading Sourcebook, 3<sup>rd</sup> Edition</b>, Chpt. 2: <i>Structures of English</i>                      *Watch Video: <i>Sounds of English</i>  <b>1.B.1: Formative Assessment:</b>                      *Review types of PA from the continuum                      *Complete: <i>Teaching Reading Sourcebook</i> Study Guide: Chpt. 2: Structures of English                      *Identify the type of phonological awareness skill presented on the PA activity cards. <b>Identify</b> which PA activities include multisensory tasks,                      *Identify the specific senses targeted.                      *Practice producing individual sounds of English with a partner.</p>	* Facilitator Observations * Peer Discussions * Ongoing Case Study * Portfolio
		1.B.4	<p><b>Understand</b> that the variation in students' oral language exposure and development requires differentiated instruction.</p> <p><b>Apply</b> intentional, explicit, and systematic instructional practices for scaffolding development of oral/aural language skills (e.g., language experience approach, Socratic questioning). ★</p>	<p><b>1.B.4: Curriculum Study Assignment:</b>  <b>View PowerPoint</b>                      *Complete the WIDA ELL Survey                      *Read: <i>Role of Early Language in Literacy Development</i>  <b>1.B.4: Formative Assessment:</b>                      *Discuss survey and article findings.                      *Reflection Journal: Answer: What is the role of oral language in today's classrooms? *How do we support students with poor language skills, including ELLs? How do we increase their oral language? *Discuss reflections with partner/table group.  <b>2.B.1: Formative Assessment:</b>                      *Practice methods to build oral/aural language skills through Socratic questioning and reciprocal teaching.</p>	
		2.B.1			

	<p><b>Study.com Video:</b> COGNITIVE Academic Language Proficiency (CALP)</p> <p><b>Articles:</b> <i>Literacy Instruction for ELLs and ELL Strategies &amp; Best Practices</i> from Colorin Colorado</p> <p><b>Article:</b> <i>Reading Rockets: Types of Informal Classroom-Based Assessments: The Role of Oral Language in Literacy Development</i></p>	<p>1.B.2</p> <p>2.B.2</p>	<p><b>Understand</b> the differences between social and academic language.</p> <p><b>Create</b> an environment where students practice appropriate social and academic language to discuss diverse texts.</p>	<p><b>1.B.2: Curriculum Study Assignment:</b> <b>*View PowerPoint</b> <b>*Read: <i>Teaching Reading Sourcebook, 3rd Edition</i>, Chpt 1: <i>What is Academic Language?</i></b> <b>1.B.2: Formative Assessment:</b> <b>*Complete: <i>Teaching Reading Sourcebook</i> Study Guide: Chpt. 1: What is Academic Language?</b> <b>*Identify the following:</b> -Differences between social &amp; academic language -Roles of academic lang. -Dimensions of Academic language -Different language perspectives -What speakers and writers do <b>2.B.2: Formative Assessment:</b> <b>*List activities from your classroom that highlight the use of social and academic language.</b> <b>*Review WIDA HOs for supports and strategies by domains and sensory activities. Answer:</b> Which activities will you implement?</p>	
	<p>1.B.3</p> <p>2.B.4</p>	<p><b>Understand</b> that writing enhances the development of oral language.</p> <p><b>Use</b> writing experiences to enhance oral language (e.g., interactive writing, student to teacher sentence dictation).</p>	<p><b>1.B.3: Curriculum Study Assignment:</b> <b>Read Article: <i>Academic Language in Diverse Classrooms</i></b> <b>*Review stages of oral vs written language stages</b> <b>*Review the Matthew Effect</b> <b>*View PowerPoint</b> <b>1.B.3: Formative Assessment:</b> <b>*Discuss</b> how each stage of oral language vs written differs and compliments each other. <b>*Describe the Matthew Effect.</b> <b>2.B.4: Formative Assessment:</b> Use the I Do, We Do, You Do lesson model and develop a lesson that supports and develops the oral language needs of students through an interactive shared writing experience.</p>		

<p>1.B.5</p>	<p>Recognize the importance of English language learners' home languages, and their significance for learning to read English.</p>	<p><b>1.B.5: Curriculum Study Assignment.</b>  <b>Review/Reference: Teaching Reading Sourcebook, Chpt 2 – Structures of Spanish</b></p> <p><b>1.B.5: Formative Assessment:</b>  <b>*Complete Study Guide</b> for Chpt 2: Structures of Spanish</p> <p><b>*Identify</b> key points of Spanish letter/sound system, sound/spelling sequence, syllable types and patterns, English/Spanish language differences, cross language transfer and positive/false cognates.</p> <p><b>2.B.3: Curriculum Study Assignment.</b>  <b>*Watch video: COGNITIVE Academic Language Proficiency (CALP)</b></p> <p><b>*Read Articles: Literacy Instruction for ELLs and ELL Strategies &amp; Best Practices</b> from Colorin Colorado</p> <p><b>2.B.3: Formative Assessment:</b>  <b>*Complete:</b> Study.com CALP Video Quiz</p> <p><b>*Use</b> articles, WIDA HOs and the Speaking and Listening Standards and identify 2-5 effective methods of supporting an ELL's home language as a strength to support acquisition of English.</p>	<p><b>Summative Assessment:</b>  <b>*Case Study:</b>  Administer two oral language assessments to two students, one being an ELL acquiring English and 1 student participant's <b>Case Study</b>. Determine appropriate next steps for instruction.</p> <p><b>*Facilitator Observation</b></p> <p><b>*Class Discussion</b></p> <p><b>*Portfolio:</b>  Participants will complete a portfolio that includes all completed readings, assignments, research, student artifacts, assessments &amp; reflections.</p>
<p>2.B.3*</p>	<p>Recognize and apply an English language learner's home language proficiency as a foundation and strength to support the development of oral language in English. ★</p>	<p><b>1.B.5: Curriculum Study Assignment.</b>  <b>Review/Reference: Teaching Reading Sourcebook, Chpt 2 – Structures of Spanish</b></p> <p><b>1.B.5: Formative Assessment:</b>  <b>*Complete Study Guide</b> for Chpt 2: Structures of Spanish</p> <p><b>*Identify</b> key points of Spanish letter/sound system, sound/spelling sequence, syllable types and patterns, English/Spanish language differences, cross language transfer and positive/false cognates.</p> <p><b>2.B.3: Curriculum Study Assignment.</b>  <b>*Watch video: COGNITIVE Academic Language Proficiency (CALP)</b></p> <p><b>*Read Articles: Literacy Instruction for ELLs and ELL Strategies &amp; Best Practices</b> from Colorin Colorado</p> <p><b>2.B.3: Formative Assessment:</b>  <b>*Complete:</b> Study.com CALP Video Quiz</p> <p><b>*Use</b> articles, WIDA HOs and the Speaking and Listening Standards and identify 2-5 effective methods of supporting an ELL's home language as a strength to support acquisition of English.</p>	<p><b>Summative Assessment:</b>  <b>*Case Study:</b>  Administer two oral language assessments to two students, one being an ELL acquiring English and 1 student participant's <b>Case Study</b>. Determine appropriate next steps for instruction.</p> <p><b>*Facilitator Observation</b></p> <p><b>*Class Discussion</b></p> <p><b>*Portfolio:</b>  Participants will complete a portfolio that includes all completed readings, assignments, research, student artifacts, assessments &amp; reflections.</p>
<p>1.B.6</p>	<p>Understand the role of formal and informal oral language assessment to make instructional decisions to meet individual student needs.</p>	<p><b>1.B.6: Curriculum Study Assignment.</b>  <b>*View PowerPoint</b></p> <p><b>Read Article: Reading Rockets: Types of Informal Classroom-Based Assessments: The Role of Oral Language in Literacy Development</b></p> <p><b>1.B.6: Formative Assessment:</b>  <b>*Identify and Discuss:</b> The types of informal assessments presented in article.</p> <p><b>2.B.5: Formative Assessment:</b>  <b>*Analyze</b> samples of oral language formal and informal assessments provided. <b>Identify</b> each. <b>Answer:</b> What does each assessment measure?</p>	<p><b>Summative Assessment:</b>  <b>*Case Study:</b>  Administer two oral language assessments to two students, one being an ELL acquiring English and 1 student participant's <b>Case Study</b>. Determine appropriate next steps for instruction.</p> <p><b>*Facilitator Observation</b></p> <p><b>*Class Discussion</b></p> <p><b>*Portfolio:</b>  Participants will complete a portfolio that includes all completed readings, assignments, research, student artifacts, assessments &amp; reflections.</p>
<p>2.B.5</p>	<p>Recognize, describe, and incorporate appropriate oral language assessments to guide instruction. ★</p>	<p><b>1.B.6: Curriculum Study Assignment.</b>  <b>*View PowerPoint</b></p> <p><b>Read Article: Reading Rockets: Types of Informal Classroom-Based Assessments: The Role of Oral Language in Literacy Development</b></p> <p><b>1.B.6: Formative Assessment:</b>  <b>*Identify and Discuss:</b> The types of informal assessments presented in article.</p> <p><b>2.B.5: Formative Assessment:</b>  <b>*Analyze</b> samples of oral language formal and informal assessments provided. <b>Identify</b> each. <b>Answer:</b> What does each assessment measure?</p>	<p><b>Summative Assessment:</b>  <b>*Case Study:</b>  Administer two oral language assessments to two students, one being an ELL acquiring English and 1 student participant's <b>Case Study</b>. Determine appropriate next steps for instruction.</p> <p><b>*Facilitator Observation</b></p> <p><b>*Class Discussion</b></p> <p><b>*Portfolio:</b>  Participants will complete a portfolio that includes all completed readings, assignments, research, student artifacts, assessments &amp; reflections.</p>

FOUNDATIONAL READING SKILL: PHONOLOGICAL AWARENESS				
Course Number and Name of Course	Required Course Reading	Indicator Code	Specific Indicator	Curriculum Study Assignment at Indicator Level with Built-in Formative Assessment
	<b>Teaching Rdg. Sourcebook;</b> Section II: Early Literacy. Chpt 3: Print Awareness. Chpt. 4: Letter Knowledge. Chpt. 5: Phonological Awareness <b>Article: Phonemic Awareness-</b> Honig, Diamond& Gutlohn	1.C.1	<b>Understand</b> phonology as it relates to language development and reading achievement (e.g., phonological processing, phonemic awareness skills, phonemic analysis and synthesis). <b>Recognize</b> the phonological continuum beginning with sensitivity to large and concrete units of sound (i.e., words & syllables) and progressing to small and abstract units of sound (onset-rimes and phonemes).	<b>1.C.1 &amp; 2: Curriculum Study Assignment.</b> <b>*View PowerPoint</b> <b>*Complete</b> Phonological Awareness (PA) Terms Survey of Knowledge <b>*Review</b> each type of phonological awareness skill. <b>*Read:</b> <i>Phonological Awareness Continuum</i> ; Professional paper <i>Phonemic Awareness</i> ; Chpt. 5: <i>Phonological Awareness &amp; Just the Facts: Dyslexia Assessment: What is it and how can it help?</i> <b>*View Video:</b> Phonological Awareness <b>*Read, Study and Practice:</b> <i>Multiple Measures: CORE Phonological Segmentation Test</i>
	<b>Assessing Reading: Multiple Measures, 2nd Edition</b> by Linda Diamond and B.J. Thorsnes <b>Article:</b> <i>Just the Facts: Dyslexia Assessment: What is it and how can it help?</i> by International Dyslexia Assoc. <b>Video:</b> <i>Phonological Awareness</i>	2.C.1	<b>Apply</b> intentional, explicit, systematic instructional practices to scaffold development of phonological awareness. (e.g., blending and segmenting syllables, onset-rimes, and phonemes). <b>Provide</b> opportunities for students to use oral/aural language to enhance phonological awareness (e.g., rhyming and alliteration). ★	<b>1.C.1 &amp; 2: Formative Assessment:</b> <b>*Review</b> survey of knowledge results. <b>*Complete Study Guide</b> for Chpt. 5: <i>Phonological Awareness</i> <b>*Use</b> phonological awareness activity cards to identify the type of skill from PA Continuum. <b>*Identify</b> the <b>multisensory</b> tasks for each activity, including senses used. <b>Reflection:</b> How would the activities be adapted to <b>support ELLS?</b> <b>*Groups/individuals discuss and report</b> what they learned about phonological awareness in the primary classroom. <b>*Groups/individuals</b> create a 20 word, or less, summary defining dyslexia. <b>Reflection</b> <b>*Answer following questions:</b> What is Dyslexia? How is it identified? What to expect? When is the best time to assess? <b>*Use</b> the early writing continuum to <b>identify</b> the correct state of writing the
	<b>Article:</b> <i>Phonological Awareness and Writing</i> <b>Teaching Reading Sourcebook: Section I: Word Structure.</b>	2.C.2		<b>2.C.1 &amp; 2: Summative Assessment:</b> <b>*Administer</b> the Phonological Segmentation Test to 3 students (1 student participant's Case Study). <b>Analyze</b> results and <b>plan</b> instruction. <b>*Add to Case Study.</b>



