Agenda

Finance Committee Heins Education Building Assembly Room, Basement 106 Gordon Street, Sanford, NC 27330 Thursday, January 25, 2024 5pm

- 1. Call to Order-Alan Rummel
- 2. Approval of 1/25/2024 Agenda-Alan Rummel
- 3. Approval of 12/5/2023 Minutes-Alan Rummel
- 4. Broadway Presbyterian Church Parking Lot Update-Dr. Chris Dossenbach
- Purchasing Technology Equipment-second round-Rebecca Measamer
- 6. E-Rate Update-Rebecca Measamer
- 7. EMS-Linq-HR Module-Stacie Eggers
- 8. Banking Services RFP Bids-Kelly Jones
- 9. 2024-2025 Budget Update-Kelly Jones
- 10. Evergreen Solutions Staffing Study-Dr. Chris Dossenbach/Stacie Eggers
- 11. Review Board Attorney Invoice-Services through 11/30/2023 and 12/31/2023-FYI-Kelly Jones
- 12. Review Monthly Financial Report-FYI-Kelly Jones
- 13. Review Monthly Board Expense Summary -FYI-Kelly Jones
- 14. Adjourn-Alan Rummel

The next Finance Committee meeting is scheduled for Thursday, February 22, 2024, 5pm, Assembly Room, Basement, Heins Education Building.

FINANCE COMMITTEE MEETING



Finance Committee Meeting - December 5, 2023

Present: Alan Rummel, Patrick Kelly, Eric Davidson, Dr. Chris Dossenbach, Kelly Jones, Salvatore Cosimo, Stacie Eggers, Susan Britt, Rebecca Measamer, Rebel Hunter, Lisa Duffey and Jordan Allred.

Alan Rummel called the meeting to order. Patrick Kelly made a motion to approve the agenda, Alan Rummel seconded the motion, the motion carried unanimously.

Patrick Kelly made a motion to approve the minutes from the October 24, 2023 meeting, Alan Rummel seconded the motion, the motion carried unanimously.

2024-2025 Microsoft Licensing

Technology proposed adopting a Microsoft Enrollment for Education Solutions agreement. This agreement will provide Microsoft 365 A3 licensing for all end users. Some pros that were presented by Rebecca and Rebel were better insight to inventory management, staff & student controls, next gen antivirus. Patrick Kelly made a motion to approve with Alan Rummel seconding the motion this will be placed under Consent at the Board of Education meeting on December 12, 2023.

EC Contracts Over \$50,000

Kelly Jones shared two contracts, one will be utilized to replace a previous employee the other will provide full time services to five schools. Patrick Kelly made a motion to approve with Alan Rummel seconding the motion this will be placed under Consent at the Board of Education meeting on December 12, 2023.

Banking Service RFP

Kelly Jones shared the banking RFP that will be sent out on December 13, 2023, proposals must be received by January 19, 2024 if approved by the BOE at the December 12, 2023 meeting. The new banking services would begin July 1, 2024. Patrick Kelly made a motion to approve with Alan Rummel seconding the motion this will be placed under Consent at the Board of Education meeting on December 12, 2023.

2023-2024 Budget Resolution

Kelly Jones shared the 2023-2024 Budget Resolution. Patrick Kelly asked about what percentage of the district's budget is for salaries and benefits. Mrs. Jones confirmed that 85% of budget is used for salary related expenses. Patrick Kelly made a motion to approve with Alan Rummel seconding the motion this will be placed under the Consent at the Board of Education meeting on December 12, 2023.

Needs Based Public School Capital Fund Grant Application

Stacie Eggers went over the requests that were being submitted for the grant – Auditorium for Southern Lee High School, New Gyms with additional classrooms for both East Lee Middle and West Lee Middle. Patrick Kelly made a motion to approve with Alan Rummel seconding the motion this will be placed under New Business at the Board of Education meeting on December 12, 2023.

Referral Bonus

Stacie Eggers shared the referral bonus update and explained what had been paid out year to date and asking permission to continue this program with the remaining funds set aside earlier this year. Dr. Dossenbach explained why only hard to fill position would be eligible based on the data needed to be present to justify the use of ESSER funding. Patrick Kelly made a motion to approve with Alan Rummel seconding the motion this will be placed under New Business at the Board of Education meeting on December 12, 2023.

Review Board Attorney Invoice

Kelly. Jones provided the invoice from Tharrington Smith, L.L.P for services rendered through October 31, 2023 in the amount of \$9,250.55 for committee review. The invoice will be provided to the Board at the December 12, 2023 meeting as FYI.

Review Financial Report-FYI-Kelly Jones

Kelly Jones shared the Financial Report with the Finance Committee for review. The financial report will be provided to the Board at the December 12, 2023 meeting as FYI.

Board Expense Summary-

Kelly Jones shared the Board Expense Summary with the Finance Committee for review. The expense summary will be provided to the Board at the December 12, 2023 meeting as FYI.

With no further business, Patrick Kelly made a motion to adjourn, Alan Rummel seconded the motion, the motion carried unanimously. The next Finance Committee meeting is scheduled for Thursday, January 25, 2023, 5:00pm, assembly room.

Respectfully submitted,

Kelly G. Jones Chief Finance Officer



Technology Equipment Purchase 2023-2024 Round 2

The Technology Department is conducting 3 rounds of combined equipment purchases during the 2023-2024 school year. We are bidding all sites together to obtain the best possible service and pricing. Title 1 funds will be used.

	The second secon
Vendor	Total
Netcom	\$68,399.54
Best Buy	\$13,487.50
NextWave	\$207,808.84
IPEVO	\$561.53
Insite	57,634.55
Howard	\$794.48
Output Take	

Grand Total \$298,686.44

Headphones	with Mic								35	6						55
USB Headphones	w/o Mic					900	000									200
Black &	value rimier					•	2									က
PEVO - Document	Camera					ų										ည
65" TV's with												10	:	•	-	20
Clear Touch Clear Touch Wireless 65" TV's with Document White Panel Mobile Keyboard Mou	se Set					13	-			10	10					32
Staff Touch Clear Touch Clear Touch Wireless Screen Interactive Panel Mobile Keyboard Mo	Stands				2			_		5						œ
Clear Touch Interactive	Panels	m	17	10	3	2		-1		5	101					52
Staff Touch Screen	Chromebooks	28					4	0					7			35
HP Probook Windows	Laptops	'n					y	5								=
Desktop Computers										2						2
Desktop Monitors				C1		3	v	1		2						12
Student Desktop Desktop Chromebooks Monitors Computers		48				25		00,	100				+			177
Site		DK	BTB	ING	TWT	田	BWY	911	WD	ELM	SLM	SLH	MEP/CO	HR/C0	Total	Quantities



LEE COUNTY SCHOOLS BID EVALUATION FORM

PROJECT INFORMATION:

177- HP Chronebook 11 G9EE Part # 3V2Y2UT and 177- Google Management licenses

VENDOR NUMBER	VENDOR NAME	PRODUCT BRAND OFFERED
V1	SCW	Part # 3V2Y2UT W/ licenses
V2	SHI	Part # 3V2/2UT WI licenses
V3	Netcom	Part # 3VZYZUT W/ VICENSES
V4		2011/2013
V5		

EVALUATION CRITERIA (FOR AUGMENTING CURRENT ENVIRONMENT):

CRITERA EXPLANATIONS:

- HARDWARE COMPATIBILITY: Quoted equipment works seamlessly with existing equipment
- SUPPORT COMPATIBILITY: Quoted equipment can be supported in a manner equal to the existing equipment
- PRIOR EXPERIENCE: Previous experience with purchasing goods or services from vendor
- COST OF ELIGIBLE GOODS AND SERVICES: Price of eligible services or equipment
- COST OF INELIGIBLE GOODS AND SERVICES: Price of ineligible services or equipment

CRITERIA	V1	V2	V3				
PRICE (35 points)	25	30	35				
HARDWARE COMPATIBILITY (25 points)	25	25	25		N CARLOS CONTANTO	3-7-222360	**********
PRIOR EXPERIENCE (15 points)	15	15	15				
ADHERENCE TO RFP (15 points)	15	15	15	Showe Serve			Segundo se se se
SUPPORT COMPATIBILITY (10 points)	10	10	16				
TOTAL (100 points)	90	95	100	* P * P * D * N	Section Control of Control	SEAL SEAL SEAL SEAL SEAL SEAL SEAL SEAL	A Cartingary P.

Evaluator:	Sampa Hoyd	anJ	Rebecca Measamer
		,	
Date:	1/12/24		



Chrome book

ee County Schools bulk order Quote due by 1/12/24 at 5pm.

messages

enn Lloyd <jlloyd@lee.k12.nc.us>

Thu, Jan 11, 2024 at 8:51 Al

o: Jenn Lloyd <jlloyd@lee.k12.nc.us>

cc: Todd Jordan <tjordan@netcombsi.com>, Junius Brodnax <junius.brodnax@scw.com>, Ryan Doelger <Ryan_Doelger@shi.com>, :ebecca Measamer <rmeasamer@lee.k12.nc.us>

This order will be approved by the BOE and the order placed for 4 sites. Pricing will need to be good through 2/20/24.

Can you send me a quote for 177 - HP Chromebook 11 G9EE Part #3V2Y2UT and 177 Google Management licenses

Quotes due by 1/12/24 at 5pm

Jenn Lloyd Lee County Schools, Technology Department 919-774-6226

:yan Doelger <Ryan_Doelger@shi.com>
o: Jenn Lloyd <jlloyd@lee.k12.nc.us>

Thu, Jan 11, 2024 at 11:37 Al

Hey Jenn,

Thanks for sending this over!

HP is currently running a promo on these units until the end of January, and will have some new pricing starting Feb 1st. Is there anyway we would be able to refresh the pricing come Feb 1, or do you absolutely need a price that is good until Feb 20th?



Ryan Doelger

PubSec Inside Account Executive

Office: +17325848250

Review SHI's privacy policy to manage communications.

From: Jenn Lloyd <jlloyd@lee.k12.nc.us> Sent: Thursday, January 11, 2024 8:52 AM To: Jenn Lloyd <jlloyd@lee.k12.nc.us>

Subject: Lee County Schools bulk order Quote due by 1/12/24 at 5pm

External Sender: Use caution with links/attachments.					
[Quoted text hidden]					
E-mail correspondence to and from this sender may be subject to the North Carolina Public Records Lav third parties.	and may be disclosed to				
enn Lloyd <jlloyd@lee.k12.nc.us> o: Ryan Doelger <ryan_doelger@shi.com></ryan_doelger@shi.com></jlloyd@lee.k12.nc.us>	Thu, Jan 11, 2024 at 12:26 P				
Yes, the winning bid must have pricing good through 2/20. Board will not approve the order until 2/13/24. [Quoted text hidden]					
yan Doelger <ryan_doelger@shi.com> : Jenn Lloyd <jlloyd@lee.k12.nc.us></jlloyd@lee.k12.nc.us></ryan_doelger@shi.com>	Thu, Jan 11, 2024 at 12:28 Pl				
Thanks for the heads up.					
[Quoted text hidden]					

Fri, Jan 12, 2024 at 4:07 PI

Hey Jenn,

Here is your quote, let me know if you have any questions!



Ryan Doelger

:yan Doelger <Ryan_Doelger@shi.com>

o: Jenn Lloyd <jlloyd@lee.k12.nc.us>

Review SHI's privacy policy to manage communications.

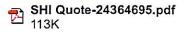
From: Jenn Lloyd <jlloyd@lee.k12.nc.us> Sent: Thursday, January 11, 2024 8:52 AM To: Jenn Lloyd <jlloyd@lee.k12.nc.us>

Subject: Lee County Schools bulk order Quote due by 1/12/24 at 5pm

External Sender: Use caution with links/attachments.