	<p>- Chpt. 3: Print Awareness. Chpt. 4: Letter Knowledge</p> <p><b>HO:</b> Phonological and Phonemic Awareness cards.</p> <p><b>Article: Elements of Effective Instruction: Phonological Awareness</b></p>	<p>1.C.3</p> <p>2.C.4</p>	<p>Understand that writing, in conjunction with phonological awareness, enhances reading development.</p> <p>Use writing experiences, in conjunction with phonological instruction, to enhance reading achievement (e.g., Elkonin boxes or magnetic letters, individual response whiteboards).</p>	<p>students are performing in, including matching to phonological awareness placement.</p> <p>*Practice administering Phonological Segmentation Test with partner.</p> <p><b>1.C.3 &amp; 4: Curriculum Study Assignment.</b></p> <p>*View <b>PowerPoint</b></p> <p>*Read: <i>Phonological Awareness and Writing</i></p> <p>*Video: Sound production, pronunciation and sounds of English, Word Structure, and Letter knowledge.</p> <p><b>Teaching Reading Sourcebook:</b></p> <p><b>Section 1: Word Structure:</b> Chpts 3 &amp; 4: <i>Print Awareness &amp; Letter Knowledge</i></p> <p><b>1.C.3 &amp; 4: Formative Assessment:</b></p> <p>*Complete: <b>Study Guides for Section 1:</b> <i>Word Structure: Chpts 3 &amp; 4: Print Awareness &amp; Letter Knowledge</i></p> <p>*Teachers <b>practice</b> in teams of 3 producing the sounds of English, with focus on stop sounds and articulating sounds without distortion.</p> <p>*Identify visually similar, phonologically similar and phonologically and visually similar letters. <b>*Reflection Journal:</b></p> <p><b>Answer following questions: Why</b> should teachers be aware of this? <b>How</b> is it problematic for students and ELLs learning to read? <b>How</b> do we prevent it from impeding learning to read? <b>Write</b> the name of each letter of the alphabet. <b>What</b> do you notice?</p> <p><b>2.C.3 &amp; 4: Formative Assessment:</b></p> <p>*Practice administering Phoneme Deletion &amp; Segmentation Tests with partner.</p>	<p><b>2.C.4 &amp; 3: Summative Assessment:</b></p> <p>*Choose 2 areas from the phonological awareness continuum to design two lessons for each: 1) oral Say-It-and-Move-It Elkonin Sound Boxes; 2) add print. Include <b>multisensory</b> tasks with each: <b>identify</b> senses used. <b>*Teach lessons.</b></p> <p>*Reflect upon effectiveness of lessons. <b>What worked well/didn't? Changes?</b></p>
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<p>1.C.4</p> <p><b>Distinguish</b> both phonological and phonemic differences in language and their applications in written and oral discourse patterns (e.g., language &amp; dialect differences).</p>	<p>1.C.5</p> <p><b>Understand</b> how similarities and differences in sound production between English and other languages affect English language learners' reading development in English.</p>	<p><b>1.C.5: Curriculum Study Assignment.</b>  <b>*Review:</b> Structure of Spanish: Positive and false cognates.  <b>*Review:</b> Positive, negative and zero phonics elements transfer to English.  <b>1.C.5: Formative Assessment:</b>  <b>*Identify</b> sounds of English that ELLS would find difficult. <b>Answer: Why these sounds present problems for ELLs?</b></p>	<p><b>2.C.5: Summative Assessment:</b>  <b>*Administer</b> Phoneme Deletion &amp; Segmentation Tests with two students. Analyze results and identify needed instruction for each student. (1 student participant's <b>Case Study</b>.)</p>
<p>1.C.5</p>	<p><b>2.C.3</b></p> <p><b>Understand</b> and <b>apply</b> knowledge of how variations in phonology across languages affect English language learners' reading and writing development. ★</p>	<p><b>2.C.3 Formative Assessment:</b>  <b>*Participants record</b> themselves and <b>analyze</b> their sound production with cell phones. <b>Analyze</b> their production of sounds for accents/dialects. <b>Share.</b>  <b>*Participants listen</b> to sample recordings of three ELL students with partner/table group. Identify the sound difficulties/errors. <b>List</b> methods to support ELLs.</p>	<p><b>1.C.6: Curriculum Study Assignment.</b>  <b>*View PowerPoint</b>  <b>*Review Exs:</b> PA Activity cards  <b>*Read/Review HOs: Elements of Effective Instruction: Phonological Awareness</b>  <b>1.C.6: Formative Assessment:</b>  <b>*Read, Study and Practice: CORE</b> Phoneme and Segmentation Tests with partners.</p>
<p>1.C.6</p>	<p><b>2.C.5</b></p> <p><b>Understand</b> the role of formal and informal phonological awareness assessment to make instructional decisions to meet individual student needs.  <b>Recognize, describe, and incorporate</b> appropriate phonological awareness assessments to <u>guide instruction.</u> ★</p>		

FOUNDATIONAL READING SKILL: PHONICS				
Course Number and Name of Course	Required Course Reading	Indicator Code	Specific Indicator	Curriculum Study Assignment at Indicator Level with Built-in Formative Assessment
	<p><b>Teaching Reading. SB- Section III: Decoding word recognition</b></p> <p><b>Teaching Reading SB: Ch. 6: Phonics Ch. 7: Irregular Word Reading Ch.8: Multisyllabic Word Reading</b></p> <p><b>HO: Spot &amp; Dot by Dr. Wendy Cheyenne</b></p> <p><b>Assessing Reading: Multiple Measures, 2<sup>nd</sup> Edition</b> by Linda Diamond and B.J. Thorsnes</p>	<p>1.D.1</p> <p>2.D.1</p>	<p><b>Understand</b> that phonological units (words, syllables, onset-rimes, and phonemes) map onto orthographic units (words, rimes, letters) in alphabetic languages.</p> <p><b>Apply</b> intentional, explicit, systematic instructional practices for scaffolding phonics development on a continuum from the individual phoneme-grapheme level through the multi-syllabic word level. ★</p>	<p><b>1.D.1: Curriculum Study Assignment.</b>  <b>*Complete:</b> Phonics Survey of Knowledge <b>*Review</b> and correct Phonics Survey of Knowledge incorrect responses.  <b>*View PowerPoint</b>  <b>*Read:</b> <i>Teaching Reading. SB- Section III: Decoding word recognition. AND Ch. 6: Phonics</i>  <b>1.D.1: Formative Assessment:</b>  <b>*Complete</b> Study Guide for <i>Section III: Decoding word recognition. and Ch. 6: Phonics</i>  <b>*Analyze:</b> The Adams Model of Skilled Reading and Ehri's Phases of word recognition development in Section III.  <b>*Groups/individuals create</b> presentation for key information found in Section III.  <b>*Groups/individuals analyze</b> samples of student work to determine which phase (from Ehri's) each student places.  <b>*Reflect</b> upon how this knowledge guides instruction. <b>Share.</b></p> <p><b>2.D.1: Curriculum Study Assignment. Study and Practice:</b> CORE Phonics Surveys/Assessment  <b>*Practice</b> administering CORE Phonics Surveys to students.</p> <p><b>2.D.2: Curriculum Study Assignment.</b>  <b>*View PowerPoint</b>  <b>*Analyze:</b> Phonics Elements (sound/spelling categories).  <b>*Compare</b> with the sounds of Spanish.  <b>*Review:</b> 20 Most Common Greek and Latin Roots and affixes used in English texts.</p>
				<p>Summative Assessment</p> <p><b>* Facilitator Observations</b>  <b>* Peer Discussions</b>  <b>* Ongoing Case Study</b>  <b>* Portfolio</b></p> <p><b>2.D.1: Summative Assessment:</b>  <b>-Complete the Phonics Assessment with Case Study student. Analyze results and identify instruction needed.</b>  <b>-*Administer</b> to 2 students one below and one grade level the Phonics Surveys (Case Study student should be one). <b>Analyze</b> student samples for phonics errors. <b>Plan</b> instruction.</p>

			<p>*Compare with the Spanish language.  <b>2.D.2: Formative Assessment:</b>  *Define phoneme, grapheme and morpheme. <b>Include</b> multiple examples of each. *Identify which sounds are same/different for production and spellings * <b>Identify</b> which Greek &amp; Latin roots and affixes are common between English &amp; Spanish.</p>	
	<p>1.D.2</p>	<p><b>Understand</b> sound-spelling patterns and phonics (grapheme-phoneme correspondence rules).</p>	<p><b>1.D.2: Curriculum Study Assignment.</b>  *<b>Read HC:</b> Phonics Stages of Spelling  *<b>Review:</b> Scope &amp; sequence of phonics instruction  *<b>Review</b> the 9 instructional guidelines.  <b>1.D.2: Formative Assessment:</b>  *<b>Analyze</b> student spellings provided and <b>identify</b> spelling stages.  *<b>Discuss: Why</b> is it important to determine students' spelling stages?  *<b>Identify</b> differences between consonants and vowels, blends, digraphs, diphthongs, schwa, silent consonants/vowels, r-controlled vowels and vowels with silent e. *<b>Place</b> each on sequence for teaching phonic elements.  *<b>Present</b> the 9 instructional guidelines with examples in the form of a handout or chart.</p>	
	<p>1.D.3</p>	<p><b>Understand</b> structural analysis of words.</p>	<p><b>1.D.3: Curriculum Study Assignment.</b>  *<b>Read:</b> Chpt 8 – <i>Multisyllabic Word Reading</i>  *<b>Study</b> the 4 common blending routines  *<b>Observe</b> model lessons and/or video of the 4 common blending routines.  *<b>Observe</b> model lesson of Spot and Dot syllabication to decode multisyllabic words.  <b>1.D.3: Formative Assessment:</b>  *<b>Complete</b> Study Guide for <i>Chpt 8: Multisyllabic Word Reading</i>  *<b>Practice</b> in teams of 3-4 each of the 4 blending routines beginning with Sound by-Sound.</p>	

		<p><b>*Practice:</b> Spot &amp; Dot with multisyllabic words (4 basic syllabication rules).  <b>*Identify</b> types of syllables (open/closed, silent e, etc.) during Spot &amp; Dot practice and characteristics of each syllable type.</p>		
1.D.4	<p><b>Understand</b> that both oral language and writing can be used to enhance phonics instruction.</p>	<p><b>1.D.4: Formative Assessment:</b>  <b>*Analyze</b> 3 sample assessments, spelling inventories and writing samples for 3 different students, that will include an ELL student, for the phonic errors. Discuss with partner/table group students' individual instructional needs.</p>		
2.D.3	<p><b>Use</b> oral/aural language and writing experiences to enhance phonics instruction (e.g., sentence strip words, phrases, and pocket charts). ★</p>	<p><b>2.D.3: Formative Assessment:</b>  <b>*Create instructional materials</b>, such as, sentence strip words, phrases, and make word lessons from analysis of the 3 sample assessments, spelling inventories and writing samples for 3 different students, that will include an ELL student, for the phonic errors and identify next steps/instruction.</p>		
1.D.5	<p><b>Understand</b> the role of formal and informal phonics assessment to make instructional decisions to meet individual student needs.</p>	<p><b>1.D.5: Curriculum Study Assignment:</b>  <b>*View PowerPoint</b>  <b>* Review and study: Types of Phonics Screeners:</b>          -Letter naming          -Individual sound          -Nonsense words  <b>*Reflect</b> on the Phonological Awareness measures administered earlier in the competencies.</p>		
2.D.4	<p><b>Recognize, describe, and incorporate</b> appropriate phonics assessments to guide instruction. ★</p>	<p><b>1.D.5: Formative Assessment:</b>  <b>*Practice</b> administering with partner.  <b>*Identify</b> what each assessment assesses, why and when to assess and next steps. <b>Describe</b> how the assessments are administered.  <b>*Reflect and answer: What types of tests are used</b> to assess phonics knowledge and <b>dyslexia</b>? <b>What areas of poor performance</b> are thought to suggest <b>dyslexia</b>?</p>		
				<p><b>2.D.4: Summative Assessment:</b>  <b>*Create</b> 2 explicit phonics lessons following the sequence of phonics instruction from the 3 samples analyzed for 1.D.4. <b>Identify</b> how each lesson <b>differentiates</b> for each student, <b>reasons</b> for instructional focus. <b>Include</b> student data to <b>support</b> differentiation and multisensory tasks to enhance learning.  <b>*Provide</b> how writing and oral language was integrated into the lessons to enhance phonics instruction. Include <b>analysis</b> of student work.</p>

FOUNDATIONAL READING SKILL: FLUENCY				
Course Number and Name of Course	Required Course Reading	Indicator Code	Specific Indicator	Curriculum Study Assignment at Indicator Level with Built-in Formative Assessment
	<p><b>Teaching Reading Sourcebook: Section IV: Reading Fluency &amp; Chpt 9: Fluency Assessment</b></p> <p><b>Article: Connecting Reading Fluency &amp; Oral Language for Student Success</b></p> <p><b>Article: Fluency: The Bridge from Decoding to Reading Comprehension</b></p> <p><b>Assessing Reading: Multiple Measures, 2nd Edition</b> by Linda Diamond and B.J. Thorsnes</p> <p><b>Teaching Reading Sourcebook: Alaska Adventure</b></p> <p><b>Teaching Sourcebook: Ch. 9: Fluency Assessment and Ch 10: Fluency Instruction</b></p>	<p>1.E.1</p> <p>2.E.1</p>	<p><b>Understand</b> that the components of reading fluency are accuracy, expression, and rate which impact reading endurance and comprehension.</p> <p><b>Apply</b> intentional, explicit, systematic instructional practices to scaffold accuracy, expression, rate, and reading endurance (e.g., paired reading, repeated reading, echo reading, reader's theater, etc.).</p>	<p><u>1.E.1: Curriculum Study Assignment.</u></p> <p><b>*View PowerPoint</b></p> <p><b>*Complete:</b> Fluency Anticipation Guide</p> <p><b>*Read: Teaching Reading Sourcebook: Section IV: Reading Fluency</b></p> <p><b>*Read Article: Connecting Reading Fluency &amp; Oral Language for Student Success</b></p> <p><b>*Review:</b> Methods for Building Fluency</p> <p><b>*Review:</b> Repeated oral reading methods</p> <p><u>1.E.1: Formative Assessment:</u></p> <p><b>Complete Study Guide for Teaching Reading Sourcebook: Section IV: Reading Fluency</b></p> <p><b>*Report Assigned Reading Section: Connecting Reading Fluency &amp; Oral Language for Student Success</b></p> <p><b>*Reflection: Which of the 3 fluency elements is the most important? Why? Discuss. *Reflect and answer:</b> How does fluency directly affect comprehension of text?</p> <p><u>2.E.1: Curriculum Study Assignment.</u></p> <p><b>Read Chpt 10: Fluency Instruction</b></p> <p><u>2.E.1: Formative Assessment:</u></p> <p><b>Complete Study Guide for Chpt 10.</b></p> <p><b>*Which methods for building fluency do you currently use from Methods to Building Fluency, such as, paired reading, Echo Reading, etc.)?</b></p> <p><b>*How will you incorporate repeated oral reading methods in your class? Identify reading methods, including why chosen.</b></p> <p><b>*Choose 2 repeated oral reading methods and texts to demonstrate each method with partners. How does</b></p>
				Summative Assessment