This order will be approved by the BOE and the order placed for 4 sites. Pricing will need to be good through 2/20/24. [Quoted text hidden]

[Quoted text hidden]





Southern Computer Warehouse

1395 S. Marietta Parkway **Building 300** Marietta, Georgia 30067 **United States** http://www.scw.com (P) 877-GOTOSCW (F) 770.579.8937

enne (enn)

Jan 11, 2024 08:53 AM EST

Modified Date

Jan 12, 2024 03:31 PM EST

Quote #

1808908 - rev 1 of 1

Description

HP Chromebook 3V2Y2UT

SalesRep

Brodnax, Junius (P) 877-GOTOSCW

Customer Contact

Lloyd, Jennifer (P) 919-774-6226 jlloyd@lee.k12.nc.us

Customer

Lee County NC BOE (LC20742) Lloyd, Jennifer 360 Center Church Road Sanford, NC 27330 United States (P) 919-718-0170 (F) 919-774-1325

Bill To

Lee County NC BOE Accounts, Payable 360 Center Church Road Sanford, NC 27330 United States (P) 919-718-0170 (F) 919-774-1325

Ship To

Lee County NC BOE Receiving, Dept 360 Center Church Road Sanford, NC 27330 **United States** (P) 919-718-0170

(F) 919-774-1325

Terms: Undefined Ship Via: GROUND

Carrier Account #:

Customer PO:

Special Instructions:

HP Inc. - HP Chromebook 11 G9 Education Edition

3V2Y2UT#ABA

Intel Celeron - N4500 / up to 2.8 GHz - Chrome OS - UHD Graphics - 4 GB RAM - 32 GB eMMC - 11.6" 1366 x 768 (HD) - 802.11a/b/g/n/ac/ax - jet black - kbd: US

Contract

HP OMNIA / NIPA - HP OMNIA / NIPA R210403

Google - Google Chrome OS Management Console License - academic

CROS-SW-DIS- Yes 177 \$29.89 \$5,290.53

Yes 177 \$231.67 \$41,005.59

EDU-NEW

Contract

Open Market - Open Market

Subtotal:

\$46,296.12

Tax (7.0000%):

\$3,240.73

Shipping: Total:

\$0.00 \$49,536,85

Notes

Thank you for the opportunity to build this quote for you!

Quote valid for 30 days unless formal bid provides different term. Promotional pricing is valid only during term of promotion and while supplies last. All returns must be authorized and clearly marked with a valid RMA number. RMA's are subject to restock fees when applicable.

Disclaimer

These prices may not include applicable taxes, insurance, shipping, delivery, setup fees, or any cables or cabling services or material unless specifically listed above. Please note that expedited shipping charges are estimated, and could decrease or increase when invoiced. All prices are subject to change without notice. Supply subject to





Pricing Proposal

Quotation #: 24364695 Created On: 1/11/2024 Valid Until: 2/21/2024

NC-County of Lee Schools

Inside Account Executive

Jenn Lloyd

106 Gordon St. ATTN: Rebel Hunter Sanford, NC 27330 United States

Phone: (919) 774-6226

Fax:

Email: jlloyd@lee.k12.nc.us

Ryan Doelger

290 Davidson Ave Somerset, NJ 08873 Phone: 732-584-8250

Fax:

Email: ryan_doelger@shi.com

All Prices are in US Dollar (USD)

Produ	uct	Qty	Your Price	Total
Chrom 802.11 HP, I Conti	aromebook 11 G9 Education Edition - Intel Celeron - N4500 / up to 2.8 GHz - ne OS - UHD Graphics - 4 GB RAM - 32 GB eMMC - 11.6" 1366 x 768 (HD) - la/b/g/n/ac/ax - jet black - kbd: US Inc Part#: 3V2Y2UT#ABA ract Name: Open Market ract #: Open Market	177	\$221.23	\$39,157.71
Goog Contr	Chrome OS Management Console - License - academic Google - Part#: CROSSWDISEDUNEW Contract Name: Open Market Contract #: Open Market	177	\$32.32	\$5,720.64
		(Subtotal	\$44,878.35
			Shipping	\$0.00
			*Tax	\$3,141.48
			Total	\$48,019.83

*Tax is estimated. Invoice will include the full and final tax due.

Additional Comments

Please Note: HP, Inc. has a zero returns policy on custom build PCs. Ink and toner are also considered non-returnable. For these products, orders are non-cancellable and non-returnable from point of order.

Please note: Google has a zero returns policy.

Hardware items on this quote may be updated to reflect changes due to industry wide constraints and fluctuations.

Please note, if Emergency Connectivity Funds (ECF) will be used to pay for all or part of this quote, please let us know as we will need to ensure compliance with the funding program.

Thank you for choosing SHI International Corp! The pricing offered on this quote proposal is valid through the expiration date set

SHI International Corp. is 100% Minority Owned, Woman Owned Business. TAX ID# 22-3009648; DUNS# 61-1429481; CCR# 61-243957G; CAGE 1HTF0

The products offered under this proposal are Open Market and resold in accordance with the terms and conditions at <u>SHI Online Customer Resale Terms and Conditions</u>.



2900 Village Drive Fayetteville, NC 28304 910-486-5040 Phone 910-486-4937 Fax 888-638-8880 Toll Free

Quotation				
Quote#	Date			
61889	01/12/2024			
Sales	Rep			
Todd .	lordan			

910-486-5040

For:	Customer # LS1032	Phones:	The Manager of the Control of the Co		
Jen Lloyd Lee County Schools 106 Gordon Street Sanford NC 27330		PO #	Terms	Ship Date	Ship Via
Samora NC 27330			NET 30		GROUND

	Part	Description	Qty	Price	Extended
1)	3V2Y2UT	HP Chromebook 11 G9 EE, Intel Celeron Processor, 4 GB Ram,	177	206.72	36,589.4
		32GB Flash Memory, wireless, webcam, Chrome OS, 1 Year			
		warranty			
2)	CROS-SW-DIS-EDU	Google Management Console License	177	31.00	5,487.00
3)		Netcom willalso offer On-Site pickup and delivery warranty	1		
		repair at no charge to LCS			

Subtotal	42,076.44
Tax 7.000%	2,945.35
Total	\$45,021.79



LEE COUNTY SCHOOLS BID EVALUATION FORM

PROJECT INFORMATION:

12- Asus computer monitors. VAZ4EHE

IDENTIFIED VENDORS:

VENDOR NUMBER	VENDOR NAME	PRODUCT BRAND OFFERED
V1	SHI	ASUS VA24EHE Monitor
V2	Best Buy	ASUS VAZYETTE Monitor
V3	Bluum	ASUS VA 24EHE Monitor
V4		
V5		

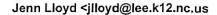
EVALUATION CRITERIA (FOR AUGMENTING CURRENT ENVIRONMENT):

CRITERA EXPLANATIONS:

- HARDWARE COMPATIBILITY: Quoted equipment works seamlessly with existing equipment
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- COST OF ELIGIBLE GOODS AND SERVICES: Price of eligible services or equipment
- COST OF INELIGIBLE GOODS AND SERVICES: Price of ineligible services or equipment

CRITERIA	V1	V2	V3			
PRICE (35 points)	25	35	30		***********	
HARDWARE COMPATIBILITY (25 points)	25	25	25			
PRIOR EXPERIENCE (15 points)	15	15	15			E T
ADHERENCE TO RFP (15 points)	15	15	15		State Superior Section 1	
SUPPORT COMPATIBILITY (10 points)	10	10	10			
TOTAL (100 points)	90	100	95		60 S - 10 M S 1400	transportation,

Evaluator:	Jennifir Lloyd	and Rebecca Measamer
Date:	1/12/24	







.ee County Schools bulk order quote due 1/11/24 at 5pm

messages

enn Lloyd <jlloyd@lee.k12.nc.us>

Wed, Jan 10, 2024 at 12:52 PI

o: Jenn Lloyd <jlloyd@lee.k12.nc.us>

cc: "Radil, Andy" <andy.radil@bestbuy.com>, Darryl Dutcher <darryl.dutcher@bluum.com>, Ryan Doelger <Ryan_Doelger@shi.com>, :ebecca Measamer <rmeasamer@lee.k12.nc.us>

This order will be approved by the BOE and the order placed for 4 sites. Pricing will need to be good through 2/20/24.

Can you please send me a quote for 12- Asus VA24EHE monitors

Quote due by 1/11/24 at 5pm

Jenn Lloyd Lee County Schools, Technology Department 919-774-6226

:adil, Andy <Andy.Radil@bestbuy.com>
b: Jenn Lloyd <jlloyd@lee.k12.nc.us>

Wed, Jan 10, 2024 at 1:56 PI

Here you go!

Thank you!

Ref: # 244216793

Thank You!

Andy J. Radil

Sr. Account Manager, Best Buy Education

Office: 612-292-0468

Fax: 952-430-0276

Andy.Radil@Bestbuy.com

Learn how we can help at www.BestBuy.com/Education

For Post-Sales Support Email at EducationSupport@BestBuy.com

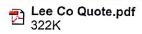
From: Jenn Lloyd <jlloyd@lee.k12.nc.us> Sent: Wednesday, January 10, 2024 11:53 AM

To: Jenn Lloyd <jlloyd@lee.k12.nc.us>

Subject: [CAUTION! EXTERNAL] Lee County Schools bulk order quote due 1/11/24 at 5pm

The state of the s
low down, read carefully and look for signs that it may be a phish. If you think it's malicious, click the report phish button or forward this email to phishing@bestbuy.com.
uoted text hidden]

E-mail correspondence to and from this sender may be subject to the North Carolina Public Records Law and may be disclosed to third parties.



Quote Details Print

Billing Address Accounts Payable

Lee County Schools PO BOX 1010 SANFORD, NC 27331 Phone 919-774-0000 **Shipping Address**

Accounts Payable Lee County Schools PO BOX 1010 SANFORD, NC 27331 Phone 919-774-0000

Otv **Product Description** Availability **Delivery Address** Price **Total Price** 12 ASUS - VA24EHE 23.8" Full In Stock \$102.83 Shipping Address \$1,233.96 HD LED LCD Monitor - 16:9 Ship to my address Catalog Open Market Item BB21416078 Manufacturer VA24EHE Standard Delivery

Product Total: \$1,233.96

Tax: \$86.38

Quote Number: 244216793

QUOTE TOTAL: \$1,320.34

Expiration Date

• 02/09/24

Shipping Method(s)

(Instructions:)

Payment Type

Business Advantage Account**********0866

Best Buy For Business is pleased to provide the quote you requested. We realize you have numerous options for procuring IT Products and appreciate that you contacted us. We will honor the prices on this quote through the expiration date identified above.

Given the rapid change in technology and product availability, Best Buy For Business cannot guarantee all the items on this quote will be available for purchase in the future. In that case, we will work together to make changes or modifications to your quote or order.

Thank you for partnering with Best Buy For Business on this opportunity.

The terms and conditions ("Terms") set forth herein constitute the agreement of Best Buy to sell to Client, and Client to purchase from Best Buy, products ("Products") and any associated services ("Services") and are binding on all Best Buy Business™ clients ("Clients"). Client accepts these Terms by making a purchase from or placing an order with Best Buy Business or shopping on the Best Buy Business website www.bestbuy.com/BusinessTerms ("Site"). For clarification, references to "You," "Client" or "customer" means business customer. Except in those instances where Best Buy Business and a Client enter into a separate written contract for the purchase of Products and/or Services providing for separate terms of sale, these Terms will apply. THESE TERMS ARE LIMITED TO THOSE CONTAINED HEREIN. BEST BUY HEREBY REJECTS AND WILL NOT OTHERWISE BE BOUND BY ANY ADDITIONAL OR DIFFERENT TERMS IN ANY FORM DELIVERED BY YOU TO BEST BUY, WHETHER ORAL, WRITTEN, ELECTRONIC OR IMPLIED. PURCHASE ORDERS ARE FOR ADMINISTRATIVE PURPOSES ONLY.

Best Buy Business offers products that may not be available at our retail stores. Product pricing, availability and offers may vary from our retail stores. BEST BUY, the BEST BUY logo, the tag design, GEEK SQUAD, BEST BUY BUSINESS and the BEST BUY BUSINESS logo are trademarks of Best Buy. © 2024 Best Buy. All Rights Reserved.

Terms and Conditions | Privacy Policy | Returns Policy | California Privacy Rights



Quote

#306506

01/10/2024

Bluum USA, Inc. (f.k.a. Troxell Communications Inc.) 4675 E. Cotton Center Blvd Suite 155 Phoenix AZ 85040 www.bluum.com

Bill To Jennifer Lloyd Lee County Schools 106 Gordon Street SANFORD NC 27331

Memo: Proposal Prepared For Jenn Lloyd

Ship To Jennifer Lloyd Lee County Schools 919-774-6226 106 Gordon Street Sanford NC 27330

Expires	Sales Rep	Contract	Terms	
01/31/2024	870 Darryl Dutcher		Net 30	

Qty	Item	MFG	Price	Ext. Price
12	Product Required VA24EHE 24" MONITOR	Asus	\$107.00	\$1,284.00

**Bluum provides professional development from former educators who are committed to providing world class instructional training. With the purchase of educational technology, we recommend including PD to ensure effective adoption. Ask about our getting started package, 3-hour remote and 6-hour onsite training.

 Subtotal
 \$1,284.00

 Tax Total (7%)
 \$89.88

 Shipping Cost
 \$0.00

 Total
 \$1,373.88

To accept this quotation, sign here :	
Printed Name/Title/Date :	
Shipping and Billing Address listed on quote are accurate : []Yes []No	

This document is subject to the terms and conditions found here: www.bluum.com/terms-conditions. For quotes over \$25,000 a Purchase Order is required, please reference this quote number on your PO. If purchasing via credit card a 2.5% surcharge fee will apply. For questions please contact your Bluum Account Representative.

Please inspect product upon delivery. All claims for defective merchandise or errors in shipping must be made within five days after receipt of goods. Returns require an authorization number and must be made within 30 days. A minimum 25% restocking fee may apply with the exception of out of box failures and replacements under warranty.



1 of 1



Pricing Proposal

Quotation #: 24364424 Created On: 1/11/2024 Valid Until: 2/21/2024

NC-County of Lee Schools

Inside Account Executive

Jenn Lloyd

106 Gordon St. ATTN: Rebel Hunter Sanford, NC 27330 United States

Phone: (919) 774-6226

Fax:

Email: jlloyd@lee.k12.nc.us

Ryan Doelger

290 Davidson Ave Somerset, NJ 08873 Phone: 732-584-8250

Fax:

Email: ryan_doelger@shi.com

All Prices are in US Dollar (USD)

	Product	Qty	Your Price	Total
1	ASUS VA24EHE - LED monitor - 23.8" - 1920 x 1080 Full HD (1080p) - IPS - 250 cd/m - 1000:1 - 5 ms - HDMI, DVI-D, VGA - black ASUS - Part#: VA24EHE Contract Name: Open Market Contract #: Open Market	12	\$103.96	\$1,247.52
			Subtotal	\$1,247.52
			Shipping	\$102.94
			*Tax	\$94.53
			Total	\$1,444.99
	*Tax is estimated. Inv	oice will	include the full and	d final tax due.

Additional Comments

Hardware items on this quote may be updated to reflect changes due to industry wide constraints and fluctuations.

Please note, if Emergency Connectivity Funds (ECF) will be used to pay for all or part of this quote, please let us know as we will need to ensure compliance with the funding program.

Thank you for choosing SHI International Corp! The pricing offered on this quote proposal is valid through the expiration date set above. To ensure the best level of service, please provide End User Name, Phone Number, Email Address and applicable Contract Number when submitting a Purchase Order.

SHI International Corp. is 100% Minority Owned, Woman Owned Business. TAX ID# 22-3009648; DUNS# 61-1429481; CCR# 61-243957G; CAGE 1HTF0

The products offered under this proposal are Open Market and resold in accordance with the terms and conditions at <u>SHI Online</u> <u>Customer Resale Terms and Conditions</u>.



LEE COUNTY SCHOOLS BID EVALUATION FORM

PROJECT INFORMATION:

11-41 Probook 450 G10 Part # 822 P3UT 2- HP Pro 400 Sff G9 desktop part # 83 R12 UT

IDENTIFIED VENDORS:

VENDOR NUMBER	VENDOR NAME	PRODUCT BRAND OFFERED
V1	Insight	part 822 P3UT and part # 89 m 69 UT
V2	Netcom	part # 822P3UT and Part # 83RIZUT
V3	Howard	part # 822 P3UT and part # 89 m 69 UT
V4		
V5		

EVALUATION CRITERIA (FOR AUGMENTING CURRENT ENVIRONMENT):

CRITERA EXPLANATIONS:

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- COST OF INELIGIBLE GOODS AND SERVICES: Price of ineligible services or equipment

CRITERIA	V1	V2	V3		
PRICE (35 points)	30	35	25		
HARDWARE COMPATIBILITY (25 points)	25	25	25		
PRIOR EXPERIENCE (15 points)	15	15	15		
ADHERENCE TO RFP (15 points)	15	15	15		
SUPPORT COMPATIBILITY (10 points)	10	10	10		
TOTAL (100 points)	95	100	90		

Evaluator:	amp And	Rebecca Measamer
Date:	1/12/24	

ee County Schools bulk order Quote due by 1/12/24 at 5pm.

messages

enn Lloyd <illoyd@lee.k12.nc.us>

Thu, Jan 11, 2024 at 10:05 Al

o: Jenn Lloyd <jlloyd@lee.k12.nc.us>

cc: Rebecca Measamer <rmeasamer@lee.k12.nc.us>, Todd Jordan <tjordan@netcombsi.com>, kfunderburk@howard.com, "Latiolais, lark" <Mark.Latiolais@insight.com>

This order will be approved by the BOE and the order placed for 1 site for desktops and 2 sites for laptops. Pricing will need to be good through 2/20/24.

Can you send me a quote for

11 - HP 450 G10 laptop, 8GB RAM, 256GB SSD, windows 11, 1year warranty, item # 822P3UT 2- HP Pro 400 SFF G9 desktop, i5 intel core processor 12th gen, 8GB RAM, 256 SSD drive, 3 year warranty, item # U11BYE, 11 - HP intel wireless cards item #7MR177 (comparable substitution acceptable for wireless card)

Quote due by 1/12/24 at 5pm

Jenn Lloyd Lee County Schools, Technology Department 919-774-6226

ielly Funderburk <kfunderburk@howard.com> o: Jenn Lloyd <jlloyd@lee.k12.nc.us>

Thu, Jan 11, 2024 at 10:08 Al

Thanks Jenn!

I will get you that quote back as soon as possible!

Kelly

Kelly Funderburk

NC K-12 Education Sales Rep

Mobile: (910) 742-6091

Email: kfunderburk@howard.com













From: Jenn Lloyd <jlloyd@lee.k12.nc.us> Sent: Thursday, January 11, 2024 10:06 AM To: Jenn Lloyd <jlloyd@lee.k12.nc.us>

Subject: Lee County Schools bulk order Quote due by 1/12/24 at 5pm

CAUTION

This email originated from outside of Howard Industries. Do not click links or open attachments unless you recognize the sender and know the content is safe.

[Quoted text hidden]

E-mail correspondence to and from this sender may be subject to the North Carolina Public Records Law and may be disclosed to third parties.

.elly Funderburk <kfunderburk@howard.com> o: Jenn Lloyd <jlloyd@lee.k12.nc.us>

Fri, Jan 12, 2024 at 6:03 PI

Good evening!

I have attached your quote. Please let me know if you have any questions.

Thanks and have a great weekend!

Kelly

Kelly Funderburk

NC K-12 Education Sales Rep

Mobile: (910) 742-6091

Email: kfunderburk@howard.com















From: Jenn Lloyd <illoyd@lee.k12.nc.us> Sent: Thursday, January 11, 2024 10:06 AM To: Jenn Lloyd <illoyd@lee.k12.nc.us>

Subject: Lee County Schools bulk order Quote due by 1/12/24 at 5pm

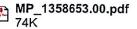
CAUTION

This email originated from outside of Howard Industries. Do not click links or open attachments unless you recognize the sender and know the content is safe.

This order will be approved by the BOE and the order placed for 1 site for desktops and 2 sites for laptops. Pricing will need to be good through 2/20/24.

[Quoted text hidden]

[Quoted text hidden]





2900 Village Drive Fayetteville, NC 28304 910-486-5040 Phone 910-486-4937 Fax 888-638-8880 Toll Free Quotation ote #

Quote #	Date
61892	01/12/2024
Sales	s Rep
Todd	Jordan
910-48	86-5040

For:	Customer # LS1032	Phones:			
Jen Lloyd Lee County Schools 106 Gordon Street Sanford NC 27330		PO#	Terms NET 15	Ship Date	Ship Via

	Part	Description	Qty	Price	Extended
1)	83R12UT	HP Pro 400 SFF G9 Desktop, Intel Core i5 12th Gen 12500 Hexacore Processor, 8GB Ram, 256GB SSD, small form factor, Windows 11 Pro, 1 year warranty	2	620.62	1,241.24
2)	U11BYE	HP 3 Year Warranty Upgrade	2	9.28	18.56
3)	7MR177	HP Intel Wireless Card Netcom will install wireless card for LCS at no additional charge	2	18.78	37.56
4)	822P3UT	HP ProBook 450 G10, 15.6 inch Display, Intel i5 13th Gen 1335U Processor, 8GB Ram, 256GB SSD, wireless ax, webcam, Windows 10 Pro 64 bit, 1 Year warranty	11	751.36	8,264.96

 Subtotal
 9,562.32

 Tax 7.000%
 669.36

 Total
 \$10,231.68

INSIGHT PUBLIC SECTOR SLED 2701 E INSIGHT WAY CHANDLER AZ 85286-1930

Tel: 800-467-4448

Page 1 of 2

Quotation

Quotation Number: 0227012134 Document Date: 11-JAN-2024

PO Number PO release:

Sales Rep

: Mark Latiolais

Email : MARK.LATIOLAIS@INSIGHT.COM
Telephone :

SOLD-TO PARTY 10169408

LEE COUNTY SCHOOLS PO BOX 1010

SANFORD NC 27331-1010

SHIP-TO

LEE COUNTY SCHOOLS 106 GORDON ST

SANFORD NC 27330-3960

We deliver according to the following terms:

Payment Terms

: Net 30 days

Ship Via

: Insight Assigned Carrier/Ground

Terms of Delivery

: FOB DESTINATION

Currency

: USD

Material	Material Description	Quantity	Unit Price	Extended Price
822P3UT#ABA	HP ProBook 450 G10 Notebook - Wolf Pro Security - 15.6" - Intel Core i5 1335U - 8 GB RAM - 256 GB SSD - US - with HP Wolf Pro Security Edition (1 year) OPEN MARKET	11	775.29	8,528.19
<u>U11BYE</u>	Electronic HP Care Pack Next Business Day Hardware Support with Optional Customer Self Repair - extended service agreement - 3 years - on-site OPEN MARKET	2	9.42	18.84
AX200.NGWG.DTK	Intel Wi-Fi 6 AX200 - Desktop Kit - network adapter - M.2 2230 OPEN MARKET	11	18.44	202.84
89M69UT#ABA	HP Pro SFF 400 Gen 9 - Intel Core i5-3500 - 8 GB RAM - 256 GB SSD OPEN MARKET	2	712.88	1,425.76
			Product Subtotal Services Subtotal TAX	10,156.79 18.84 712.29
			Total	10,887.92



Page 2 of 2



PURCHASE ORDER REQUIREMENTS: Quote Number:227012134	
Purchase Order Number:	
Authorized by/Title:	(please print)
Authorized Signature:	Date:
Additional signature, where required	
Authorized by/Title:	(please print)
Authorized Signature:	Date:
Thank you for choosing Insight. Please contact us with any que solution offering.	stions or for additional information about Insight's complete IT
Sincerely,	
Mark Latiolais	
MARK.LATIOLAIS@INSIGHT.COM	

Insight Global Finance has a wide variety of flexible financing options and technology refresh solutions. Contact your Insight representative for an innovative approach to maximizing your technology and developing a strategy to manage your financial options.