1.E.2	<p>repeated readings such as, Readers Theatre, Echo and phrase-cued text reading <b>affect</b> fluency?</p> <p><b>1.E.2: Curriculum Study Assignment:</b>  <b>*View PowerPoint</b>  <b>*Read:</b> <i>Fluency: The Bridge from Decoding to Reading Comp.</i>  <b>*Read:</b> Sentence Tunes  <b>1.E.1: Formative Assessment:</b>  <b>Discuss with peers:</b> The relationship between fluency and comprehension.  <b>*Practice</b> with partner/group how stressing different words in a sentence changes meaning and <b>how</b> the meaning evolves with <b>HO:</b> Sentence Tunes.  <b>Discuss</b> the meaning changes.</p>	<p>repeated readings such as, Readers Theatre, Echo and phrase-cued text reading <b>affect</b> fluency?</p> <p><b>2.E.2: Summative Assessment:</b>  <b>*Teach</b> phrase-cued coding to class/students, including <b>Case Study</b> student. Each student <b>reads</b> their coding to a partner. <b>Compare</b> each's coding. <b>Identify</b> if each coding maintained meaning or changed it.  <b>Analyze</b> class/students' phrase-cued coding to <b>identify</b> fluency instruction.  <b>*Add analysis to Reflection Journal.</b>  <b>*Add student work, results, analysis and fluency instruction to Case Study.</b></p>	
2.E.2	<p><b>Understand</b> that effective readers demonstrate flexibility by adjusting their reading rate to accommodate the kinds of texts they are reading in order to facilitate comprehension.</p> <p><b>Use</b> oral/aural language and writing experiences to enhance fluency (e.g., poetry charts, song lyrics). ☐</p>	<p><b>2.E.2: Curriculum Study Assignment:</b>  <b>*Review and Study:</b> Phrase-Cued Text Reading with <i>Alaska Adventure</i>  <b>2.E.2: Formative Assessment:</b>  <b>*Independently</b> use the phrase-cued text marking with <i>Alaska Adventure</i>.          Table group reads their phrase-cued text codings to each other. Compare with peers to identify how same/different, meaning enhancements/changes and how would support students.</p>	
1.E.3	<p><b>Understand</b> the relationships among fluency, word recognition, and comprehension.</p>	<p><b>1.E.3: Curriculum Study Assignment:</b>  <b>*Watch Video and/or Observe Model:</b> Passage reading with errors, how to score and analyze the errors.  <b>*Review:</b> Hasbrouck &amp; Tindal's <i>Oral Reading Norms</i>  <b>1.E.3: Formative Assessment:</b>  <b>*Teachers</b> record errors from video or model passage reading.  <b>*Provide brief description</b> of fluency skills, types of errors and next steps from video or model with partner/group.  <b>*Use</b> Hasbrouck &amp; Tindal oral reading norms to <b>identify</b> reading rate and percentile.</p>	
2.E.3	<p><b>Recognize, describe, and incorporate</b> appropriate fluency assessments to guide instruction. ☐</p>		

			<p><b>2.E.3: Curriculum Study Assignment.</b>  <b>*Read: Ch 9: Fluency Assessment</b>  <b>* View PowerPoint</b></p> <p><b>2.E.2: Formative Assessment:</b>  <b>*Complete Study Guide for Chpt 9.</b>  <b>*Administer an Oral Reading Fluency assessment to 3 students. Record and analyze each student's errors. Identify fluency supports and instruction needed for each child. Share findings with peers.</b></p>	
	1.E.4	<p><b>Understand</b> that both oral language and writing enhance fluency instruction.</p>	<p><b>1.E.4: Curriculum Study Assignment.</b>  <b>*Explore</b> reading practices to improve fluency, such as, repeated readings, phrase-cued, partner, radio, echo, reader's theatre reading. Provide samples of each.</p> <p><b>1.E.4: Formative Assessment:</b>  <b>Participants</b> will be provided with samples of two students fluency skills. They will review the students' work and assessments to identify characteristics that make them a fluent reader/writer or a struggling one. Areas of concern will be identified, including how this effects their word recognition and comprehension of text. Analysis will be presented to whole group to discuss.</p>	
	1.E.5	<p><b>Understand</b> the role of formal and informal fluency assessment to make instructional decisions to meet individual student needs.</p>	<p><b>1.E.5: Curriculum Study Assignment.</b>  <b>*View PowerPoint</b>  <b>*Review: Ch. 9: Fluency Assessment</b>  <b>*Review: Methods for Building Fluency; Repeated oral reading methods; &amp; Hasbrouck &amp; Tindal's Oral Reading Norms</b></p> <p><b>1.E.5: Formative Assessment:</b>  <b>*Create</b> a fluency handout to share the importance of fluency instruction, <b>providing</b> strategies to improve for peers, parents and teachers.</p>	<p><b>1.E.5: Summative Assessment:</b>  <b>*Examine</b> two students oral reading fluency date. <b>Chart</b> data (ORF) scores and <b>plot</b> aim line. <b>Note: One student should be the participant's Case Study.</b> <b>*Identify</b> weekly increase (goal) for each student. <b>Identify</b> number of weeks to reach 75%.</p>



FOUNDATIONAL READING SKILL: VOCABULARY				
Course Number and Name of Course	Required Course Reading	Indicator Code	Specific Indicator	Curriculum Study Assignment at Indicator Level with Built-in Formative Assessment
	<b>Teaching Reading Sourcebook: Section V, Vocabulary - Chpts 11-13:</b> Ch. 11 <i>Specific Word Instruction: Identifying Primary Goal of Word Instruction: Selecting Words for ELLs and Word Tiers; Suggested Teaching Methods for ELLs.</i>	1.F.1	<b>Understand</b> the goal of receptive and expressive vocabulary instruction is the application of a student's understanding of word meanings to multiple oral and written contexts. <b>Apply</b> intentional, explicit, systematic instructional practices to scaffold vocabulary and concept development (e.g., shared reading, semantic mapping, etc.) ★	<b>1.F.1 &amp; 2: Curriculum Study Assignment.</b> <b>*View PowerPoint</b> <b>*Complete and Discuss:</b> Vocabulary Survey of Knowledge <b>*Read:</b> Section V: <i>Vocabulary</i> <b>*Read article:</b> A Focus on Vocabulary <b>*Review Ch. 1:</b> Structures of English <b>*Review types of PA</b> from the continuum <b>1.F.1: Formative Assessment:</b> <b>*Complete Study Guide for Section V:</b> <i>Vocab</i> <b>*Reflect: Why</b> the concern about vocabulary? <b>*Explain</b> how reading can improve expressive and receptive vocab, including oral language, listening, reading and writing. <b>*Teams read and record</b> key findings from assigned reading from <i>A Focus on Vocabulary</i> . Each team presents findings. A combined <b>summary</b> is created for the presentations. <b>1.F.2: Formative Assessment:</b> <b>*Complete Study Guide for Section V.</b> <b>*Use Alaska Adventure</b> text: <b>Choose</b> words that will need to be taught based on the 3 tiers. <b>*Identify</b> the morphemes within each word identified for instruction, including identifying Greek and Latin roots. <b>Explain</b> how this assists students with determining meaning of word(s) and supports comprehension. <b>Explain</b> reasoning for <b>why</b> words were chosen to teach from <i>Alaska Adventure</i> . <b>2.F.1 &amp; 2: Curriculum Study Assignment: Teaching Reading Sourcebook: Chpt 11 - Specific Word</b>
	<b>Chpt 12 - Word Learning Strategies</b>  <b>Chpt 13 – Word Consciousness</b>  <b>Article:</b> A Focus on Vocabulary: Lehr & Hiebert  <b>Words Their Way, Ch 3</b> by Bear, Templeton, et al  <b>HO and Activity:</b> <b>Word Part</b> <b>Clues...Meaning or Not?</b>	1.F.2   2.F.2	<b>Understand</b> morphology as it relates to vocabulary development (e.g., morphemes, inflectional and derivational morphemes, morphemic analysis). <b>Provide</b> for continual integration, repetition, and meaningful use of domain specific vocabulary to address the demands of academic language.	
				Summative Assessment

	<p><i>Instruction s: Identifying Primary Goal of Word Instruction:</i></p> <p><b>2.F.1 &amp; 2: Formative Assessment:</b>  <b>*Complete Study Guide for Chpt 11</b>          Specific Word Instruction section read.  <b>*Analyze</b> the different vocabulary terms.  <b>*Identify and discuss</b> with peers, methods of teaching cognates to ELLs, focusing on positive and negative transfer. <b>* Identify</b> multisensory activities for vocabulary instruction and its importance. Create explicit systematic instruction multisensory vocabulary lessons with peers to implement in classroom.</p>		
<p><b>Take photos of your print rich classroom and include in portfolio.</b></p>	<p><b>2.F.4: Formative Assessment:</b>  <b>*Describe</b> a print rich environment that provides multiple variety of genres of text to encourage reading and enhance vocabulary, including digital texts.  <b>*Reflection: Evaluate</b> your print rich classroom based on following:          -Does it provide a wide variety of genres?          -Does it provide books from a wide array of topics?          -Does it offer texts for ELLs?          -Does it provide digital text opportunities?  <b>Identify</b> the steps ensure your classroom supports and encourages <b>WIDE</b> reading.</p>	<p><b>Provide an environment that supports wide reading of print and digital, both information and literary to enhance vocabulary.</b></p>	
<p><b>*Select a text that your students will be reading. Identify</b> different elements of semantics, metaphors, similes or hyperbole to teach, including cognates to support ELLs. <b>Identify</b> the Greek and Latin roots of words for instruction.  <b>Determine</b> which words are basic academic words and domain specific.  <b>Identify</b> which words require more explicit instruction and time versus words that will require brief attention.  <b>Provide</b> written explanation of choices.  <b>Develop</b> a lesson and <b>teach</b> to class/students. <b>Reflect</b> on</p>	<p><b>2.F.3:5:7: Curriculum Study Assignment:</b>  <b>*View PowerPoint</b>  <b>*Read:</b> Ch. 11's <i>Selecting Words for ELLs and Word Tiers</i>; <i>Suggested Teaching Methods for ELLs</i>.  <b>*Read:</b> Ch. 12: <i>Word Learning Strategies: Cognate Awareness and Categories of Cognates in English and Spanish</i>  <b>*Study</b> Adams Model of skilled reading-semantic processor  <b>*Read:</b> Ch. 13 <i>Word Consciousness: Elements of Semantics, metaphors,</i></p>	<p><b>2.F.5*</b>  <b>Incorporate</b> instructional practices that develop authentic uses of English to assist English language learners in learning academic vocabulary and content. □  <b>Use</b> multiple methods of vocabulary instruction (e.g. multiple contexts, examples and non-examples, elaborations, etc.). □  <b>Incorporate</b> vocabulary instruction through analogies (e.g., cognates, Greek and Latin roots).  <b>Identify</b> principles of semantics as they relate to vocabulary</p>	
		<p><b>1.F.3</b></p>	

		<p>development (e.g., antonyms, synonyms, figurative language, etc.).</p>	<p>similes, hyperbole...  <b>2.F.3:5:7 Formative Assessment:</b>  <b>*Discuss</b> the connection between vocabulary and comprehension.  <b>*Identify</b> the Tier 3 words and words that could be an <b>advantage and/or problematic</b> for ELLS from <i>Alaska Adventure</i>. Provide reasons behind choices.  <b>*Use Alaska Adventure</b> passage:  <b>Individually choose</b> the 8 most important words that reflect meaning of text. Share words with table partners  <b>*Come to a group consensus</b> upon the 8 most important words that convey the meaning of passage <i>Alaska Adventure</i>.  <b>Write a 25 word or less summary</b> for the passage <i>Alaska Adventure</i> utilizing the 8 words. <b>Share words and summaries.</b> <b>*Reflect, discuss and discuss</b> the number of readings completed with the <i>Alaska Adventure</i> passage and the <b>different</b> purposes for each reading. <b>How</b> does this practice <b>support</b> vocabulary growth, fluency and comprehension? <b>Identify</b> multisensory tasks included in <b>each</b> task.  <b>*Complete Activity:</b> <i>Concrete vs. Abstract Meaning?</i> <b>Activity: Identify</b> words with concrete, abstract and/or multiple meanings. <b>Identify</b> how this is problematic for students, especially ELLs.  <b>*Reflect</b> upon participants' prior work with idioms and figurative language for ELLs.</p>	<p>effectiveness of lesson. <b>Support</b> with student work.</p>
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1.F.4	Understand the domain specific vocabulary demands of academic language.	<p><b>1.F.4: Curriculum Study Assignment.</b>  <b>*View PowerPoint</b>  <b>*Review: Teaching Reading</b>  Sourcebook, Ch. 11: Specific Word Instruction</p> <p><b>*HO: Word Part Clues... Meaning or Not?</b></p> <p><b>1.F.4: Formative Assessment:</b>  Complete <i>Word Part Clues... Meaning or Not?</i> Small groups <b>*Identify</b> if words provided have a root and/or a prefix. Does the prefix change meaning, doesn't, etc., examples, uncle, republic, repay?</p> <p><b>*Evaluate and identify how prefixes</b> change meanings of words.</p>	
1.F.5	Understand that writing can be used to enhance vocabulary instruction.	<p><b>1.F.5: Curriculum Study Assignment.</b>  <b>*View PowerPoint</b>  <b>*Review: Teaching Reading</b>  Sourcebook: Ch. 12: <i>Word Learning Strategies: Types of helpful and unhelpful context clues</i></p> <p><b>1.F.5: Formative Assessment:</b>  <b>*Review</b> provided texts and <b>identify</b> the helpful and unhelpful context clues and text features.  <b>With a partner create a semantic feature map</b> for a text to be taught to students. <b>Discuss</b> how the semantic feature map could be utilized to provide writing activities.</p>	
2.F.6	Use oral/aural language and writing experiences to enhance vocabulary (e.g., interactive word walls, word sorts, word charts for secondary). II	<p><b>2.F.6: Curriculum Study Assignment.</b>  <b>*View PowerPoint</b>  <b>* Review: Teaching Reading</b>  Sourcebook: Ch. 11: Specific Word Instruction</p> <p><b>*Review: Words Their Way, Ch. 3</b>  Making Words</p> <p><b>2.F.6: Formative Assessment:</b>  *Participants <b>practice</b> making word lessons in groups of 4-5.  * <b>In small group create two-word</b> sorts:  1) Social Studies; 2) Science. <b>Identify</b></p>	<p><b>Choose one of the following lessons/activities to complete and add to portfolio:</b></p> <p><b>1) Create</b> a making word lesson that targets specific phonics/spelling skill. <b>Teach</b> the lesson. <b>Reflect</b> upon the effectiveness of lesson. <b>Support</b> with student work.</p> <p><b>2) Choose one of the two-word</b> sorts lessons created: 1) Social Studies; 2) Science. <b>Have</b> students' sort. <b>Analyze</b> how students sorted the words.</p>