This purchase is subject to Insight's online Terms of Sale unless you have a separate purchase agreement signed by you and Insight, in which case, that separate agreement will govern. Insight's online Terms of Sale can be found at the "terms-and-policies" link below.

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888.912.3151 general-601.399.5077 fax 888.323.3151 technical support

A Division of Howard Industries, Inc. www.Howard.com

Online Quotation

Quote No: Customer Name: Company Name: MP 1358653.00

Jennifer Lloyd

Lee County School District

Quote Date: Phone Number:

January 11, 2024 919-774-6226

Fax Number:

Quote Name:

Item 1				
Category	Description	Qty.	Unit Price	Ext. Price
System Type:	Accessories			
1:	HP ProBook 450 G10 Notebook - Wolf Pro Security - Intel Core i5 1335U / 1.3 GHz - Win 11 Pro - Intel Iris Xe Graphics - 8 GB RAM - 256 GB SSD NVMe - 15.6' IPS 1920 x 1080 (Full HD) - 802.11a/b/g/n/ac/ax (Wi-Fi 6E), Bluetooth 5.3 wireless card - pike silver plastic - kbd: US - with HP Wolf Pro Security Edition (1 year) MPN: 822P3UT#ABA	11	\$848.00	\$9,328.00

Sub-Total: \$9,328.00

Shipping & Handling: Included

Taxes: \$ 652.96

Total for Item 1: \$9,980.96

This Quote will expire on February 10, 2024.
Please include your Quote Number on your Purchase Order.

Category	Description	Qty.	Unit Price	Ext. Price
System Type:	Accessories			
1:	HP Pro 400 G9 - Wolf Pro Security - SFF - Core i5 13500 / 2.5 GHz - RAM 8 GB - SSD 256 GB - NVMe - UHD Graphics 730 - GigE - Win 11 Pro - monitor: none - keyboard: US - Smart Buy - with HP Wolf Pro Security Edition (1 year) MPN: 89M69UT#ABA	2	\$858.00	\$1,716.00
2:	Electronic HP Care Pack Next Business Day Active Care Service - Extended service agreement - parts and labor - 3 years - on-site - 9x5 - response time: NBD - for HP 205 G8, 28X, 295 G8; Pro 260 G9, 280 G9, 290 G9, 400 G9; ProOne 240 G10, 240 G9, 440 G9 MPN: U18HWE	2	\$25.50	\$51.00
3:	Intel WI-FI 6 GIG+ Desktop Kit MPN: 7mr177	2	\$19.45	\$38.90
			Sub-Total:	\$1,805.90

Shipping & Handling: Included

Taxes: \$ 126.41

Total for Item 2: \$1,932.31

This Quote will expire on February 10, 2024. Please include your Quote Number on your Purchase Order.

Total for all pre-configured items

Sub-Total: \$11,133.90

Shipping & Handling :

Included

Taxes:

\$ 779.37

Total:

\$11,913.27

Notes:



LEE COUNTY SCHOOLS BID EVALUATION FORM

PROJECT INFORMATION:

35-HP chromebook X360 11 G4 EE W/ Google Management license part # 3VOG4UT

IDENTIFIED VENDORS:

VENDOR NUMBER	VENDOR NAME	PRODUCT BRAND OFFERED
V1	Netcom	part# 3VOG4UT
V2	SCW	No ans.
V3.	SHI	part # 3VOG4UT
V4		·
V5		

EVALUATION CRITERIA (FOR AUGMENTING CURRENT ENVIRONMENT):

CRITERA EXPLANATIONS:

- HARDWARE COMPATIBILITY: Quoted equipment works seamlessly with existing equipment
- SUPPORT COMPATIBILITY: Quoted equipment can be supported in a manner equal to the existing equipment
- PRIOR EXPERIENCE: Previous experience with purchasing goods or services from vendor
- COST OF ELIGIBLE GOODS AND SERVICES: Price of eligible services or equipment
- COST OF INELIGIBLE GOODS AND SERVICES: Price of ineligible services or equipment

CRITERIA	V1	V2	V3			
PRICE (35 points)	35	Ø	30		L 17%	
HARDWARE COMPATIBILITY (25 points)	25	Ø	25			
PRIOR EXPERIENCE (15 points)	15	ø	15			
ADHERENCE TO RFP (15 points)	15	8	15			
SUPPORT COMPATIBILITY (10 points)	10	Ø	10			
TOTAL (100 points)	100	Ø	95			

Evaluator:	Jenny Hoyd	Rebecca Mcasamer
Date:	1/12/24	



X360

ee County Schools bulk order Quote due by 1/12/24 at 5pm.

messages

enn Lloyd <jlloyd@lee.k12.nc.us>

Thu, Jan 11, 2024 at 9:33 Al

o: Jenn Lloyd <jlloyd@lee.k12.nc_us>

cc: Todd Jordan tiordan@netcombsi.com, Junius Brodnax junius.brodnax@scw.com, Ryan Doelger ryan_doelger@shi.com, ebecca Measamer rebecca Measamer@lee.k12.nc.us

This order will be approved by the BOE and the order placed for 3 sites. Pricing will need to be good through 2/20/24.

Can you send me a quote for 35 - HP CHromebook x360 11 G4EE rugged touchscreen 2 in 1 chromebook item # 3V0G4UT and 35 Google Management licenses

Quote due by 1/12/24 at 5pm

Jenn Lloyd Lee County Schools, Technology Department 919-774-6226

:yan Doelger <Ryan_Doelger@shi.com>
o: Jenn Lloyd <jlloyd@lee.k12.nc.us>

Fri, Jan 12, 2024 at 4:10 PI

Hey Jenn,

Here is your quote, let me know if you have any questions.

Thanks,



Ryan Doelger

PubSec Inside Account Executive

Office: +17325848250

Review SHI's privacy policy to manage communications.

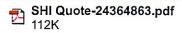
From: Jenn Lloyd <jlloyd@lee.k12.nc.us> Sent: Thursday, January 11, 2024 9:33 AM To: Jenn Lloyd <jlloyd@lee.k12.nc.us>

Subject: Lee County Schools bulk order Quote due by 1/12/24 at 5pm

External Sender: Use caution with links/attachments.

[Quoted text hidden]

E-mail correspondence to and from this sender may be subject to the North Carolina Public Records Law and may be disclosed to third parties.





Pricing Proposal

Quotation #: 24364863 Created On: 1/11/2024 Valid Until: 2/21/2024

NC-County of Lee Schools

Inside Account Executive

Jenn Lloyd

106 Gordon St. ATTN: Rebel Hunter Sanford, NC 27330 United States

Phone: (919) 774-6226

Fax:

Email: jlloyd@lee.k12.nc.us

Ryan Doelger

290 Davidson Ave Somerset, NJ 08873 Phone: 732-584-8250

Fax:

Email: ryan_doelger@shi.com

All Prices are in US Dollar (USD)

	Product	Qty	Your Price	Total
1	HP Chromebook x360 11 G4 Education Edition - Flip design - Intel Celeron - N4500 / up to 2.8 GHz - Chrome OS - UHD Graphics - 4 GB RAM - 32 GB eMMC - 11.6" IPS touchscreen 1366 x 768 (HD) - 802.11a/b/g/n/ac/ax - kbd: US HP, Inc Part#: 3V0G4UT#ABA Contract Name: Open Market Contract #: Open Market	35	\$346.43	\$12,125.05
2	Chrome OS Management Console - License - academic Google - Part#: CROSSWDISEDUNEW Contract Name: Open Market Contract #: Open Market	35	\$32.32	\$1,131.20
			Subtotal *Tax	\$13,256.25 \$927.94
			Total	\$14,184.19

*Tax is estimated. Invoice will include the full and final tax due.

Additional Comments

Please Note: HP, Inc. has a zero returns policy on custom build PCs. Ink and toner are also considered non-returnable. For these products, orders are non-cancellable and non-returnable from point of order.

Please note: Google has a zero returns policy.

Hardware items on this quote may be updated to reflect changes due to industry wide constraints and fluctuations.

Please note, if Emergency Connectivity Funds (ECF) will be used to pay for all or part of this quote, please let us know as we will need to ensure compliance with the funding program.

Thank you for choosing SHI International Corp! The pricing offered on this quote proposal is valid through the expiration date set above. To ensure the best level of service, please provide End User Name, Phone Number, Email Address and applicable Contract



2900 Village Drive Fayetteville, NC 28304 910-486-5040 Phone 910-486-4937 Fax 888-638-8880 Toll Free

Quote#	Date
61888	01/12/2024
Sale	s Rep
Todd	Jordan

910-486-5040

Quotation

For: Customer # LS1032	Phones:
Jen Lloyd Lee County Schools 106 Gordon Street Sanford NC 27330	PO# Terms Ship Date Ship Via NET 15

Part	Description	Qty	Price	Extended
) 3V0G4UT	HP Chromebook x360 11 G4 EE Rugged, 11.6 inch Touchscreen	35	320.03	11,201.0
	Convertible 2 in 1 Chromebook, HP USI Garaged Pen, HD 1366 x			
	768 res, Intel Celeron N4500 Dual Core Processor, 4 GB Ram, 12			
	hour battery, 802.11 ac/ax wireless, 1 year warranty			
) CROS-SW-DIS-EDU	Google Management Console License	35	31,00	1,085.00
	Netcom will provide onsite pickup and delivery warranty repair	1		•
	at no charge to lcs			

 Subtotal
 12,286.05

 Tax 7.000%
 860.02

 Total
 \$13,146.07

3ulk order #2 Lee County Schools

message

enn Lloyd <jlloyd@lee.k12.nc.us>

- o: Mike Muirhead mmuirhead@nextwavetek.com
- :c: Rebecca Measamer <rmeasamer@lee.k12.nc.us>

Wed, Jan 10, 2024 at 11:17 AI

Mike,

We are doing another bulk order for the district. Pricing will need to be good until 2/20/24 to get BOE approval and place the order.

Can you please send me a quote for 52 - 65" interactive panels with on board computers, 8 mobile stands and the rest wall mounts. This total will be for 8 different sites.

Jenn Lloyd Lee County Schools, Technology Department 919-774-6226



NextWaveTEK, LLC 500 Vercelli Drive Clayton, NC 27527

910-409-7731 www.NextWaveTEK.com Quote Number:

NWT-011124-1054

Customer:

Lee County Schools

Customer Contact: Email: Jenn Lloyd jlloyd@lee.k12.nc.us

Ship To:

Bill To:

Part Number	Description	Qty	Unit Price	Extended Price
	Clear Touch Interactive			
	65" 6000A+ Series Interactive Panel with USB HID / AGG / 40 Points of Touch - Ultra HD. 2.2 Audio With			
CTI-6065A+UH40	2X18W Speaker and 2X8W Sub. Integrated 8-Mic Array. Includes wall mount and Android wireless module	52	\$ 2,511.00	\$ 130,572.00
	and 5 year warranty.			
	 Included with every panel is the following Software Suite: Chorus, Chorus Online, Collage, Snowflake, Snowflake.Live, and Command. 			
CTI-PCOPS-PC15-SM	OPS PC Module - Intel i5 Six Core, 10th Gen / 16GB DDR4 / 256GB SSD / Ultra HD (No Operating	52	\$ 876.62	\$ 45,584.37
C11-FCOF3-FC13-3IVI	System)	32	\$ 870.02	3 45,564.57
CTI-STAND-FIXM-V3	Fixed Mobile Stand - Curve-Shaped Open Base with Manual Height Adjustment & Cable Management	8	\$ 525.00	\$ 4,200.00
	NextWaveTEK On-Site Engineering Services	100-0		
NWT-LAB3-CTI	Shipping, onsite installation, configuration setup	1	\$ 13,857.50	\$ 13,857.50
	NextWaveTEK On-Site Engineering Services & Material Total			\$ 194,213.87
	Tax (7.00%)			\$ 13,594.97
	Quote Total			\$ 207,808.84
				1

All Quotes are Confidential and for the benefit of NextWaveTEK, LLC. Standard Terms & Conditions apply. Net 30 day payment terms are extended. Shipping is FOB NextWaveTEK, LLC. Please email purchase orders to smuirhead@NextWaveTEK.com



LEE COUNTY SCHOOLS BID EVALUATION FORM

PROJECT INFORMATION:

32-Logitech MK270 Wireless Keyboard and

IDENTIFIED VENDORS:

VENDOR NUMBER	VENDOR NAME	PRODUCT BRAND OFFERED
V1	Best Buy	Logitech mk270 Combo
V2	Bluum	Logitech MK270 Combo
V3	Zones	Logitech MK270 Combo
V4		7.,
V5		

EVALUATION CRITERIA (FOR AUGMENTING CURRENT ENVIRONMENT):

CRITERA EXPLANATIONS:

- HARDWARE COMPATIBILITY: Quoted equipment works seamlessly with existing equipment
- SUPPORT COMPATIBILITY: Quoted equipment can be supported in a manner equal to the existing equipment
- PRIOR EXPERIENCE: Previous experience with purchasing goods or services from vendor
- COST OF ELIGIBLE GOODS AND SERVICES: Price of eligible services or equipment
- COST OF INELIGIBLE GOODS AND SERVICES: Price of ineligible services or equipment

CRITERIA	V1	V2	V3				
PRICE (35 points)	35	30	25	100		3810154	
HARDWARE COMPATIBILITY (25 points)	25	25	25				
PRIOR EXPERIENCE (15 points)	15	15	15				(1.79) Table
ADHERENCE TO RFP (15 points)	15	15	15	The party is the party of the	of Inches of Walk	The May 10 that	A-4-70 (3-1-74)
SUPPORT COMPATIBILITY (10 points)	10	10	10	T	* 1	2247	
TOTAL (100 points)	100	95	90			TORNE WAR	rusementa sa

Evaluator:	Jones Myd	7	Rebecca Measamer
Date:	1/12/24		



Keyboarde mouse Jenn Lloyd < jlloyd@lee.k12.nc.us

.ee County Schools bulk order Due 1/11/24 @ 5pm

messages

enn Lloyd <jlloyd@lee.k12.nc.us>
o: Jenn Lloyd <jlloyd@lee.k12.nc.us>

Wed, Jan 10, 2024 at 11:35 Al

cc: Darryl Dutcher <darryl.dutcher@bluum.com>, "Radil, Andy" <andy.radil@bestbuy.com>, Hassan Khan <hassan.khan@zones.com>, ebecca Measamer <rmeasamer@lee.k12.nc.us>

This order will be approved by the BOE and the order placed for 3 sites. Pricing will need to be good through 2/20/24.

Can you please send me a quote for 32 - Logitech MK270 wireless keyboard and mouse.

Jenn Lloyd Lee County Schools, Technology Department 919-774-6226

enn Lloyd <jlloyd@lee.k12.nc.us>
o: Jenn Lloyd <jlloyd@lee.k12.nc.us>
cc: Bill.younas@zones.com

Wed, Jan 10, 2024 at 11:37 AI

Hassan referenced you to get this since he is out of the office. Quote due 1/11/24 at 5pm [Quoted text hidden]

Quote Details & Print

Billing Address Accounts Payable

Lee County Schools PO BOX 1010 SANFORD, NC 27331 Phone 919-774-0000 **Shipping Address**

Accounts Payable Lee County Schools PO BOX 1010 SANFORD, NC 27331 Phone 919-774-0000

Qty	Product Description	Availability	Delivery Address	Price	Total Price
32	Logitech - MK270 Full-size Wireless Membrane Keyboard and Mouse Bundle for PC - Black Catalog Open Market Item BB19242012 Manufacturer 920-004536 Standard Delivery	In Stock	Shipping Address Ship to my address	\$22.25	\$712.00

Product Total: \$712.00

Tax: \$49.84

Quote Number: 244216842

QUOTE TOTAL: \$761.84

Expiration Date

• 02/09/24

Shipping Method(s)

• (Instructions:)

Payment Type

Business Advantage Account*********0866

Best Buy For Business is pleased to provide the quote you requested. We realize you have numerous options for procuring IT Products and appreciate that you contacted us. We will honor the prices on this quote through the expiration date identified above.

Given the rapid change in technology and product availability, Best Buy For Business cannot guarantee all the items on this quote will be available for purchase in the future. In that case, we will work together to make changes or modifications to your quote or order.

Thank you for partnering with Best Buy For Business on this opportunity.

The terms and conditions ("Terms") set forth herein constitute the agreement of Best Buy to sell to Client, and Client to purchase from Best Buy, products ("Products") and any associated services ("Services") and are binding on all Best Buy Business** clients ("Clients"). Client accepts these Terms by making a purchase from or placing an order with Best Buy Business or shopping on the Best Buy Business website www.bestbuy.com/BusinessTerms ("Site"). For clarification, references to "You," "Client" or "customer" means business customer. Except in those instances where Best Buy Business and a Client enter into a separate written contract for the purchase of Products and/or Services providing for separate terms of sale, these Terms will apply. THESE TERMS ARE LIMITED TO THOSE CONTAINED HEREIN. BEST BUY HEREBY REJECTS AND WILL NOT OTHERWISE BE BOUND BY ANY ADDITIONAL OR DIFFERENT TERMS IN ANY FORM DELIVERED BY YOU TO BEST BUY, WHETHER ORAL, WRITTEN, ELECTRONIC OR IMPLIED. PURCHASE ORDERS ARE FOR ADMINISTRATIVE PURPOSES ONLY.

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Quote

#306506

01/10/2024

Bluum USA, Inc. (f.k.a. Troxell Communications Inc.) 4675 E. Cotton Center Blvd Suite 155 Phoenix AZ 85040 www.bluum.com

Bill To Jennifer Lloyd Lee County Schools 106 Gordon Street SANFORD NC 27331 Ship To Jennifer Lloyd Lee County Schools 919-774-6226 106 Gordon Street Sanford NC 27330

Memo: Proposal Prepared For Jenn Lloyd

Expires	Sales Rep	Contract	Terms	
01/31/2024	870 Darryl Dutcher	Net 30		

Qty	Item	MFG	Price	Ext. Price
32	Product Required 920-004536 MK270 Keyboard/Mouse Combo	Logitech	\$23.40	\$748.80

**Bluum provides professional development from former educators who are committed to providing world class instructional training. With the purchase of educational technology, we recommend including PD to ensure effective adoption. Ask about our getting started package, 3-hour remote and 6-hour onsite training.

Subtotal	\$748.80
Tax Total (7%)	\$52.42
Shipping Cost	\$0.00
Total	\$801.22

To accept this quotation, sign here :	
Printed Name/Title/Date :	
Shipping and Billing Address listed on quote are accurate : []Yes[]No	

This document is subject to the terms and conditions found here: www.bluum.com/terms-conditions. For quotes over \$25,000 a Purchase Order is required, please reference this quote number on your PO. If purchasing via credit card a 2.5% surcharge fee will apply. For questions please contact your Bluum Account Representative.

Please inspect product upon delivery. All claims for defective merchandise or errors in shipping must be made within five days after receipt of goods. Returns require an authorization number and must be made within 30 days. A minimum 25% restocking fee may apply with the exception of out of box failures and replacements under warranty.



1 of 1



1/10/2024

Bill To:

LEE COUNTY SCHOOLS PO BOX 1010 SANFORD,NC 27330 Phone: (919) 774-6226 Ship To: JENNIFER LLOYD LEE COUNTY SCHOOLS 106 GORDON ST SANFORD, NC 27330 USA Account # 0071069508 Quote : K2217658

PO# :

Software prices subject to change

Hardware quotes are valid for 7 business days

Memory Prices are valid for 24 hours only, call for verification

REMIT PAYMENT TO: ZONES LLC PO Box 737040 DALLAS TX 75373-7040 PLEASE SEND PURCHASE ORDERS DIRECTLY TO YOUR ZONES LLC ACCOUNT MANAGER VIA FAX OR EMAIL

Hassan Khan Account Executive Phone:2535457275

Email:hassan.khan@zones.com

Item #	Qty.	Mfr. Name	Description	Manufacturers Part #	Unit Price	Total
A 04057699	32	LOGITECH	Logitech MK270 Wireless Keyboard and Mouse Combo - 920-004536	920-004536	\$25.00	\$800.00

ASK US ABOUT

Installation Services

Con-site Technical Services and Hourly Service Rates

Remote Help Desk and Remote Network OS Support

Sub-Total:

\$800.00

Estimated Sales Tax:

\$63.06

FedEx Ground:

\$100.86

Grand Total:

\$963.92

Visit us on the web: http://www.zones.com

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ZONES LLC 1102 15th Street S.W. Suite 102 Auburn, USA 98001 Phone: (800) 419-9663



CERTIFIED

as an NMBC
MINORITY BUSINESS
ENTERPRISE
by the NMSDC

IN THE EVENT THAT YOU HAVE AN AGREEMENT ("AGREEMENT") IN PLACE WITH ZONES, LLC, THAT GOVERNS THE SALE ASSOCIATED HEREWITH, SUCH AGREEMENT SHALL GOVERN; OTHERWISE THE TERMS AND CONDITIONS OF SALE SET FORTH ON THE WEB PAGE LINKED AT WWW.ZONES.COMTERNSOFSALE ("TERMS AND CONDITIONS"), SHALL GOVERN, ZONES EXPRESSLY LIMITS THE TERMS AND CONDITIONS OF THIS SALE TO SUCH AGREEMENT OR THE TERMS AND CONDITIONS, AS APPLICABLE, AND ZONES EXPRESSLY OBJECTS TO, DISCLAIMS, AND REJECTS ANY DIFFERENT OR ADDITIONAL TERMS SET FORTH IN ANY OF CUSTOMER'S DOCUMENTS OR COMMUNICATIONS. ZONES EXPRESSLY DISCLAIMS ALL EXPRESS AND IMPLIED WARRANTIES.



LEE COUNTY SCHOOLS BID EVALUATION FORM

PROJECT INFORMATION:

20 - LG 65" Smart TV, 20 - Articulating Wall mount

IDENTIFIED VENDORS:

VENDOR NUMBER	VENDOR NAME	PRODUCT BRAND OFFERED
V1	SHI	LG 65" TV + wall mount
V2	GOV Connection	No ans.
V3	Best Buy	LGTV + Wall mount
V4		(65")
V5		

EVALUATION CRITERIA (FOR AUGMENTING CURRENT ENVIRONMENT):

CRITERA EXPLANATIONS:

- HARDWARE COMPATIBILITY: Quoted equipment works seamlessly with existing equipment
- SUPPORT COMPATIBILITY: Quoted equipment can be supported in a manner equal to the existing equipment
- PRIOR EXPERIENCE: Previous experience with purchasing goods or services from vendor
- COST OF ELIGIBLE GOODS AND SERVICES: Price of eligible services or equipment
- COST OF INELIGIBLE GOODS AND SERVICES: Price of ineligible services or equipment

CRITERIA	V1	V2	V3			
PRICE (35 points)	30	D	35		No.	
HARDWARE COMPATIBILITY (25 points)	25	Ø	25			
PRIOR EXPERIENCE (15 points)	15	0	15			
ADHERENCE TO RFP (15 points)	15	Ø	15			
SUPPORT COMPATIBILITY (10 points)	10	0	10			
TOTAL (100 points)	95	8	100			

Evaluator:	Jennife Lloyd +	Rebecca Measamer
Date:	1/12/24	





.ee County Schools bulk order quote DUE 1/11/24 AT 5PM

message

enn Lloyd <jlloyd@lee.k12.nc.us>

Wed, Jan 10, 2024 at 11:24 AI

o: Jenn Lloyd <jlloyd@lee.k12.nc.us>

cc: "Radil, Andy" <andy.radil@bestbuy.com>, Phil Bishop <phil.bishop@connection.com>, Ryan Doelger <ryan_doelger@shi.com>, :ebecca Measamer <rmeasamer@lee.k12.nc.us>

This order will be approved by the BOE and the order placed for 2 sites. Pricing will need to be good through 2/20/24.