			<p>the <b>different</b> ways the words could be sorted. <b>Have</b> students' sort. <b>Analyze</b> how students' sort. <b>Identify</b> next steps for instruction.</p> <p><b>*Brainstorm with group</b> a list of words based on the following categories: geography, human body, holidays, bodies of water, desserts, boats, dogs.</p> <p><b>*Choose</b> one of the brainstormed categories and sort words into the 3 tiers, for example, Human Body; Tier 1) knee; Tier 2) kneecap; Tier 3) patella. <b>Reflect</b> on how type of activity would assist students.</p>	<p><b>Identify</b> next steps for instruction.</p> <p><b>3) Create</b> a semantic feature map, using one of the semantic word maps provided. <b>Such as</b> a map for how desserts are eaten, with a fork, spoon, fingers, tongue, straw, etc. <b>Teach.</b> <b>Identify</b> how this activity <b>supports</b> students, especially ELLs.</p>	
1.F.6	<p><b>Understand</b> the role of formal and informal vocabulary assessments to make instructional decisions to meet individual student needs.</p>	<p><b>1.F.6: Curriculum Study Assignment.</b></p> <p><b>*View PowerPoint</b></p> <p><b>*Study Words Their Way:</b> Spelling Inventories</p> <p><b>*Review: Words Their Way: Word Sorts</b></p> <p><b>1.F.6: Formative Assessment:</b></p> <p><b>*With</b> partner/small group analyze multiple samples of students' spellings to determine spelling placement, types of errors and instruction needed.</p> <p><b>2.F.8: Formative Assessment:</b></p> <p><b>*Administer</b> a grade-level appropriate spelling inventory to participants' students. <b>Score and analyze</b> results. <b>Identify</b> focus for instruction. <b>Share</b> with peers. <b>Discuss</b> and <b>identify</b> any adjustments to instruction.</p> <p><b>Note: If participant does not have an ELL student, participant should find an ELL to administer the spelling inventory.</b></p>			
2.F.8	<p><b>Recognize, describe, and incorporate</b> appropriate vocabulary assessments to guide instruction. ★</p>				

FOUNDATIONAL READING SKILL: INTEGRATION OF THE READING COMPONENTS				
Course Number and Name of Course	Required Course Reading	Indicator Code	Specific Indicator	Curriculum Study Assignment at Indicator Level with Built-In Formative Assessment
	<p><b>Articles from Colorin Colorado:</b> <i>Academic Language &amp; ELLS: What teachers need to know</i>  <i>What is the Difference Between Social &amp; Academic English?</i></p> <p><b>Video:</b> <i>Social vs Academic Language</i> (Cindy Lundgren)</p> <p><b>Teaching Reading Sourcebook:</b> Ch. 2 Structure of Spanish</p> <p><b>Article:</b> <i>Reading 101 for English Language Learners</i> by Colorin Colorado</p> <p><b>Articles from FIS (Frankfort International School):</b> <i>The English Language and The Differences Between English and French</i></p> <p><b>Article:</b> <i>Home Language, School Language</i> by Action Alliance for Children</p>	1.G.1	Identify language characteristics related to social and academic language.	<p><b>1.G.1: Curriculum Study Assignment:</b></p> <p><b>*View PowerPoint</b></p> <p><b>*Read articles:</b> <i>Academic Language and ELLS: What Teachers Need to Know and What is the Difference Between Social and Academic English?</i></p> <p><b>*Watch Video:</b> <i>Social vs Academic Language</i> (Cindy Lundgren)</p> <p><b>*Review WIDA article:</b> Features of Academic Language</p> <p><b>1.G.1: Formative Assessment:</b></p> <p><b>*Read</b> assigned sections of articles. <b>Identify</b> key terms and points. <b>Share</b> with group. <b>*Use</b> discussion questions as talking points to develop group presentations. <b>*Include</b> in presentations key terms, main ideas and instructional strategies that supports students, including accommodations for ELLS. <b>*Reflect and discuss</b> video. <b>How</b> will you incorporate into your classroom instruction?</p> <p><b>*Groups</b> compare three selections of provided text to identify the social and academic language characteristics of each.</p>
		1.G.2	Identify phonemic, semantic, and syntactic variability between English and other languages.	<p><b>1.G.2: Curriculum Study Assignment:</b></p> <p><b>*View PowerPoint</b></p> <p><b>Read articles:</b> <i>The English Language and The Differences Between English and French.</i></p> <p><b>*Read Article:</b> <i>Home Language, School Language</i> by Action Alliance for Children</p> <p><b>*Review: Teaching Reading Sourcebook Chpt 2:</b> English/Spanish Language Differences: Positive/Negative Transfer; Cognates</p> <p><b>1.G.2: Formative Assessment:</b></p>
		2.G.5	Demonstrate understanding of similarities and differences between home language and second language reading development.	

<p><b>WIDA HOs: CAN DO</b>          Descriptors; GO TO Strategies; Features of Academic Language; Examples of Sensory, Graphic and Interactive Supports and Strategies by Domain</p> <p><b>Article:</b> Accessing Skill Toward Successful Writing Development</p> <p><b>Pink and Say</b> by Patricia Polacco</p> <p><b>Article:</b> Speaking &amp; Listening in Content Area Learning- Fisher &amp; Frey</p> <p><b>Videos:</b> Anita Archer's Strategic Literacy Videos; scoe.org</p> <p><b>Video:</b> Anita Archer's Vocabulary Instruction for Kindergarten; youtube.com</p> <p>FSA and FLKRS Date</p>	<p>1.G.3</p>	<p><b>Understand</b> the interdependence between each of the reading components and their effect upon reading as a process for native speakers of English and English language learners.</p>	<p>*Using information provided from the articles, <b>identify</b> the most common errors that <b>cause</b> difficulty for ELLS learning English. <b>Identify</b> strategies and supports to use during instruction.</p> <p><b>2.G.5: Formative Assessment:</b></p> <p>*<b>Create</b> with partner/table group a brochure <b>explaining</b> the similarities and differences of home language while learning a second language, with a focus on the importance of honoring the home language. <b>Share brochures.</b></p> <p><b>1.G.3: Curriculum Study Assignment:</b></p> <p>*<b>View PowerPoint</b></p> <p>*<b>Read Reading 101 for English Language Learners</b></p> <p><b>1.G.3: Formative Assessment:</b></p> <p>*<b>Discuss</b> the 6 major components of reading and the barriers to reading <b>development for ELLS</b>, students of <b>poverty</b> and with learning <b>disabilities</b> and <b>dyslexia.</b></p> <p>*<b>Reflect</b> and discuss your students with needs. <b>Where</b> and <b>why</b> does reading break down? <b>What</b> barriers need to be removed?</p>	
<p>2.G.1</p>	<p><b>Apply</b> comprehensive instructional practices, including writing experiences that integrates the reading components. □</p>	<p><b>2.G.1: Curriculum Study Assignment:</b></p> <p>*<b>View PowerPoint</b></p> <p>*<b>Video:</b> Anita Archer's Strategic Literacy Videos; Clips #2 &amp; 6</p> <p><b>2.G.1: Formative Assessment:</b></p> <p>*<b>Participants</b> take notes on both videos, share and discuss with peers. Identify how they will apply the instructional practices that integrates writing and the reading components.</p>	<p>*<b>Choose</b> a literary <i>and</i> informational text that will be taught: <b>Have students individually</b> choose the <b>8</b> most important words to teach. <b>Students share</b> their 8 words with partners. <b>Partners compare</b> lists and <b>come to consensus</b> upon <b>8</b> words. Students <b>create only ONE list of 8</b> words.</p> <p>*<b>Together students write</b> a 25 word or less summary of the passage utilizing the <b>8</b> words. <b>*Discuss the effectiveness of the activity. Was</b> students' vocabulary knowledge and comprehension enhanced? <b>Were</b> the written summaries comprehensive and conveyed the message of the text?</p>	

	<p><b>1.G.4: Curriculum Study Assignment.</b>  <b>*View Videos:</b> Anita Archer's <i>Vocabulary Instruction for Kindergarten and Middle School Students</i>  <b>1.G.4: Formative Assessment:</b>  <b>*Participants</b> take notes on both videos, share and discuss with peers the following: identify the promotion of oral language in each video, the level of explicit instruction, how differentiate, how students were actively engaged, and assessment completed during the lessons.  <b>*Reflect: Respond</b> to the following:  <b>How</b> does the learning environment <b>impact</b> reading development and comprehension?  <b>How</b> does your classroom <b>support</b> oral language, writing and reading?  <b>Are</b> there needed changes to your classroom? <b>Identify</b> the changes.</p>	<p><b>Understand</b> the impact of oral language, writing, and an information intensive environment upon reading development.</p>	
	<p><b>2.G.3 &amp; 4: Curriculum Study Assignment.</b>  <b>*Review articles, Sourcebook and portfolio artifacts</b> of how to create print rich classroom environments with diverse libraries from a variety of genres, student interests, primary documents and current and historical events in both print and digital texts.  <b>2.G.3 &amp; 4: Formative Assessment:</b>  <b>*Reflect and Discuss: What</b> is an information intensive environment?  <b>Describe how</b> your print and language rich classroom has 1) the students at the forefront 2) it is information intensive 3) provides for student selected books.  <b>What</b> research-based guidelines do you <b>use</b> when creating a language, print and digital rich classroom?</p>	<p><b>Use</b> resources and research-based practices that create information intensive environments (e.g., diverse classroom libraries, inquiry reading). □</p> <p><b>Use</b> research-based guidelines for selecting literature and domain specific print and digital text appropriate to students' age, interests and reading proficiency (e.g., young adult literature, informational texts).</p>	



	<p><b>Understand</b> the importance of comprehension monitoring and self-correcting to increase reading proficiency.</p>	<p><b>1.G.5:</b> Curriculum Study Assignment.  <b>*View PowerPoint</b>  <b>*Review:</b> Section VI Comprehension Fundamentals  <b>*Review following:</b>      Before, during, after strategies      Comprehension strategies      Metacognition      Click or Clunk  <b>1.G.5: Formative Assessment:</b>  <b>*Review:</b> Completed Study Guide for Section IV: Comprehension Fundamentals  <b>*Each group</b> creates a chart of comprehension monitoring strategies with steps to implement each. <b>Share.</b>  <b>*Each group selects</b> a content passage from a classroom textbook, <b>identify</b> the reading <b>demands</b>, areas of <b>challenge</b> (vocabulary, etc.) and <b>barriers for ELLS</b> and students with <b>disabilities</b>. <b>* Identify</b> the <b>supports needed</b> to ensure all students have access to the text.</p>	
<p><b>1.G.5</b></p>		<p><b>2.G.2:</b> Curriculum Study Assignment.  <b>*View PowerPoint</b>  <b>*Introduce</b> participants to the NY Times What's Going on In This Picture? HO: Close Reading of Photos  <b>2.G.2: Formative Assessment:</b>  <b>*Facilitator Models</b> a close reading of a photo. <b>*Participants</b> take notes.  <b>Participants</b> practice in groups a close reading of photos lesson with provided photos.  <b>*Facilitator Models</b> a close reading lesson with text dependent questions from a selection of <i>Pink and Say</i>.  <b>*Participants</b> practice in groups a close reading text lesson with text dependent</p>	
			<p><b>*Choose a photo</b> and a short passage and <b>develop</b> a close reading lesson for each. <b>*Teach</b> lesson.  <b>*Reflect</b> and <b>provide written analysis</b> of the <b>effectiveness</b> of the lesson.  <b>*Include</b> any <b>changes</b> you would make to future lesson.</p>

				<p>questions. <b>*Participants</b> discuss and reflect upon the benefits of close reading lessons.</p>	
1.G.6		<p><b>Understand</b> the role of formal and informal reading assessment to make instructional decisions to meet individual student needs.</p>	<p><b>1.G.6 &amp; 2.G.6: Curriculum Study Assignment.</b></p>		<p><b>*Examine</b> 2 years of FSA and/or Reading for Kindergarten (FLKRS) state data for your class.</p>
2.G.6		<p><b>Triangulate</b> data from appropriate reading assessments to guide instruction. ★</p>	<p><b>*Review</b> completed study guides for each chapter, articles and completed assignments.</p>		<p><b>*Identify</b> areas of growth needed from <b>FSA or FLKRS</b> data from your class based. <b>*Summarize</b> changes from one year to the next, highlighting growth, declines, including student groups.</p> <p><b>*Triangulate the data for ELLs and identify</b> the next steps required based on your students' strengths and needs to guide your instructional practice.</p> <p><i>*Participants provide their cumulative portfolios of all completed participant assignments, research, student artifacts, reflections, etc. for Competencies.</i></p> <p><i>*Complete and present case study for approval.</i></p>