Can you please send me a quote for 20 - 65" LG smart TV's (best price) and 20- articulating wall mounts (best price).

QUOTES DUE BY 1/11/24 AT 5PM

Jenn Lloyd Lee County Schools, Technology Department 919-774-6226

Quote Details Print

Quote Number: 244218530

Billing Address Accounts Payable

Lee County Schools PO BOX 1010 SANFORD, NC 27331 Phone 919-774-0000 Shipping Address

Accounts Payable Lee County Schools PO BOX 1010 SANFORD, NC 27331 Phone 919-774-0000

Qty	Product Description	Availability	Delivery Address	Price	Total Price
20	LG - 65" Class UQ75 Series LED 4K UHD Smart webOS TV Catalog Open Market Item BB21973422 Manufacturer 65UQ7570PUJ	In Stock	Shipping Address Ship to my address	\$449.99	\$8,999.80
20	Insignia™ - Full-Motion Wall Mount for 47" - 90" TVs - Extends 25.2" - Black Catalog Open Market Item BB20834247 Manufacturer NS- HTVMM170 Special Delivery	Usually ships in 3 - 5 days	Shipping Address Ship to my address	\$58.72	\$1,174.40

Product Total:

\$10,174.20

Tax:

\$712.19

QUOTE TOTAL:

\$10,886.39

Expiration Date

• 02/09/24

Shipping Method(s)

• (Instructions:)

Payment Type

• Business Advantage Account*********0866

Best Buy For Business is pleased to provide the quote you requested. We realize you have numerous options for procuring IT Products and appreciate that you contacted us. We will honor the prices on this quote through the expiration date identified above.

Given the rapid change in technology and product availability, Best Buy For Business cannot guarantee all the items on this quote will be available for purchase in the future. In that case, we will work together to make changes or modifications to your quote or order.

Thank you for partnering with Best Buy For Business on this opportunity.

The terms and conditions ("Terms") set forth herein constitute the agreement of Best Buy to sell to Client, and Client to purchase from Best Buy, products ("Products") and any associated services ("Services") and are binding on all Best Buy Business™ clients ("Clients"). Client accepts these Terms by making a purchase from or placing an order with Best Buy Business or shopping on the Best Buy Business website www.bestbuy.com/BusinessTerms ("Site"). For clarification, references to "You," "Client" or "customer" means business customer. Except in those



Pricing Proposal

Quotation #: 24364467 Created On: 1/11/2024 Valid Until: 2/21/2024

NC-County of Lee Schools

Inside Account Executive

Jenn Lloyd

106 Gordon St. ATTN: Rebel Hunter Sanford, NC 27330 United States

Phone: (919) 774-6226

Fax:

Email: jlloyd@lee.k12.nc.us

Ryan Doelger

290 Davidson Ave Somerset, NJ 08873 Phone: 732-584-8250

Fax:

Email: ryan_doelger@shi.com

All Prices are in US Dollar (USD)

	Product	Qty	Your Price	Total
1	LG 65UR340C9UD - 65" Diagonal Class UR340C Series LED-backlit LCD TV - digital signage - 4K UHD (2160p) 3840 x 2160 - HDR - navy blue, almost black LG Electronics - Part#: 65UR340C9UD Contract Name: Open Market Contract #: Open Market	20	\$675.86	\$13,517.20
2	Contract #: Open Market Fripp Lite Swivel/Tilt Corner Wall Mount for 37" to 70" TVs and Monitors - Flat/Curv Mounting kit (fasteners, wrench) for TV and monitor - steel - black - screen size: 37"-70" - wall-mountable Tripp Lite - Part#: DMWC3770M Contract Name: Open Market Contract #: Open Market	20	\$138.29	\$2,765.80
		- Manual A	Subtotal Shipping	\$16,283.00 \$1,701.97
			*Tax	\$1,258.95
			Total	\$19,243.92

*Tax is estimated. Invoice will include the full and final tax due.

Additional Comments

Hardware items on this quote may be updated to reflect changes due to industry wide constraints and fluctuations.

Please note, if Emergency Connectivity Funds (ECF) will be used to pay for all or part of this quote, please let us know as we will need to ensure compliance with the funding program.

Thank you for choosing SHI International Corp! The pricing offered on this quote proposal is valid through the expiration date set above. To ensure the best level of service, please provide End User Name, Phone Number, Email Address and applicable Contract Number when submitting a Purchase Order.

SHI International Corp. is 100% Minority Owned, Woman Owned Business. TAX ID# 22-3009648; DUNS# 61-1429481; CCR# 61-243957G; CAGE 1HTF0



IPEVO Inc] Re: Chat with Lee County Schools Jennifer Lloyd

message

PEVO Inc <cs@ipevo.com>
:eply-To: IPEVO Inc <cs@ipevo.com>
o: Jenn <jlloyd@lee.k12.nc.us>

Thu, Jan 11, 2024 at 1:03 PI

All new replies will be added above this line

Welcome to IPEVO Support

Your request (request No. 151935) has been updated.

Please find as follows our response to your question.

If you have any additional questions or comments, please reply to this email.

Jenn, Jan 11, 2024, 10:03 PST:

Chat started: 2024-01-11 05:59 PM UTC

(05:59:23 PM) Lee County Schools Jennifer Lloyd: Need a quote for IPEVO V4k Ultra HD document cameras. Website not working

will not let me submit under sales inquiry. (05:59:28 PM) *** Ashley joined the chat ***

(05:59:34 PM) Ashley: Thank you for contacting IPEVO

(05:59:38 PM) Lee County Schools Jennifer Lloyd: Quantity 5

(05:59:42 PM) Ashley: Hi Jennifer!

(05:59:53 PM) Lee County Schools Jennifer Lloyd: email illoyd@lee.k12.nc.us

(05:59:55 PM) Ashley: Please provide the billing & shipping address

(06:00:06 PM) Ashley: I can attach the quote here

(06:00:09 PM) Lee County Schools Jennifer Lloyd: do not have shipping address

(06:00:33 PM) Lee County Schools Jennifer Lloyd: use Lee County Schools, 106 Gordon St sanford, NC 27330

(06:00:50 PM) Ashley: Thanks. Please give me a moment to create a quote.

(06:00:53 PM) Lee County Schools Jennifer Lloyd: thanks

(06:01:30 PM) Ashley: Agent uploaded: E24VV9U_IPEVO-Estimate_LeeCountySchools.pdf

URL: https://v2uploads.zopim.io/1/v/S/1vSY19XydWRDaVs3augbeC1rlAKlKdmE/f679032aba0526bf80a8d4abf1bcd5

3b81964df5.pdf

Type: application/pdf

Size: 38242

(06:01:34 PM) Ashley: Please see the attached quote

(06:02:04 PM) Lee County Schools Jennifer Lloyd: got it thanks

(06:02:15 PM) Ashley: You're welcome!

(06:02:24 PM) Ashley: Can I help you with anything else today?

(06:02:33 PM) Lee County Schools Jennifer Lloyd: no appreciate it

(06:02:39 PM) Ashley: Thank you for chatting with us

(06:02:41 PM) Ashley: Have a great day!

This email is a service from IPEVO Inc.

IPEVO INC 440 N. Wolfe Road, Sunnyvale, CA 94085

Mailing address: IPEVO Inc, 4000 Pimlico Dr, Suite 114119 Pleasanton, CA 94588

(408)490-3085 sales@ipevo.com

Estimate

Date	Estimate No.
2024-01-11	E24VV9U
	Exp. Date
	2024-02-11

Account Mgr

	Bill To	
Lee County		
Jennifer Llo		
106 Gordor	ı Street,	
Sanford, NO	27330, USA	

Ship To

Lee County Schools
Jennifer Lloyd
106 Gordon Street,
Sanford, NC 27330, USA

P.O. Number

	FEDEX , GROUND			Joe Chang
Product No.	Product Name	Quantity	Unit Price	Amount
5-880-4-01-00	V4K USB Camera	5	\$ 99.00	\$ 495.00

Ship via

Remarks:

Valid for 31 days from the date of this quotation. Please email us at salesnc@ipevo.com
If you have any questions regarding this quote.

Bank: Bank of America SWIFT Code: B0FAU53N Routing No: 121000358 Account Number: 1168140688 Account Name: IPEVO, INC Bank Address: 20 Ranch Drive Milpitas, CA 95035

Subtotal	5 433.00
Shipping Fee	s 29.79
Tax (7.000%)	s 36.74
Total	s 561.53
1	

Subtotal

Accepted By

Accepted Date

495 00



LEE COUNTY SCHOOLS BID EVALUATION FORM

PROJECT INFORMATION:

3- HP Lascriet M209dw printer with 3- Replacement ink

IDENTIFIED VENDORS:

VENDOR NUMBER	VENDOR NAME	PRODUCT BRAND OFFERED
V1	Best Buy	HPM209dw W/Ink
V2	Zones	No ans.
V3	GOV. Connection	No ans.
V4		
V5		

EVALUATION CRITERIA (FOR AUGMENTING CURRENT ENVIRONMENT):

CRITERA EXPLANATIONS:

- HARDWARE COMPATIBILITY: Quoted equipment works seamlessly with existing equipment
- SUPPORT COMPATIBILITY: Quoted equipment can be supported in a manner equal to the existing equipment
- PRIOR EXPERIENCE: Previous experience with purchasing goods or services from vendor
- COST OF ELIGIBLE GOODS AND SERVICES: Price of eligible services or equipment
- COST OF INELIGIBLE GOODS AND SERVICES: Price of ineligible services or equipment

CRITERIA	V1	V2	V3		
PRICE (35 points)	35	6	Ø		
HARDWARE COMPATIBILITY (25 points)	25	0	0		
PRIOR EXPERIENCE (15 points)	15	Ø	Ø		
ADHERENCE TO RFP (15 points)	15	Ø	0		
SUPPORT COMPATIBILITY (10 points)	10	Ø	0		
TOTAL (100 points)	100	OX	0	, , , , , , , , , , , , , , , , , , ,	Process and the second second

Evaluator:	clennifor Hoyd ?	Rebecca 1	Arasu mer
Date:	1/12-/21		
Date:			



.ee County Schools Bulk order Quote due by 1/12/24 at 5pm

messages

enn Lloyd <jlloyd@lee.k12.nc.us>
o: Jenn Lloyd <jlloyd@lee.k12.nc.us>

Thu, Jan 11, 2024 at 12:51 PI

cc: Rebecca Measamer <rmeasamer@lee.k12.nc.us>, "Radil, Andy" <andy.radil@bestbuy.com>, Hassan Khan hassan.khan@zones.com>, Phil Bishop cc: Rebecca Measamer@lee.k12.nc.us>, "Radil, Andy" <andy.radil@bestbuy.com>, Hassan Khan hassan.khan@zones.com>, Phil Bishop cpnil.bishop@connection.com>

This order will be approved by the BOE and the order placed for 1 site. Pricing will need to be good through 2/20/24.

Can you please send me a quote for 3 - HP laserjet M209dw black and white printer with 3- replacement ink

Quote due by 1/12/24 at 5pm

Jenn Lloyd Lee County Schools, Technology Department 919-774-6226

:adil, Andy <Andy.Radil@bestbuy.com>
o: Jenn Lloyd <jlloyd@lee.k12.nc.us>

Thu, Jan 11, 2024 at 2:03 PI

Here you go!

Thank you!

Ref: # 244222074

Thank You!

Andy J. Radil

Sr. Account Manager, Best Buy Education

Office: 612-292-0468

Fax: 952-430-0276

Andy.Radil@Bestbuy.com

Learn how we can help at www.BestBuy.com/Education

For Post-Sales Support Email at EducationSupport@BestBuy.com

From: Jenn Lloyd <jlloyd@lee.k12.nc.us>
Sent: Thursday, January 11, 2024 11:52 AM
To: Jenn Lloyd <jlloyd@lee.k12.nc.us>

Subject: [CAUTION! EXTERNAL] Lee County Schools Bulk order Quote due by 1/12/24 at 5pm

Quote Details B Print

Quote Number: 244222074

Billing Address

Accounts Payable Lee County Schools PO BOX 1010 SANFORD, NC 27331 Phone 919-774-0000 **Shipping Address**

Accounts Payable Lee County Schools PO BOX 1010 SANFORD, NC 27331 Phone 919-774-0000

QUOTE TOTAL:

\$518.93

Qty	Product Description	Availability	Delivery Address	Price	Total Price
3	HP LaserJet M209dw - printer - B/W - laser Catalog Open Market Item BB21713901 Manufacturer 6GW62F#BGJ Standard Delivery	In Stock	Shipping Address Ship to my address	\$109.20	\$327.60
3	HP 134A - black - original - LaserJet - toner cartridge (W1340A) Catalog Open Market Item BB21692416 Manufacturer W1340A Standard Delivery	In Stock	Shipping Address Ship to my address	\$52.46	\$157.38
	Standard Delivery				
			Prod	uct Total:	\$484.98
				Tax:	\$33.95

Expiration Date

• 02/10/24

Shipping Method(s)

• (Instructions:)

Payment Type

• Business Advantage Account*********0866

Best Buy For Business is pleased to provide the quote you requested. We realize you have numerous options for procuring IT Products and appreciate that you contacted us. We will honor the prices on this quote through the expiration date identified above.

Given the rapid change in technology and product availability, Best Buy For Business cannot guarantee all the items on this quote will be available for purchase in the future. In that case, we will work together to make changes or modifications to your quote or order.

Thank you for partnering with Best Buy For Business on this opportunity.

The terms and conditions ("Terms") set forth herein constitute the agreement of Best Buy to sell to Client, and Client to purchase from Best Buy, products ("Products") and any associated services ("Services") and are binding on all Best Buy Business of Clients ("Clients"). Client accepts these Terms by making a purchase from or placing an order with Best Buy Business or shopping on the Best Buy Business website www.bestbuy.com/BusinessTerms ("Site"). For clarification, references to "You," "Client" or "customer" means business customer. Except in those instances where Best Buy Business and a Client enter into a separate written contract for the purchase of Products and/or Services providing for separate terms of sale, these Terms will apply. THESE TERMS ARE LIMITED TO THOSE CONTAINED HEREIN, BEST BUY HEREBY REJECTS



LEE COUNTY SCHOOLS BID EVALUATION FORM

PROJECT INFORMATION:

500 - Kensington USB Headphones IDENTIFIED VENDORS: Part # K97600 W ₺W

VENDOR NUMBER	VENDOR NAME	PRODUCT BRAND OFFERED
V1	Howard	Dav+ # K97600 WW
V2	CDW-G	Part # K97600WW part # K97600WW
V3	Insight	part # K97600 WW
V4		The second secon
V5		

EVALUATION CRITERIA (FOR AUGMENTING CURRENT ENVIRONMENT):

CRITERA EXPLANATIONS:

- HARDWARE COMPATIBILITY: Quoted equipment works seamlessly with existing equipment
- SUPPORT COMPATIBILITY: Quoted equipment can be supported in a manner equal to the existing equipment
- PRIOR EXPERIENCE: Previous experience with purchasing goods or services from vendor
- COST OF ELIGIBLE GOODS AND SERVICES: Price of eligible services or equipment
- COST OF INELIGIBLE GOODS AND SERVICES: Price of ineligible services or equipment

CRITERIA	V1	V2	V3			
PRICE (35 points)	25	30	35	1000		
HARDWARE COMPATIBILITY (25 points)	25	25	25			
PRIOR EXPERIENCE (15 points)	15	15	15			
ADHERENCE TO RFP (15 points)	15	15	15			
SUPPORT COMPATIBILITY (10 points)	10	10	10	500 M 150		
TOTAL (100 points)	90	95	100			and the state of t

Evaluator: _	Jennifer Lloyd	and	Rebecca Measamer
Date:	1/12/24		



Headphones

.ee County Schools Bulk order Quote due 1/11/24 at 5pm

message

enn Lloyd <jlloyd@lee.k12.nc.us>
o: Jenn Lloyd <jlloyd@lee.k12.nc.us>

Wed, Jan 10, 2024 at 11:48 Al

cc: Julie Larsen <jullars@cdwg.com>, "Latiolais, Mark" <Mark.Latiolais@insight.com>, kfunderburk@howard.com, Rebecca Measamer rmeasamer@lee.k12.nc.us>

These orders will be approved by the BOE and then ordered. Pricing will need to be good through 2/20/24.

2 SEPARATE QUOTES

500 - Kensington USB headphones, no mic item # K97600WW 55 - Anywhere USB headphones with mic item # AC-HPM-USB-MC

Quote due 1/11/24 at 5pm

Jenn Lloyd Lee County Schools, Technology Department 919-774-6226



of 2



INSIGHT PUBLIC SECTOR SLED 2701 E INSIGHT WAY CHANDLER AZ 85286-1930

Tel: 800-467-4448

SOLD-TO PARTY 10169408

LEE COUNTY SCHOOLS PO BOX 1010 SANFORD NC 27331-1010

SHIP-TO

LEE COUNTY SCHOOLS 106 GORDON ST SANFORD NC 27330-3960

-								
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Quotation Number: 0227008292 **Document Date** : 10-JAN-2024

PO Number

PO release:

Sales Rep : Mark Latiolais

Email : MARK.LATIOLAIS@INSIGHT.COM

Telephone

We deliver according to the following terms:

PURCHASE ORDER REQUIREMENTS:

Payment Terms

: Net 30 days

Ship Via

: Insight Assigned Carrier/Ground

Terms of Delivery

: FOB DESTINATION

Currency

: USD

Material	Material Description	Quantity	Unit Price	Extended Price
<u>K97600WW</u>	Kensington USB Hi-Fi Headphones - headphones OPEN MARKET	500	14.27	7,135.00
			Product Subtotal TAX	7,135.00 499.45
			Total	7,634.45

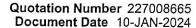
Quote Number:227008292	
Purchase Order Number:	
Authorized by/Title:	(please print)
Authorized Signature:	Date:
Additional signature, where required	
Authorized by/Title:	(please print)
Authorized Signature:	Date:

Thank you for choosing Insight. Please contact us with any questions or for additional information about Insight's complete IT solution offering.

Sincerely,

Mark Latiolais

MARK.LATIOLAIS@INSIGHT.COM







Insight Global Finance has a wide variety of flexible financing options and technology refresh solutions. Contact your Insight representative for an innovative approach to maximizing your technology and developing a strategy to manage your financial options.

This purchase is subject to Insight's online Terms of Sale unless you have a separate purchase agreement signed by you and Insight, in which case, that separate agreement will govern. Insight's online Terms of Sale can be found at the "terms-and-policies" link below.

SOFTWARE AND CLOUD SERVICES PURCHASES: If your purchase contains any software or cloud computing offerings ("Software and Cloud Offerings"), each offering will be subject to the applicable supplier's end user license and use terms ("Supplier Terms") made available by the supplier or which can be found at the "terms-and-policies" link below. By ordering, paying for, receiving or using Software and Cloud Offerings, you agree to be bound by and accept the Supplier Terms unless you and the applicable supplier have a separate agreement which governs. https://www.insight.com/terms-and-policies



Software

Services

IT Solutions

Brands

Research Hub

QUOTE CONFIRMATION

JENN LLOYD,

Thank you for considering CDW•G for your technology needs. The details of your quote are below. <u>If you are an eProcurement or single sign on customer, please log into your system to access the CDW site.</u> You can search for your quote to retrieve and transfer back into your system for processing.

For all other customers, click below to convert your quote to an order.

Convert Quote to Order

QUOTE #	QUOTE DATE	QUOTE REFERENCE	CUSTOMER #	GRAND TOTAL
NRWS561	1/11/2024	KENSINGTON USB HEADPHONES	2778420	\$8,292.50

QUOTE DETAILS

ITEM	QTY	CDW#	UNIT PRICE	EXT. PRICE
Kensington USB Hi-Fi Headphones - headphones	500	5151288	\$15.50	\$7,750.00

Mfg. Part#: K97600WW UNSPSC: 52161514 Contract: MARKET

\$7,750.00	SUBTOTAL
\$0.00	SHIPPING
\$542.50	SALES TAX
\$8,292.50	GRAND TOTAL

PURCHASER BILLING INFO

Billing Address: LEE COUNTY SCHOOLS ACCTS PAYABLE PO BOX 1010 SANFORD, NC 27331-1010 Phone: (919) 774-6226

Payment Terms: NET 30 Days-Govt/Ed

DELIVER TO

Shipping Address: LEE COUNTY SCHOOLS 106 GORDON ST SANFORD, NC 27330-3960 Shipping Method: UPS Ground (2- 3 Day)

Please remit payments to:

CDW Government 75 Remittance Drive Suite 1515 Chicago, IL 60675-1515



Sales Contact Info

Julie Larsen | 800.808.4239 | jullars@cdwg.com

LEASE OPTIONS

888.912.3151 general-601.399.5077 fax 888.323.3151 technical support

A Division of Howard Industries, Inc. www.Howard.com

Online Quotation

Quote No: **Customer Name:** MP 1358258.00 Jennifer Lloyd

Company Name: Quote Name:

Lee County School District Kensington USB headphones **Quote Date: Phone Number:** January 10, 2024 919-774-6226

Fax Number:

Item 1	
Category	

System Type:

Description Accessories

1:

Kensington USB Hi-Fi Headphones - Headphones - on-ear - wired - black

MPN: K97600WW

500

Qty.

\$16.80

\$8,400.00

Ext. Price

Sub-Total: \$8,400.00

Unit Price

Shipping & Handling: Included

Taxes:

\$ 588.00

Total for Item 1: \$8,988.00

This Quote will expire on February 09, 2024. Please include your Quote Number on your Purchase Order.

Holal for all pre-configured items

Sub-Total:

\$8,400.00

Shipping & Handling:

Included

Taxes:

\$ 588.00

Total:

\$8,988.00

Notes:

THIS QUOTATION IS EXPRESSLY LIMITED TO, AND EXPRESSLY MADE CONDITIONAL ON, PURCHASER'S ACCEPTANCE OF THE TERMS HEREIN AND ACCEPTANCE OF HOWARD'S GENERAL TERMS AND CONDITIONS OF SALE (LOCATED AT: https://www.howardcomputers.com/info/termsofsale.cfm), WHICH ARE FULLY ADOPTED AND INCORPORATED HEREIN BY REFERENCE. PURCHASER'S SUBMISSION OF A PURCHASE ORDER PURSUANT TO THIS QUOTATION CONSTITUTES PURCHASER'S ACCEPTANCE OF AND AGREEMENT WITH HOWARD'S GENERAL TERMS AND CONDTIONS OF SALE. HOWARD OBJECTS TO ANY DIFFERENT OR ADDITIONAL TERMS. A COPY OF THE ABOVE- REFERENCED GENERAL TERMS AND CONDITIONS OF SALE MAY ALSO BE OBTAINED BY CALLING 1-888-912-3151 OR EMAILING webmaster@howardcomputers.com.

Howard's product warranties, return policies and related information are also available at https://www.howardcomputers.com/support/warranties.cfm and https://www.howardcomputers.com/support/returnpolicy.cfm, or may be obtained by calling 1-888-912-3151 or emailing webmaster@howardcomputers.com.