## Competency 3: Foundations of Assessment

		Teachers will understand how to select and administer appropriate assessments and analyze data to inform reading instruction to meet the needs of all students. Teachers will engage in the systematic problem-solving process.			
Course Number and Name of Course	Required Course Reading	Indicator Code	Specific Indicator	Curriculum Study Assignment at Indicator Level with Built-In Formative Assessment	Summative Assessment
01-013-008: Foundations of Assessment	<p><b>What teachers need to know about assessment.</b> (Rudner, L.M. &amp; Schafer, W.D.)</p> <p><b>Florida Literacy and Reading Excellence Professional Papers</b> (Just Read Florida! 2013)</p> <p><b>Assessing Reading: Multiple Measures, 2<sup>nd</sup> Edition</b> by Linda Diamond and B.J. Thorsnes</p> <p>ESOL Testing  <a href="http://www.apa.org/science/faithtestcode.html">http://www.apa.org/science/faithtestcode.html</a></p> <p>Teaching children to read: An evidence-based assessment of the scientific research literature on reading and its implications for reading instruction. (National Reading Panel</p>	3.1	<p><b>Understand and apply</b> measurement concepts and characteristics of reading assessments.</p>	<p>a. Participants will <b>administer</b> a diagnostic assessment, <b>analyze</b> this data along with progress monitoring data and FSA scores. b. Participants will <b>apply</b> data results to <b>create</b> a prescription for reading issues that are discovered</p>	<p><b>*Participants will maintain a cumulative portfolio of all completed participant assignments, research, student artifacts, reflections, etc. for Competency 3 adding to Competencies 1 and 2 portfolios.</b></p> <p>a. Participants will <b>complete</b> the Assessment/Curriculum Decision Tree for Reading Improvement Grades 3-12 form, results of administered assessments, final case study turned in.</p> <p>b. In a "Pause and Reflect" journal, <b>answer</b> the question "What's next?"</p>
		3.2	<p><b>Understand</b> the purposes of various <b>informal assessments</b> (e.g., informal reading inventories, analyzing writing samples) including an emphasis on matching reader to text.</p>	<p>a. Participants will <b>view</b> a PowerPoint; participate in a discussion of various assessments both informal and formal available in each district.</p> <p>b. Participants will be <b>introduced</b> to "Assessing Reading Multiple Measures Revised 2<sup>nd</sup> Edition." (CORE Literacy Training Series).</p>	<p>a. Participants will <b>complete</b> multiple informal assessments (Cloze/Maze) that will include a running record and reading fluency measurement on a student.</p> <p>b. Participants will <b>fill</b> in a multidimensional fluency chart and miscue analysis form.</p> <p>c. Participants <b>collaborate</b> and <b>explain</b> the purpose of using informal assessments to match reader with text.</p>
		3.3	<p><b>Understand</b> the purpose of various formal assessments</p>	<p>Participants will be <b>presented</b> with various terms including norm</p>	<p>a. Participants will <b>self-assess</b> whether the words are Known, Unknown, Acquainted, through a <b>kinesthetic</b> activity requiring them to move to</p>

	<p>(NRP). (2000).</p> <p><b>Measure for Measure. A Critical Consumers Guide to Reading Comprehension Assessments for Adolescents.</b> (Leila Morsy, Harvard Graduate School of Education, Michael Kiefer, Teachers College, Columbia University, Catherine Snow, Harvard School of Education.)</p>	<p>including the differences between norm-referenced and criterion-referenced assessments and how to interpret data reports.</p>	<p>referenced and criterion-referenced</p>	<p>different locations around the classroom depending on their experience level with the assessment terms. b. Participants will <b>complete</b> a chart that requires them to link the terms with county utilized assessments.</p>
3.4	<p><b>Guiding Tools for Instructional Problem Solving.</b> (Florida Department of Education, Bureau for Exceptional Education and Student Services) (2011).</p> <p><b>Performance Assessment: A Key Component of a Balanced Assessment System.</b> (Douglas G. Wren, Ed, D, Assessment Specialist Department of Research Evaluation, and Assessment)</p>	<p><b>Understand</b> the meaning of test reliability, validity, and standard error of measurement and describe major types of derived scores from standardized tests.</p>	<p>Participants will be <b>presented</b> with various terms including reliability, validity and standard error of measurement.</p>	<p>Participants will <b>self-assess</b> whether the words are Known, Unknown, Acquainted, through a <b>multisensory</b> activity requiring them to move to different locations around the classroom depending on their experience level with the assessment terms. b. Participants will <b>complete</b> a chart that requires them to link the terms with district utilized assessments.</p>
3.5	<p><b>Accommodations</b> (<a href="http://www.fldoe.org/ese/fs_aasd/asp">http://www.fldoe.org/ese/fs_aasd/asp</a>)</p> <p><b>Florida Alternative Assessment</b> (<a href="http://fldoe.fldoe.org/asp/alt_assessment.asp">http://fldoe.fldoe.org/asp/alt_assessment.asp</a>)</p>	<p><b>Demonstrate</b> knowledge of the characteristics, administration, and interpretation of both quantitative and qualitative and qualitative instructional assessments (to include each of the following: screening, progress monitoring, diagnosis and outcome measures).</p>	<p>Participants will <b>analyze</b> Assessment Period (AP) 1 data, progress monitoring data and FSA data.</p>	<p>Participants will <b>identify</b> and <b>determine</b> the difference between their data scores results and <b>analyze</b> the score results that would indicate students making adequate yearly progress in reading</p>
3.6	<p><b>Florida Alternative Assessment</b> (<a href="http://fldoe.fldoe.org/asp/alt_assessment.asp">http://fldoe.fldoe.org/asp/alt_assessment.asp</a>)</p>	<p><b>Understand</b> how to use data within a systematic problem-solving process to</p>	<p>Participants will be <b>presented</b> with <i>Assessing Reading Multiple Measures Revised 3<sup>rd</sup></i></p>	<p>Participants will <b>use</b> this book in <b>addition</b> to other instructor provided resources to <b>identify</b> students' strengths, needs, and recommendations after each assessment given.</p>
3.7				

<p><b>Basic reading inventory: Pre-primer through grade twelve and early literacy assessments.</b> (Johns, J.) (2001)</p> <p><b>Characteristics of Effective Assessment Portfolios.</b> (Adapted from Arter, J.S. and Spandel, V. (2002).)</p> <p><b>Using portfolios of student work in assessment and education.</b> (<i>Educational Measurement: issues and Practice</i>, 11(1), 36-44.)</p>	<p>differentiate instruction, intensify intervention and meet the needs of all students. (e.g., grouping practices, appropriate curriculum materials).</p> <p><b>Identify</b> appropriate criteria for selecting materials to include in portfolios for monitoring student progress over time.</p>	<p><i>Edition. (CORE Literacy Training Series).</i> Participants will also receive instructor provided materials and guidance in a variety of reading strategies to <b>use</b> to support student growth and achievement.</p> <p>Participants will be <b>presented with information</b> about portfolios as a progress monitoring tool. b. Participants will receive <b>guidelines</b> for both the elementary and secondary reading curriculums for Good Cause Exemption portfolios.</p>	<p>b. Participants will <b>complete</b> a final case study of all these strengths needs and recommendations</p>	
<p>3.8</p>	<p><b>Identify</b> interpretive issues that may arise when assessments in English are used to measure reading proficiency in English language learners.</p>	<p>Participants will be <b>informed</b> with various <b>concerns</b> for each of the assessments when applied to ELL students.</p>	<p>Participants will <b>identify</b> different measures and strategies for reading improvement <b>using</b> their Pause and Reflect journal, in <b>addition</b> to artifacts to include in students' GCE portfolios.</p>	<p>In a "Pause and Reflect" journal, participants will <b>identify</b> issues of concern for each assessment when <b>applied</b> to ELL students.</p>
<p>3.9</p>	<p><b>Identify</b> appropriate assessments and accommodations for monitoring reading progress of all students.</p>	<p>Participants will be <b>informed</b> of a number of reading assessments to <b>monitor</b> student progress. B. Participants will <b>use</b> the resource <i>Assessing Reading Multiple Measures Revised 2<sup>nd</sup> Edition (CORE Literacy Training Series)</i> to <b>identify</b> the <b>appropriate</b> assessment based on data.</p>	<p>Participants will <b>analyze</b> the results of a variety of reading measures (phonological awareness, fluency, running records, etc.) to <b>prescribe</b> fix-it strategies for students.</p> <p>Participants will <b>review</b> assessments administered in Competencies 1 and 2 and case studies for further <b>analysis</b>.</p>	<p>Participants will <b>analyze</b> the results of a variety of reading measures (phonological awareness, fluency, running records, etc.) to <b>prescribe</b> fix-it strategies for students.</p> <p>Participants will <b>review</b> assessments administered in Competencies 1 and 2 and case studies for further <b>analysis</b>.</p>
<p>3.10</p>	<p><b>Identify</b> and</p>	<p>Participants will be <b>informed</b> of a number of reading assessments to <b>monitor</b> student progress. B. Participants will <b>use</b> the resource <i>Assessing Reading Multiple Measures Revised 2<sup>nd</sup> Edition (CORE Literacy Training Series)</i> to <b>identify</b> the <b>appropriate</b> assessment based on data.</p>	<p>Participants will use their Pause and Reflect</p>	<p>Participants will use their Pause and Reflect</p>
<p>3.11</p>	<p><b>Identify</b> and</p>	<p>Participants will be</p>	<p>Participants will use their Pause and Reflect</p>	<p>Participants will use their Pause and Reflect</p>

			<p>implement appropriate and allowable accommodations as specified in the Individual Education Plan or 504 Plan when assessing students with disabilities in the area of reading.</p>	<p><b>presented with various scenarios to identify</b> concerns for each of the assessments when <b>applied</b> to students on an IEP or 504 Plan.</p>	<p>journal to <b>identify</b> issues of concern for each assessment when <b>applied</b> to students on an IEP or 504 Plan.</p> <p><i>*Participants provide their cumulative portfolios of all completed participant assignments, research, student artifacts, reflections, etc. for Competency 3, adding to Comps 1 and 2 portfolios.</i></p>

Note: An official college transcript for coursework that meets Competency 5 requirements applies to competencies 1 through 5.

## Competency 4: Foundations & Applications of Differentiated Instruction

Teachers will have a broad knowledge of students from differing profiles in order to understand and apply research-based instructional practices by differentiating process, product, and context. Teachers will engage in the systematic problem-solving process.

Course Number and Name of Course	Required Course Reading	Indicator Code	Specific Indicator	Curriculum Study Assignment at Indicator Level with Built-In Formative Assessment	Summative Assessment
01-013-009: Foundations and Applications of Differentiated Instruction	<p><b>The Differentiated Classroom: Responding to the Needs of All Learners</b> (Tomlinson, 1999)</p> <p><b>Where Have All the Bluebirds Gone?</b> (Caldwell &amp; Ford, 2002)</p> <p><b>Understanding ESL Learners: Moving Toward Cultural Responsiveness-A Guide for Teachers</b> (ESL Council of the Alberta Teachers' Association, 2007)</p>	4.1	<p>Understand and apply knowledge of socio-cultural, socio-political and psychological variables to differentiate reading instruction for all students.</p>	<p>a. Read article "Socio-cultural, Social – Political, and Psychological Variables". Participants will read and have <b>dialogue</b> with the facilitator and other participants about the article. This guide discusses the diverse backgrounds of English language learner (ELL) students and the need for understanding cultural differences and the nature of second language learning. Advice is provided on creating an active learning instructional model and a supportive environment where ELL students can create their own learning.</p>	<p><b>*Participants will maintain a cumulative portfolio of all completed participant assignments, research, student artifacts, reflections, etc. for Competency 4 adding to Competencies 1, 2 and 3 portfolios.</b></p> <p>a. <b>Demonstrate</b> understanding by reading and summarizing in their reflective journal.</p> <p>b. Participants will <b>describe</b> how they differentiate reading instruction for all students through class discussion.</p> <p>c. Participants will be asked to <b>pause and reflect</b> on how they <b>create</b> a culturally responsive classroom within their reading instruction.</p>
	<p><b>Stages of English Language Acquisition</b> (Hill &amp; Bjork, 2008)</p>	4.2	<p>Understand the stages of English language acquisition for ELLs and differentiate reading instruction for students at different levels of English language proficiency.</p>	<p>Participants will read and have <b>dialogue</b> with the facilitator and other participants about the theories of Second Language Acquisition.</p>	<p><b>Jigsaw</b> groups will <b>present</b> the characteristics of the five language acquisition stages along with <b>how</b> to differentiate reading instruction for each level.</p>
	<p><b>Overview of Second Language Acquisition Theory</b> (NREL, 2003)</p> <p><b>Cummins'</b></p>	4.3	<p>Understand and apply current theories of second language acquisition to differentiate instruction for English language learners of diverse backgrounds and various levels of prior education.</p>	<p>"Reading Supports for All", by J. Fitzgerald and M.F. Graves, December 2004/January 2005, Educational Leadership, 62(4), pp. 68-71.</p> <p>Source: The Common Sense of</p>	<p>Participants will <b>read and discuss</b> the article "Action Research Case Study Project with ELL Student".</p>

	<p><b>Framework for Evaluating Language Demand in Content Activities</b> (Cummins, 1984)</p> <p><b>Differentiated Instruction for English Language Learners</b> (Coelho, 2012)</p> <p><b>Developmental Psychology: Incorporating Piaget's and Vygotsky's Theories in Classroom</b> (Blake &amp; Pope, p.59-67, 2008)</p> <p><b>Fluency: The Bridge from Decoding to Reading Comprehension</b> (Pikulski &amp; Chard, 2003)</p> <p><b>Summary of Big Ideas-Explicit Instruction</b> (Archer, 2010)</p> <p><b>Florida Literacy and Reading Excellence Professional Papers</b> (Just Read Florida, 2013)</p> <p><b>"Reading Supports for All"</b>, (Fitzgerald &amp; Graves, p.68-71, 2005)</p>	<p>4.4</p> <p><b>Identify</b> factors impeding student reading development in each of the reading components or the integration of these components.</p> <p>4.5</p> <p><b>Recognize</b> how characteristics of both language and cognitive development impact reading proficiency.</p> <p>4.6</p> <p><b>Recognize</b> the characteristics of proficient readers to more effectively differentiate instruction.</p> <p>4.7</p> <p><b>Compare</b> language, cognitive, and reading acquisition of different age groups (primary, intermediate, secondary levels) and abilities</p> <p>4.8</p> <p><b>Select and use</b> developmentally appropriate materials that address sociocultural and linguistic differences.</p> <p>4.9</p> <p><b>Plan</b> for instruction that utilizes increasingly complex print and digital text, embeds assessment, includes scaffolding, and provides re-teaching when necessary for individuals and small groups.</p>	<p>Differentiation: Meeting Specific Learner Needs in the Regular Classroom (ASCD Facilitators' Guide, p.198-202)</p> <p><b>PowerPoint Activity:</b> Participants read aloud in triads, 3 passages at different readability levels S2-8-S2-10. Complete anticipation guide to determine level of knowledge on the factors impeding reading development.</p> <p>PowerPoint <b>identifies</b> the affecting reading comprehension.</p> <p><b>Read</b> a class scenario: Differentiation in a Science Classroom.</p> <p>Power Point Presentation that <b>outlines</b> the differences between successful and struggling readers in the area of word study, fluency, vocabulary and comprehension.</p> <p>Information provided via a PowerPoint that <b>addresses</b> the cognitive and reading developmental stages from birth through adulthood.</p> <p>a. Power Point presentation that <b>addresses</b> the different scaffolding strategies by <b>planning</b> for more explicit and systematic instruction.</p> <p>b. Participants <b>read</b> about <b>how</b> to embed assessment so that appropriate levels of instruction can be provided.</p>	<p>a. Participants <b>observe</b> and <b>record</b> reading behaviors during activity as a whole class.</p> <p>b. Participants will <b>chart</b> observations to <b>explain</b> the factors impeding student reading.</p> <p>Participants will <b>reflect</b> on the factors that could <b>affect</b> students reading comprehension.</p> <p>a. <b>How</b> these factors manifest.</p> <p>b. <b>How</b> can teachers differentiate</p> <p>a. <b>Record</b> observations in the reflection log</p> <p>b. <b>Class Discussion</b></p> <p><b>Complete</b> chart that will delineate between struggling and successful readers and the strategies that they will use.</p> <p>a. <b>Read and reflect</b> with a written summary of session highlights by completing the questions provided.</p> <p>b. <b>Describe</b> the different theories and <b>how</b> they <b>apply</b> to differentiated instruction.</p> <p>c. <b>Read and Reflect</b> on <b>how</b> to plan and implement centers that are <b>created using</b> assessment data and students' interest.</p> <p>d. <b>Integrate multisensory</b> components to <b>plan</b> instruction based on individual student needs.</p>
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	<p><b>The Common Sense of Differentiation: Meeting Specific Learner Needs in the Regular Classroom</b> (ASCD Facilitators' Guide, p.198-202)</p>	4.10	<p><b>Differentiate</b> reading instruction for English language learners with various levels of first language literacy.</p>	<p>PowerPoint Presentation that <b>addresses</b> the factors that <b>impede</b> development for ELL with various levels of first language literacy.</p>	<p>Participants will <b>work</b> in small groups to <b>develop</b> activities that will <b>target</b> factors impeding comprehension based on levels of first language literacy.</p>
		4.11	<p><b>Scaffold</b> instruction for students having difficulty in each of the components of reading.</p>	<p>PowerPoint Presentation that includes <b>research</b> by Graves and Braaten (1996) focusing on scaffolded instruction and how it is implemented in the classroom.</p>	<p>a. Participants will <b>critique</b> sample lessons and <b>address</b> the level of support students need. b. Plans will be <b>revised</b> to <b>provide</b> explicit and systematic instruction.</p>
		4.12	<p><b>Implement</b> a classroom level plan for monitoring student reading progress and differentiating instruction.</p>	<p>PowerPoint Presentation will provide <b>information</b> on the data sources that can be collected in the classroom to <b>monitor</b> student reading progress.</p>	<p>In small groups, participants will <b>develop</b> a plan to monitor students' progress <b>focusing</b> on fluency and comprehension.</p>
		4.13	<p><b>Monitor</b> student progress and <b>use</b> data to differentiate instruction for all students.</p>	<p>PowerPoint Presentation will provide information on the <b>data sources</b> that can be collected in the classroom to <b>monitor</b> student reading progress.</p>	<p>In small groups, participants will <b>use</b> the plan they <b>developed</b>, and <b>discuss how</b> to collect data to <b>show</b> growth over time.</p>
		4.14	<p><b>Implement</b> research-based practices in comprehension, oral language, phonological awareness, phonics, fluency and vocabulary to differentiate instruction for all students.</p>	<p>a. Participants will <b>read</b> professional papers on, fluency, and reading Comprehension. b. PowerPoint Presentation on phonemic awareness (PA), phonics, oral language and vocabulary that <b>identifies</b> strategies that focus on differentiation in reading.</p>	<p><b>Create</b> an instructional plan that <b>targets</b> PA, phonics and oral language focusing on differentiated strategies that <b>ensure</b> that ELLs and students with disabilities are <b>supported</b>.</p>
		4.15	<p><b>Implement</b> research-based instructional practices for developing students' higher order thinking.</p>	<p>PowerPoint Presentation that <b>identifies</b> the different data sources that can be <b>used</b> to <b>develop</b> students higher order thinking skills.</p>	<p><b>Implement</b> an instructional plan that <b>targets</b> higher order questioning techniques, <b>focusing on developing</b> students higher order thinking skills. Plan will include <b>multisensory</b> activities that <b>support</b> all learners.</p>
		4.16	<p><b>Implement</b> research-based instructional practices for developing students' ability to read critically.</p>	<p>Participants will <b>read</b> professional paper on reading comprehension to <b>identify</b> comprehension strategies that will assist teachers in identifying instructional comprehension strategies that will assist students in reading critically.</p>	<p><b>Design and implement</b> an instructional plan that focuses on students developing their vocabulary and comprehension skills to increase their ability to read critically.</p>
		4.17	<p><b>Implement</b> research-based</p>	<p>Participants will <b>read</b> professional</p>	<p><b>Design and implement</b> an instructional</p>

		<p>instructional practices using writing to develop students' comprehension of text.</p> <p><b>Implement</b> appropriate and allowable instructional accommodations as specified in the Individual Education Plan or 504 Plan when differentiating instruction for students with disabilities.</p> <p><b>Modify</b> assessment and instruction for students with significant cognitive disabilities while maintaining high expectations for achievement that reflect appropriate levels of access to general education instruction.</p>	<p>papers that identify instructional practices that can be used in writing to develop student's comprehension.</p> <p>PowerPoint Presentation that <b>addresses</b> the different <b>scaffolding</b> strategies by <b>planning</b> for more explicit and systematic instruction. <b>Embedding</b> assessment so that appropriate levels of instruction can be provided.</p> <p>PowerPoint Presentation that includes information on Access Points, and <b>how to adapt</b> standards-based instruction based on students' individual needs. Also, it will provide an overview of the <i>Florida Alternative Assessment</i>.</p>	<p>plan that focuses on vocabulary and comprehension that fosters the reading/writing connection.</p> <p><b>Explain</b> how content, product, and/or process will be <b>differentiated</b> to meet students' needs <b>identified</b> in their IEP or 504 plans.</p>
4.18				<p><b>Explain</b> how curriculum can be <b>modified</b> by using assessment to help students obtain their optimum learning goals. <i>*Participants provide their cumulative portfolios of all completed participant assignments, research, student artifacts, reflections, etc. for Competency 4, adding to Competencies 1, 2 and 3.</i></p>
4.19				

Note: An official college transcript for coursework that meets Competency 5 requirements applies to competencies 1 through 5.

## Competency 5: Demonstration of Accomplishment

Competency 5: Demonstration of Accomplishment				
Teachers will, through a culminating practicum, demonstrate knowledge of the components of reading, as well as assessments and data analysis, to implement a comprehensive research-based reading plan of instruction for all students. Teachers will engage in the systematic problem-solving process.				
Course Number and Name of Course	Required Course Reading (if there are no required readings, put N/A in the column.)	Indicator Code	Specific Indicator	Curriculum Study Assignment at Indicator Level with Built-In Formative Assessment
01-013-010: Demonstration of Accomplishment Reading Practicum	<p><b>Article:</b> <i>Role of Early Language in Literacy Development:</i> Shanahan &amp; Lonigan</p> <p><b>Article:</b> <i>Five Components of Effective Oral Language Instruction</i></p> <p><b>Teaching Reading Sourcebook: The Big Picture; MTSS for Reading Success;</b> Chpt 5, <i>Phonological Awareness;</i> Chpt 6, <i>Phonics</i></p> <p><b>Article:</b> <i>Reading Rockets: Teacher Practices that Impact Reading Motivation</i></p> <p><b>Teaching Reading Sourcebook: Section IV: Reading Fluency;</b> Chpts 9 &amp; 10, <i>Fluency Assessment &amp; Instruction</i></p> <p><b>Teaching Reading Sourcebook: Section V: Vocabulary Introduction;</b> Chpts 11-13, <i>Specific Word</i></p>	5.3	<p><b>Demonstrate</b> research-based instructional practices for developing <b>oral/aural language</b> development. ★</p>	<p>Summative Assessment</p> <p>*Participants maintained a portfolio for competencies 1-4 with lesson plans, reflections, student work, observation feedback and artifacts. *Participants will complete a portfolio for Competency 5. 5.1; 5.3; 5.14 - Demonstration through use of lesson plans and delivery of instruction that integrates multiple skills/strategies 1) for oral/aural language; 2) to motivate and engage students; 3) use of assessment and data analysis to guide instruction. *Participants will demonstrate their job-embed understanding of reading as a process and application of the principles of reading: comprehension, oral language, phonological awareness, phonics, fluency and vocabulary through: A) Observations and/or videos of instruction with whole and small groups viewed, monitored and evaluated by district personnel, principal and/or reading coach. B) Reflection Journal (RJ): What worked well/didn't? Changes to lesson/instruction? Effective vs ineffective? Student level of engagement/assessment? C) Data analysis of student work. 5.1; 5.3; 5.14: Completion of 3 ongoing case studies that profiles 3 students: 1 below grade and/or ELL student; 1 on grade level and 1 above, including</p>
		5.1	<p>Use assessment and data analysis to monitor student progress and guide instruction over time to ensure an increase in student learning. ★</p>	<p><b>Curriculum Study Assignment:</b> 5.1 - Review: The Big Picture 5.1 - Read: MTSS for Reading Success <b>Formative Assessment:</b> 5.1 - Complete a case study using pre/post assessments, monitoring, instructional practices, strategies, intervention and next steps to increase student learning. 5.1 - Demonstration through use of assessment and data analysis to develop lesson plans and delivery of instruction that ensures an increase in student learning.</p> <p><b>Curriculum Study Assignment:</b> 5.14 - Read: <i>Teacher Practices that Impact Reading Motivation</i> 5.14 - Review: Competencies 1-4 for instructional practices, strategies and articles. (See Portfolio) <b>Formative Assessment:</b> 5.14 - Demonstration through use of lesson plans and delivery of instruction that integrates multiple skills/strategies to motivate and engage students in reading.</p>
		5.14	<p>Use a variety of instructional practices to motivate and engage students in reading. ★</p>	

<p><i>Instruction; Word-Learning Strategies; Word Consciousness</i></p> <p><b>Article:</b> IRIS Center: <i>Helping Students Become Independent Learners</i></p> <p><b>Teaching Reading Sourcebook: Section VI: Comprehension;</b> Chpts 14-15, <i>Literary Text &amp; Informational Text</i></p> <p><b>Article:</b> ASCD: 5 <i>Ways to Develop Critical Thinking Skills</i></p> <p><b>Article:</b> Research Gate: <i>Employing Critical Reading Strategy to Promote Students' Higher Order Thinking Skills</i></p> <p><b>Article:</b> ASCD: <i>Complex Text &amp; Disciplinary Text</i></p> <p><b>Article:</b> <i>Strategies to Help Students Go Deep When Reading Digitally</i></p> <p><b>Article:</b> ILA: <i>Writing to Read: Evidence for How Writing Can Improve Reading</i></p> <p><b>Article:</b> <i>Explicit Writing Instruction –</i></p>	<p>5.4</p>	<p><b>Demonstrate</b> research-based instructional practices for developing students' <b>phonological awareness</b>. ★</p>	<p><b>Curriculum Study Assignment:</b>  <b>5.4 &amp; 5: Review:</b> Competencies 1-4 for instructional strategies and articles. (<b>See Portfolio</b>)  <b>5:4: Review:</b> Chpt 5, Phonological Awareness  <b>5:5: Review:</b> Chpt 6, Phonics  <b>Formative Assessment:</b>  <b>5.4 &amp; 5.5: *Demonstration</b> through lesson plans and <b>delivery</b> of instruction that integrates multiple skills/strategies for <b>phonological awareness and phonics</b>.</p>	<p>student work that demonstrates knowledge, effective instruction and analysis of <b>EACH INDICATOR</b>.</p> <p><b>*Demonstration</b> through lesson plans and <b>delivery</b> of instruction that integrates multiple skills/strategies for <b>phonological awareness and phonics</b>. *Teacher observations and/or <b>videos</b> of instruction with whole and small groups <b>viewed, monitored, and evaluated by district personnel, principal and/or reading coach</b>.  <b>*Reflection:</b> What worked well/didn't? Changes to lesson/instruction? Effective vs ineffective? Student level of engagement/assessment?  <b>*Identify the phonological awareness and phonics</b> practices included in the 3 case studies.</p>
<p>5.5</p>	<p><b>Demonstrate</b> research-based instructional practices for developing <b>phonics</b> skills and word recognition. ★</p>	<p><b>Curriculum Study Assignment:</b>  <b>5.4 &amp; 5: Review:</b> Competencies 1-4 for instructional strategies and articles. (<b>See Portfolio</b>)  <b>5:4: Review:</b> Chpt 5, Phonological Awareness  <b>5:5: Review:</b> Chpt 6, Phonics  <b>Formative Assessment:</b>  <b>5.4 &amp; 5.5: *Demonstration</b> through lesson plans and <b>delivery</b> of instruction that integrates multiple skills/strategies for <b>phonological awareness and phonics</b>.</p>	<p>student work that demonstrates knowledge, effective instruction and analysis of <b>EACH INDICATOR</b>.</p>	

<p>Jocelyn Seamer  <b>Article: Academic Language &amp; ELLs: What teachers need to know</b>  <b>Article: Reading 101 for English Language Learners</b>  <b>Teaching Reading Sourcebook: Chpt 2; Structure of Spanish</b></p>	<p>5.6</p>	<p><b>Demonstrate</b> research-based instructional practices for developing reading <b>fluency</b> and reading endurance. ★</p>	<p><b>Curriculum Study Assignment:</b>  <b>5.6: Review:</b> Competencies 1-4 for instructional strategies and articles. (See <b>Portfolio</b>)  <b>Review:</b> Section IV: Reading Fluency; Chpts 9 &amp; 10, Fluency Assessment, completed study guides and research-based instructional practices.  <b>5.6: Formative Assessment:</b>  <b>*Demonstration</b> through lesson plans and delivery of instruction that <b>integrates</b> multiple skills/strategies for <b>fluency</b>.</p>	<p><b>*Demonstration</b> through lesson plans and delivery of instruction that <b>integrates</b> multiple skills/strategies for <b>fluency</b>.  <b>*Teacher observations</b> and/or <b>videos</b> of instruction with whole and small groups <b>viewed, monitored and evaluated by district personnel, principal and/or reading coach</b>.  <b>*Reflection:</b> What worked well/didn't? Changes to lesson/instruction? Effective vs ineffective? Student level of engagement/assessment?  <b>*Identify</b> the <b>fluency</b> practices included in the 3 case studies.</p>
<p>5.8</p>	<p><b>Demonstrate</b> research-based instructional practices to facilitate students' monitoring and self-correcting in reading. ★</p>	<p><b>Curriculum Study Assignment:</b>  <b>5.8: Review:</b> Competencies 1-4 for instructional strategies and articles. (See <b>Portfolio</b>)  <b>Article: Research Gate: Employing Critical Reading Strategy to Promote Students' Higher Order Thinking Skills</b>  <b>Article: ASCD: 5 Ways to Develop Critical Thinking Skills</b>  <b>Formative Assessment:</b>  <b>5.8: *Demonstration</b> through lesson plans and delivery of instruction that <b>integrates</b> multiple skills/strategies for <b>monitoring and self-correcting in reading</b>.</p>	<p><b>*Demonstration</b> through lesson plans and delivery of instruction that <b>integrates</b> multiple skills/strategies for <b>monitoring and self-correcting in reading</b>.  <b>*Teacher observations</b> and/or <b>videos</b> of instruction with whole and small groups <b>viewed, monitored and evaluated by district personnel, principal and/or reading coach</b>.  <b>*Reflection:</b> What worked well/didn't? Changes to lesson/instruction? Effective vs ineffective? Student level of engagement/assessment?  <b>*Identify</b> the practices included in the 3 case studies.</p>	
<p>5.7</p>	<p><b>Demonstrate</b> research-based instructional practices for developing both academic and domain specific <b>vocabulary</b>. ★</p>	<p><b>Curriculum Study Assignment:</b>  <b>5.7: Review:</b> Competencies 1-4 for instructional strategies and articles. (See <b>Portfolio</b>)  <b>Review:</b> Section V: Vocabulary Introduction; Chpts 11-13 for research-based instructional practices for academic and domain specific vocabulary.  <b>Read: IRIS Center: Helping Students</b></p>	<p><b>*Demonstration</b> through lesson plans and delivery of instruction that <b>integrates</b> multiple skills/strategies to develop both academic a domain specific <b>vocabulary</b>.  <b>*Teacher observations</b> and/or <b>videos</b> of instruction with whole and small groups <b>viewed, monitored and</b></p>	

<p><i>evaluated by district personnel, principal and/or reading coach.</i>  <b>*Reflection:</b> What worked well/didn't? Changes to lesson/instruction? Effective vs ineffective? Student level of engagement/assessment?  <b>Identify the vocabulary practices</b> included in the 3 case studies.</p>	<p><i>Become Independent Learners: Self-monitoring, self-instruction, goal-setting and self-reinforcement.</i>  <b>Formative Assessment:</b>  <b>5.7: *Demonstration</b> through lesson plans and <b>delivery</b> of instruction that <b>integrates</b> multiple skills/strategies to develop both academic a domain specific <b>vocabulary</b>.</p>	<p><b>5.2</b></p> <p><b>Demonstrate</b> research-based instructional practices for facilitating reading <b>comprehension</b>. ★</p>	<p><b>5.2: 5.9; 5.10; 5.11: Review:</b> Section VI: Comprehension  <b>Groups Read: Assigned Articles 5 Ways to Develop Critical Thinking Skills; Employing Critical Reading Strategy to Promote Students' Higher Order Thinking Skills; and Complex Text &amp; Disciplinary Text Strategies to Help Students' Go Deep When Reading Digitally</b>  <b>Review:</b> Letting Text Take Center Stage – Shanahan and Competencies 1-4 for instructional strategies. (See Portfolio)  <b>Formative Assessment:</b>  <b>5.2; 5.9; 5.10; 5.11:</b>  <b>*Each group</b> charts key points/findings and implications for instruction of their assigned readings. Share with each group.  <b>*Demonstration</b> through lesson plans and <b>delivery</b> of instruction that <b>integrates</b> multiple skills/strategies for <b>comprehension, promotes higher order thinking and read critically, while differentiating</b>.</p>	<p><b>*Demonstration</b> through lesson plans and <b>delivery</b> of instruction that <b>integrates</b> multiple skills/strategies for <b>comprehension, promotes higher order thinking and read critically, while differentiating</b>.  <b>*Teacher observations and/or videos</b> of instruction with whole and small groups <b>viewed, monitored and evaluated by district personnel, principal and/or reading coach.</b>  <b>*Reflection:</b> What worked well/didn't? Changes to lesson/instruction? Effective vs ineffective? Student level of engagement/assessment?  <b>Identify the comprehension, higher order thinking and read critically</b> practices included in the 3 case studies.</p>
<p><b>5.9</b></p> <p><b>Demonstrate</b> research-based comprehension instructional practices for developing students' higher order thinking to enhance comprehension. ★</p>	<p><b>5.10</b></p> <p><b>Demonstrate</b> research-based instructional practices for developing students' ability to read critically. ★</p>	<p><b>5.11</b></p> <p><b>Demonstrate</b> differentiation of instruction for all students utilizing increasingly complex print and digital text. ★</p>	<p><b>5.13: Review:</b> Competencies 1-4 for instructional strategies and print and digital articles. (See Portfolio)  <b>Article: Strategies to Help Students' Go Deep When Reading Digitally</b>  <b>Formative Assessment:</b>  <b>5.13: List</b> strategies that are identified that</p>	<p><b>Demonstration</b> through lesson plans that includes both <b>complex &amp; digital print text</b> that includes differentiated instruction.  <b>Include photos of their intensive environment</b> to showcase the print and digital text rich environment, including titles of texts.</p>

5.15	<p><b>Demonstrate</b> intentional, explicit, systematic <b>writing</b> instruction as it relates to the ability to read written language. ★</p>	<p>help students go deeper with digital text.  <b>*Demonstration through lesson plans</b> that includes both <b>complex &amp; digital print text</b> that includes differentiated instruction.  <b>Curriculum Study Assignment:</b>  <b>5.15: Review:</b> Competencies 1-4 for instructional strategies and articles. (See <b>Portfolio</b>)  <b>Read:</b> <i>Writing to Read: Evidence for How Writing Can Improve Reading and Explicit Writing Instruction</i>  <b>Formative Assessment:</b>  <b>5.15: *Demonstration</b> through lesson plans and <b>delivery of instruction that integrates multiple skills/strategies for writing instruction.</b></p>	<p><b>*Demonstration</b> through lesson plans and <b>delivery of instruction that integrates multiple skills/strategies for writing instruction.</b> <b>*Provide analysis of writing samples</b> from students as it relates to reading.  <b>*Teacher observations and/or videos of instruction with whole and small groups viewed, monitored and evaluated by district personnel, principal and/or reading coach.</b>  <b>*Reflection:</b> What worked well/didn't? Changes to lesson/instruction? Effective vs ineffective? Student level of engagement/assessment?  <b>*Identify the writing practices &amp; samples</b> in the 3 case studies.</p>
5.12*	<p><b>Demonstrate</b> skill in assessment and instruction with <b>English language learners</b> from diverse backgrounds and at varying English proficiency levels. ★</p>	<p><b>Curriculum Study Assignment:</b>  <b>5.12: Review:</b> Competencies 1-4 for instructional strategies and articles. (See <b>Portfolio</b>)  <b>Review:</b> <i>Academic Language &amp; ELLs: What teachers need to know</i>  <b>Review:</b> <i>Reading 101 for English Language Learners</i>  <b>Review:</b> <i>Chpt 2; Structure of Spanish</i>  <b>Formative Assessment:</b>  <b>5.12: *Demonstration</b> through lesson plans and <b>delivery of instruction that integrate multiple skills/strategies &amp; observations/video of instruction with ELLs to enhance reading and English acquisition.</b></p>	<p><b>*Develop lessons</b> with multiple research-based <b>ELL strategies and accommodations. Provide rationale for strategies chosen.</b> Include a <b>WIDA portrait of an ELL student.</b>  <b>*Demonstration</b> through lesson plans and <b>delivery of instruction that integrate multiple skills/strategies &amp; observations/video of instruction with ELLs to enhance reading and English acquisition.</b>  <b>*Teacher observations and/or videos of instruction with whole and small groups viewed, monitored and evaluated by district personnel, principal and/or reading coach.</b>  <b>*Identify the ELL practices, strategies and accommodations</b> included in the 3 case studies.  <b>*Reflection:</b> What worked well/didn't? Changes to lesson/instruction?</p>

					<p>Effective vs ineffective? Student level of engagement/assessment?</p> <p><i>*Participants provide their cumulative portfolios of all completed participant assignments, research, student artifacts, reflections, etc. for Competency 5, including Competencies 1, 2, 3 and 4.</i></p> <p><i>*Participants will demonstrate their job-embed understanding of reading as a process and application of the principles of reading: comprehension, oral language, phonological awareness, phonics, fluency and vocabulary.</i></p> <p><i>*Complete and present the 3 case studies for review and approval.</i></p> <p><i>*Participants complete and present all assigned reflections.</i></p>
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**Note: An official college transcript for coursework that meets Competency 5 requirements applies to competencies 1 through 5.**



## Appendix: Forms

PAEC READING ENDORSEMENT  
ADD-ON ENDORSEMENT APPLICATION FORM\*

NAME \_\_\_\_\_ TERMSID # \_\_\_\_\_

DISTRICT \_\_\_\_\_ SCHOOL \_\_\_\_\_

I am planning to add Reading Endorsement to my current Florida teaching certificate. I understand that I will need to complete the components covering the topics prescribed by the State Board of Education Rule 6A-4.0163. I also understand that I am responsible for verification of college credits, when appropriate. To receive credit for components, I understand that I must earn the full 60 points available for each component.

Please give a brief statement of your reason(s) in pursuing this endorsement.

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Selected Reading Endorsement Track (circle one): 1 2 3 4

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

\_\_\_\_\_  
Position

*\*Please note:*  
Applicants must return this completed form to the appropriate district office contact.



PANHANDLE AREA EDUCATIONAL CONSORTIUM  
READING ENDORSEMENT  
TRANSFER OF COLLEGE CREDIT (Form C)

1. Name \_\_\_\_\_

2. District \_\_\_\_\_ 3. School \_\_\_\_\_

4. TERMS ID. \_\_\_\_\_ 5. DOE No. \_\_\_\_\_

The attached college transcripts are submitted as part of the PAEC Reading Endorsement program. These courses meet the requirements of the following component(s) in the approved \_\_\_\_\_ county program for Reading Endorsement.

6. Program area

	PAEC/District Component # and Title	College Course # and Title
1)	_____	_____
2)	_____	_____
3)	_____	_____

**FOR DISTRICT OFFICE OF CERTIFICATION USE ONLY**

No. Points Approved \_\_\_\_\_ No. Points Not Approved \_\_\_\_\_

COMMENTS:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date \_\_\_\_\_

District Official \_\_\_\_\_

### Competency 5 – Checklist of Competencies

At the conclusion of the practicum experience leading to the reading endorsement, the practicum supervisor will complete the following checklist in consultation with the teacher.

Specific Indicator		Decision	Method of Assessment
5.1	Use assessment and data analysis to monitor student progress and guide instruction over time to ensure an increase in student learning.		
5.2	Demonstrate research-based instructional practices for facilitating reading comprehension.		
5.3	Demonstrate research-based instructional practices for developing oral/aural language development.		
5.4	Demonstrate research-based instructional practices for developing students' phonological awareness.		
5.5	Demonstrate research-based instructional practices for developing phonics skills and word recognition.		
5.6	Demonstrate research-based instructional practices for developing reading fluency and reading endurance.		
5.7	Demonstrate research-based instructional practices for developing both academic and domain specific vocabulary.		
5.8	Demonstrate research-based instructional practices to facilitate students' monitoring and self-correcting in reading.		
5.9	Demonstrate research-based comprehension instructional practices for developing students' higher order thinking to enhance comprehension.		
5.10	Demonstrate research-based instructional practices for developing students' ability to read critically.		
5.11	Demonstrate differentiation of instruction for all students utilizing		
5.12	Demonstrate skill in assessment and instruction with English Language Learners from diverse backgrounds and at varying English proficiency levels.		
5.13	Create an information intensive environment that includes print and digital text.		
5.14	Use a variety of instructional practices to motivate and engage students in reading.		
5.15	Demonstrate intentional, explicit, systematic writing instruction as it relates to the ability to read written language.		

Use the following codes for completion of this form:

Decision	Method of Assessment		
D = Demonstrated PD = Partially Demonstrated ND = Not Demonstrated	O = Observation W = Written Reflection	V = Video CS = Case Study	LP= Lesson Plan

The practicum is complete when the teacher has demonstrated success on at least 80% (12) of the indicators.

\_\_\_\_\_  
Signature of Teacher

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Mentor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Practicum Supervisor

\_\_\_\_\_  
Date

Inservice Program  
For Add-On Endorsement

In the Area of

**READING**

Professional Development Center  
Panhandle Area Educational Consortium  
753 West Boulevard  
Chipley, Florida 32428  
(850) 638-6131

Recommended to the \_\_\_\_\_ District School Board on \_\_\_\_\_, 2020

\_\_\_\_\_  
Superintendent

Approved by the \_\_\_\_\_ District School Board on \_\_\_\_\_, 20\_\_

\_\_\_\_\_  
Chairman of the Board

**SUMMARY SHEET**

**RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA**

**AGENDA ITEM NO.** 8g

**DATE OF SCHOOL BOARD MEETING:** March 24, 2020

**TITLE OF AGENDA ITEM:** Scott v. Gadsden County School Board

**DIVISION:**

**PURPOSE AND SUMMARY OF ITEM:** The purpose of this item is to get final approval of a settlement in the above-referenced matter.

Mr. Scott alleges that he was injured in an automobile accident with a school bus on October 23, 2015. Mr. Scott suffered injuries to his arm, neck, and back in the accident, and had spinal surgery as a result.

The parties reached a negotiated settlement on the eve of trial for \$90,000. Mr. Scott will be responsible for his attorney's fees and litigation costs, as well as satisfaction of any outstanding liens. The District has liability insurance coverage for this matter and the carrier is aware of and has authorized the recommended settlement amount. Therefore, we, along with the District's insurance carrier, recommend approval of the settlement.

**The Superintendent recommends approval of this item.**

<b>FUND SOURCE:</b>	General
<b>AMOUNT:</b>	\$90,000.00
<b>PREPARED BY:</b>	DSM
<b>POSITION:</b>	School Board Attorney

SUMMARY SHEET

RECOMMENDATION TO SUPERINTENDENT FOR SCHOOL BOARD AGENDA

**AGENDA ITEM NO.** 10a

**Date of School Board Meeting:** March 24, 2020

**TITLE OF AGENDA ITEM:** Stewart Street Elementary School

**DIVISION:** Elementary Education

\_\_\_\_\_ This is a CONTINUATION of a current project, grant, etc.

**PURPOSE AND SUMMARY OF ITEM:**

(Type and Double Space)

According to School Board Policy 2340 (Field and Other District-Sponsored Trips), all out-of-state field trips must be approved by the School Board. Stewart Street Elementary School is requesting approval for an out-of-state field trip to Valdosta, GA. Please see attached documentation.

**FUND SOURCE:** N/A

**AMOUNT:** N/A

**PREPARED BY:** Tammy McGriff Farlin



**POSITION:** Area Director of Elementary Education

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INSTRUCTIONS TO BE COMPLETED BY PREPARER

\_\_\_\_\_ Number of ORIGINAL SIGNATURES NEEDED by preparer.

SUPERINTENDENT'S SIGNATURE: page(s) numbered \_\_\_\_\_

CHAIRMAN'S SIGNATURE: page(s) numbered \_\_\_\_\_



**FORM MUST BE RECEIVED IN DISTRICT OFFICE 2 WEEKS PRIOR TO TRIP**

### FIELD TRIP REQUEST

<b>SCHOOL:</b> Stewart Street Elem.	<b>CONTACT FOR FIELD TRIP:</b> Ms. Gordon
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<b>DATE OF TRIP:</b> May 14, 2020	<b>WHO IS ATTENDING: (grade/organization)</b> 4th grade
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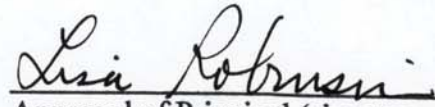
<b>LOCATION:</b> Wild Adventures 3766 Old Chattville Road Valdosta, GA 31601	<b>TRAVELING BY:</b> <input type="checkbox"/> School bus <input checked="" type="checkbox"/> Charter bus
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**PURPOSE:** To study wild animals in their natural habitats. Also, to discover animals that are indigenous to Florida's waterways.

- SCHOOL BUS – Required items for approval:**
1. Principal's signature
  2. Complete list of participants and chaperones
  3. Complete final itinerary
  4. Documentation showing correlation of the Florida Standards or benchmarks to the field trip request

- CHARTER BUS – Required items for approval:**
1. Principal's signature
  2. Complete list of participants and chaperones
  3. Complete final itinerary
  4. Copy of charter bus contract with signatures
  5. Proof of Insurance showing either district or school as insured

  
Signature of Person Requesting Trip

  
Approval of Principal (signature required)

<input type="checkbox"/> APPROVED	<input type="checkbox"/> DENIED
_____ Superintendent/Designee	_____ Date

Please forward completed form via district mail or fax to:  
**Mrs. Cheryl Ellison**  
**Program Assistant for Curriculum & Instruction**  
**Fax: (850) 627-3530      Email: ellisonc@gcpsmail.com**



# Stewart Street Elementary School

"Where Children and Learning Come First"

749 South Stewart Street ♦ Quincy, Florida 32351  
(850) 627-3145 ♦ Fax: (850) 875-8750

## Field Trip Request Form

Trip Type:

- Educational
- Extracurricular
- Other
- Recreation/Fun
- Sports

In/Out of County:

- In County
- Out county
- Out of State/Country
- Overnight

Duration:

- Day
- Extended

## Sponsor/Group Information

Requested by: Ms. Gordon

Group Name: 4th Grade Mustangs

Group Contact: 850-627-3145 ext. 4826

Contact Mobile: 850-345-0081

Trip Purpose:

To discover animals that are indegenous to Florida's waterways and how their actions can influence Florida's ecosystem.

Estimated # of Students 60

Estimated # of Chaperones 4

Total Participants 64

# of Bag Lunches Required 60

## Transportation Required

Is Transportation Required?  Yes  No

Type of Transportation Required  Car  Full Bus  Mini Bus

Other/Van  Charter Bus

Estimated # of Vehicles Required \_\_\_\_\_

Volunteer Driver Required  Yes  No

Specify Any Special Needs Required:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Lisa Robinson, Principal**

**Curlie Harris, Assistant Principal**  
**Christopher Germany, Assistant Principal**

Itinerary

Depart Date: May 14, 2020

Depart Time: 9:00 Am

Return Date: May 14, 2020

Return Time: 7:00 pm

Trip Destination: Wild Adventures

Destination City: Valdosta

Destination State: Georgia

Destination Contact Name: \_\_\_\_\_

Destination Phone #: 229-219-7080

Departure Location: Wild Adventures

Return Location: Stewart Street Elementary

Fund: Student funded

Additional Comments:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Signature: Shakilla Jordan

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

# The School Board of Gadsden County Food Service Department

## Field Trip Request Form

Date of Request: Jan. 28, 2020

Teacher(s): Ms. Gordon Grade(s): 4th

Coolers **must** be provided by the person that make the request

To the Food Service Manager:

We are planning a field trip. We request that you provide breakfast and/or lunch as follows:

Date of field trip: May 14, 2020

Number of breakfasts: 0

Number of lunches: 60

Time for pick-up: 8:45am

Comments:

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Teacher's Signature Ms. Gordon

**\*This form needs to be turned in at least 2 weeks in advance\***



Ms. Gordon's Class Roster

2019-2020

1. C
2. K
3. J
4. T
5. A
6. L
7. F
8. F
9. C
10. .
11. K
12. T
13. M
14. T
15. A
16. T
17. L
18. F

**Mrs. Bell-Key's Class Roster**

**2019-2020**

K

J:

Z

S

T

A

N

A

C

K

Z

R

S

T

J

N

J:

C

R

S

V

Ms. York  
2019-2020 Class Roster

1. M

2. N

3. C

4. L

5. T

6. J

7. T

8. T

9. J

10. J

11. C

12. S

13. A

14. D

15. S

16. Is

Stewart Street Elementary Schl  
Class Roster Report

Teacher: ISRAEL, SARAH B.  
Course: 5010045 / LANG ARTS GRD 4

School Year: 2019-2020

Sec: 4004

Last, First MI

D  
E  
H  
H  
M  
M  
M  
M  
P  
S  
S  
S  
T  
V  
W  
W  
W



**4<sup>th</sup> Grade End of the Year Field Trip**

**Where: Wild Adventures Theme Park**

**Valdosta, GA**

**When: May 14, 2020**

**Chaperones:**

Ms. Gordon

Ms. York

Mrs. Bell-Key

Mrs. Israel

Mr. Byrant

Mrs. Dowdell

www.limomike.com

Customer Name: Stewart St. Elen  
 Credit Card: \_\_\_\_\_  
 Expiration Date: \_\_\_\_\_ CVVC: \_\_\_\_\_  
 Billing Address: Cordon Street, Bilk & APS mail, can spot

Vehicle: Bus  
 Occasion: 50 # of People  
 I.V Time: \_\_\_\_\_ P/A: 9:00 AM  
 D/D Time: 7 pm Return: 8:30 AM

	Scheduled	Overtime	Total
Rate per Hour			
Number of Hours			
Fuel Surcharge		<u>Includes</u>	
Driver Fee		<u>25</u>	
Total	<u>1340.00</u>		

**Rental Agreement**

It's our pleasure to be of service to you. Our staff keeps our vehicles in excellent condition and it is of the utmost importance that all clients act in a responsible manner to preserve the condition of the vehicles. Smoking and eating are prohibited in all of our vehicles. The client is responsible for their guests in ALL REGARDS to rules and regulations. Any damage to the rented vehicle owned by this company will be charged in full to the customer that contracted with Mike's Limousine Service, Inc. whether by accident, neglect, or intent. Our company cannot be held responsible for delays or inconveniences due to traffic, unknown or unforeseen mechanical failures, situations deemed "Acts of God"

50% Cancellation Fee

**Damage Deposit**

A damage deposit in the amount of \$200.00 per vehicle will be secured with the credit card provided to secure your rental. If damages exceed deposit, additional deposit will be required or rental will be terminated.

**Fee Schedule:**

- Smoking: (including lighting a cigarette) \$100.00
- VOMIT: (each occurrence) \$200.00
- Eating in Limo: \$100.00
- Spills: \$75.00
- Excessively Dirty Interior (Limo) \$50.00
- Excessively Dirty Interior (Bus) \$150.00
- Broken or Missing glassware \$10.00 Each

50% Deposit by check to Reserve  
Balance due 5/7/20

**Termination of Service**

- > If the client becomes incapacitated, the run is terminated unless another individual chooses to secure the deposit with cash or a credit card. The client can appoint one person to be responsible on their behalf at the beginning of the run.
- > If the client or their guests become unruly or violate safe operation procedures, the rental will terminate immediately and NO REFUND given.
- > While transporting ANY minors if ANY alcohol is found in the vehicle or a minor is found visibly impaired, the rental will terminate immediately and NO REFUND given.

The original client is responsible for overtime fees and authorizes those charges to be charged to their credit card. (overtime is rounded to the next 1/2 hour.) In the event that your check is returned, we have your permission to charge the whole amount plus \$25.00 service fee to the credit card listed on this contract. We are not responsible for items left, lost, or stolen while riding in our vehicles. We have a lost and found box at Mike's Limousine Service, Inc. located @ 3109 W. Tennessee St. Tallahassee, FL 32304

I agree to these terms \_\_\_\_\_ Client

Mike's Limousine Service Representative \_\_\_\_\_ 32357

Mileage out: \_\_\_\_\_  
 Mileage in: \_\_\_\_\_  
 PU Time: \_\_\_\_\_  
 Drop Time: \_\_\_\_\_  
 Rock Glass: \_\_\_\_\_  
 Wine Glass: \_\_\_\_\_

PU Address: Stewart St Elen. 748 S Stewart St Quinn  
 DO Address: WILD Adventures 3766 Old Chynoweth Rd 3461  
 Contact Info: 345-0081  
 Cancellation Fee: 50%  
 Pymnt Method: Check on PU Cash on PU Adv Pymnt Bill to CC  
 Booked By: Page 250 of 251 Booked on: 2/8/20 Driver: \_\_\_\_\_



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
1/8/2020

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

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

<b>PRODUCER</b> TIB Transportation Insurance Brokers 425 West Broadway, Suite 300 Glendale CA 91204		<b>CONTACT NAME:</b> Gabby Juncal <b>PHONE (A/C, No, Ext):</b> 818-246-2800 <b>E-MAIL ADDRESS:</b> gjuncal@tibinsurance.com <b>FAX (A/C, No):</b> 818-246-4690	
<b>INSURED</b> Mike's Limousine Service, Inc 3109 West Tennessee St Tallahassee FL 32304		<b>INSURER(S) AFFORDING COVERAGE</b> INSURER A : RLI Insurance INSURER B : INSURER C : INSURER D : INSURER E : INSURER F :	
		<b>NAIC #</b> 13056	

**COVERAGES**      **CERTIFICATE NUMBER:** 655163985      **REVISION NUMBER:**

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER			LGB0013887	11/26/2019	11/26/2020	EACH OCCURRENCE \$ 5,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 5,000,000 GENERAL AGGREGATE \$ 5,000,000 PRODUCTS - COMPIOP AGG \$ 5,000,000 \$
A	<input type="checkbox"/> <b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS			LFB0016237	11/26/2019	11/26/2020	COMBINED SINGLE LIMIT (Ea accident) \$ 5,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<input type="checkbox"/> <b>UMBRELLA LIAB</b> <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$						<input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE EACH OCCURRENCE \$ AGGREGATE \$ \$
	<input type="checkbox"/> <b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> <input type="checkbox"/> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> N/A <input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$

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

<b>CERTIFICATE HOLDER</b>  Proof Of Insurance Only XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXX XX XXXXXXXXXXXX	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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