LEE COUNTY SCHOOLS BID EVALUATION FORM

PROJECT INFORMATION:

55 - Anywhere USB headphones with mic DENTIFIED VENDORS: part # AC-HPM-USB-Mic

VENDOR NUMBER	VENDOR NAME	PRODUCT BRAND OFFERED
V1	Howard	part AC-HPM-USB-MIC
V2	Insight	Part Ac-HPM-USB-MC
V3	CDW-G	part AC-HPM-USB-MC
V4		
V5		

EVALUATION CRITERIA (FOR AUGMENTING CURRENT ENVIRONMENT):

CRITERA EXPLANATIONS:

- HARDWARE COMPATIBILITY: Quoted equipment works seamlessly with existing equipment
- SUPPORT COMPATIBILITY: Quoted equipment can be supported in a manner equal to the existing equipment
- PRIOR EXPERIENCE: Previous experience with purchasing goods or services from vendor
- COST OF ELIGIBLE GOODS AND SERVICES: Price of eligible services or equipment
- COST OF INELIGIBLE GOODS AND SERVICES: Price of ineligible services or equipment

CRITERIA	V1	V2	V3	
PRICE (35 points)	35	25	30	
HARDWARE COMPATIBILITY (25 points)	25	25	25	
PRIOR EXPERIENCE (15 points)	15	15	15	
ADHERENCE TO RFP (15 points)	15	15	15	
SUPPORT COMPATIBILITY (10 points)	10	10	10	
TOTAL (100 points)	100	90	95	

Evaluator:	Jenni	fer Lloya	land	Rebeca	Mersamer
Date:	1/2/24				

888.912.3151 general-601.399.5077 fax 888.323.3151 technical support

A Division of Howard Industries, Inc. www.Howard.com

Online Quotation

Quote No: **Customer Name:** MP 1358259.00

Jennifer Lloyd

Company Name: Quote Name:

Lee County School District

Anywhere Cart

Quote Date:

January 10, 2024 919-774-6226

Phone Number: Fax Number:

10.00	77,000	ella el	# 25.E	2
1 2	7	$\overline{}$	展	T.
R 4.	-	Αi	100	

Description

Category System Type: 1:

Accessories

Anywhere USB headphones with mic

MPN: AC-HPM-USB-MC

Qty.

55

Unit Price

Ext. Price

\$13.50 \$742.50

Sub-Total:

\$742.50

Shipping & Handling:

Included

Taxes:

\$ 51.98

Total for Item 1:

\$794.48

This Quote will expire on February 09, 2024. Please include your Quote Number on your Purchase Order.

Total for all pre-configured items

Sub-Total:

\$742.50

Shipping & Handling:

Included

Taxes:

\$ 51.98

Total:

\$794.48

Notes:

THIS QUOTATION IS EXPRESSLY LIMITED TO, AND EXPRESSLY MADE CONDITIONAL ON, PURCHASER'S ACCEPTANCE OF THE TERMS HEREIN AND ACCEPTANCE OF HOWARD'S GENERAL TERMS AND CONDITIONS OF SALE (LOCATED AT: https://www.howardcomputers.com/info/termsofsale.cfm), WHICH ARE FULLY ADOPTED AND INCORPORATED HEREIN BY REFERENCE. PURCHASER'S SUBMISSION OF A PURCHASE ORDER PURSUANT TO THIS QUOTATION CONSTITUTES PURCHASER'S ACCEPTANCE OF AND AGREEMENT WITH HOWARD'S GENERAL TERMS AND CONDITIONS OF SALE. HOWARD OBJECTS TO ANY DIFFERENT OR ADDITIONAL TERMS. A COPY OF THE ABOVE- REFERENCED GENERAL TERMS AND CONDITIONS OF SALE MAY ALSO BE OBTAINED BY CALLING 1-888-912-3151 OR EMAILING webmaster@howardcomputers.com.

Howard's product warranties, return policies and related information are also available at https://www.howardcomputers.com/support/warranties.cfm and https://www.howardcomputers.com/support/returnpolicy.cfm, or may be obtained by calling 1-888-912-3151 or emailing webmaster@howardcomputers.com.

888.912.3151 general-601.399.5077 fax 888.323.3151 technical support

A Division of Howard Industries, Inc. www.Howard.com

Online Quotation

Quote No: Customer Name: MP 1358259,00 Jennifer Lloyd

Lee County School District

Company Name: **Quote Name:**

Anywhere Cart

Quote Date: Phone Number: January 10, 2024 919-774-6226

Ext. Price

Fax Number:

Item 1 Category System Type:

Description

Accessories

1:

Anywhere USB headphones with mic

MPN: AC-HPM-USB-MC

Qty.

\$13.50

Taxes:

\$675.00

Sub-Total:

\$675.00

Shipping & Handling:

Unit Price

Included \$ 47.25

Total for Item 1:

\$722.25

This Quote will expire on February 09, 2024. Please include your Quote Number on your Purchase Order.

Total for all pre-configured fems

Sub-Total:

\$675.00

Shipping & Handling:

Included

Taxes:

\$ 47.25

Total:

\$722.25

Notes:

THIS QUOTATION IS EXPRESSLY LIMITED TO, AND EXPRESSLY MADE CONDITIONAL ON, PURCHASER'S ACCEPTANCE OF THE TERMS HEREIN AND ACCEPTANCE OF HOWARD'S GENERAL TERMS AND CONDITIONS OF SALE (LOCATED AT: https://www.howardcomputers.com/info/termsofsale.cfm), WHICH ARE FULLY ADOPTED AND INCORPORATED HEREIN BY REFERENCE. PURCHASER'S SUBMISSION OF A PURCHASE ORDER PURSUANT TO THIS QUOTATION CONSTITUTES PURCHASER'S ACCEPTANCE OF AND AGREEMENT WITH HOWARD'S GENERAL TERMS AND CONDTIONS OF SALE, HOWARD OBJECTS TO ANY DIFFERENT OR ADDITIONAL TERMS, A COPY OF THE ABOVE- REFERENCED GENERAL TERMS AND CONDITIONS OF SALE MAY ALSO BE OBTAINED BY CALLING 1-888-912-3151 OR EMAILING webmaster@howardcomputers.com.

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Thank you for choosing CDW. We have received your quote.

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QUOTE CONFIRMATION

JENN LLOYD,

Thank you for considering CDW•G for your technology needs. The details of your quote are below. <u>If</u> <u>you are an eProcurement or single sign on customer, please log into your system to access the CDW site.</u> You can search for your quote to retrieve and transfer back into your system for processing.

For all other customers, click below to convert your quote to an order.

Convert Quote to Order

QUOTE #	QUOTE DATE	QUOTE REFERENCE	CUSTOMER #	GRAND TOTAL
NRWS621	1/11/2024	ANYWHERE HEADPHONES W/MIC	2778420	\$882.75

QUOTE DETAILS

ITEM	QTY	CDW#	UNIT PRICE	EXT. PRICE
Anywhere Economical Headset with Boom Microphone & USB	55	6393380	\$15.00	\$825.00

Mfg. Part#: AC-HPM-USB-MC

Contract: MARKET

SUBTOTAL	\$825.00
SHIPPING	\$0.00
SALES TAX	\$57.75
PAND TOTAL	\$882.75

PURCHASER BILLING INFO

Billing Address: LEE COUNTY SCHOOLS ACCTS PAYABLE PO BOX 1010 SANFORD, NC 27331-1010 Phone: (919) 774-6226

Payment Terms: NET 30 Days-Govt/Ed

DELIVER TO

Shipping Address: LEE COUNTY SCHOOLS AARON FLEMING 106 GORDON ST SANFORD, NC 27330-3960 Shipping Method: DROP SHIP-GROUND

Please remit payments to:

CDW Government 75 Remittance Drive Suite 1515 Chicago, IL 60675-1515



Sales Contact Info

Julie Larsen | 800.808.4239 | jullars@cdwg.com





INSIGHT PUBLIC SECTOR SLED 2701 E INSIGHT WAY CHANDLER AZ 85286-1930

Tel: 800-467-4448

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LEE COUNTY SCHOOLS PO BOX 1010 SANFORD NC 27331-1010

SHIP-TO

LEE COUNTY SCHOOLS 106 GORDON ST SANFORD NC 27330-3960

O	uc	ta	ti	n	n
w	u	, La	LI	v	

Quotation Number: 0227008665 **Document Date** : 10-JAN-2024

PO Number

PO release:

Sales Rep : Mark Latiolais

Email : MARK.LATIOLAIS@INSIGHT.COM

Telephone

We deliver according to the following terms:

Payment Terms

Ship Via

: Insight Assigned Carrier/Ground

Terms of Delivery

: FOB DESTINATION

Currency

: USD

This quotation contains freight and tax estimates that are subject to change by Insight.

Material	Material Description	Quantity	Unit Price	Extended Price
AC-HPM-USB-MC	ANYWHERE CART:ECONOMICAL HEADSET WITH OPEN MARKET	55	16.99	934.45
			Product Subtotal	934.45
			TAX	65.41
			Total	999.86

٢	UK	CH	45E	OKD	= 12 1	KEW	UIK	LIVIL	NI	5:

Quote Number: 227008665

Purchase Order Number:				
Authorized by/Title:	(please print)			
Authorized Signature:	Date:			
Additional signature, where required				
Authorized by/Title:	(please print)			
Authorized Signature:	Date:			

Thank you for choosing Insight. Please contact us with any questions or for additional information about Insight's complete IT solution offering.

Sincerely,

Mark Latiolais

MARK.LATIOLAIS@INSIGHT.COM





2024-2025 E-Rate Category 1 Board Update January, 2024

2024-2025 E-Rate Cat 1								
New Contract (1st Year)	Contract Signed	Vendor	Monthly Cost	Yearly Cost	E-Rate 90%	State 10%	Lee County Schools	
5 Year 7/1/2024-6/30/2029 w/ 4 1-Yr optional extensions	3/14/2023	Conterra	\$16,912.00	\$202,944.00	\$182,649.60	\$20,294.40	\$0.00	
BUS Wi-Fi	470 Release Date	Bid Deadline	Monthly Cost	Yearly Cost	E-Rate 90%	State 10%	Lee County Schools 10%	
Bus Wi-Fi Service	1/6/2024	1/24/2024				\$0.00		
Bus Wi-Fi 36 mth Licensing	1/6/2024	1/24/2024				\$0.00		

ECF funding ended 12/31/2023. LCS is paying for bus service from 1/1/2024 through 6/30/2024. This was previously board approved for a yearly amount of \$81,192.38.

Equipment Install April/May 2022	\$ 217,607.85	100% Funded by ECF
Service Start Date 9/1/2022 - 2/28/2023 (6 Months)	\$ 40,596.19	100% Funded by ECF
Service Start Date 3/1/2023-6/30/2023 (4 Months)	\$ 27,064.13	LCSS 2022-2023 PO
Service Start Date 7/1/2023 - 6/30/2024 (12 Months)	\$ 81,192.38	LCSS 2023-2024 PO
		(Each following year)

E-Rate made an announcement that bus hardware and service will be covered under E-Rate Cat 1. LCS has a 90% Cat 1 E-Rate discount. LCS will have to pay the remaining 10%. Bus Wi-Fi service and licensing has been released through E-Rate for bids. Service start date 7/1/2024 through 6/30/2025. Bid due date is 1/24/2024.

Page 12 of 13

ATTACHMENT A

The deployment of the Services set forth herein are subject to but not limited to the procurement of leases, licenses, easements, right of ways, pole attachments, and other ancillary requirements. In the event CONTERRA is not able, through no fault of its own, to procure the ancillary requirements in a commercially reasonable time and manner, CONTERRA reserves the right to modify the network as CONTERRA deems appropriate.

Lee County Board of Education

		Service Loca	ations				
Site Name	Address	City	State	Zip	Bandwidth	Non- Recurring Charge	Monthly Service Fee
Heins Educational Building (District HUB)	106 Gordon Street	Sanford	NC	27330	4 X 10 Gbps Aggregation	\$0.00	\$3,249.00
Benjamin T Bullock Elementary	1410 McNeil Road	Sanford	NC	27330	1 Gbps	\$0.00	\$595.00
Bragg Street Academy	504 Bragg Street	Sanford	NC	27330	1 Gbps	\$0.00	\$595.00
Broadway Elementary	307 South Main Street	Broadway	NC	27505	1 Gbps	\$0.00	\$595.00
BUS Garage	416 Cox Maddox Road	Sanford	NC	27332	1 Gbps	\$0.00	\$595.00
Deep River Elementary	4000 Deep River Road	Sanford	NC	27330	1 Gbps	\$0.00	\$595.00
East Lee Middle	1337 Broadway Road	Sanford	NC	27330	10 Gbps	\$0.00	\$988.00
Floyd L. Knight Children's Ctr	607 McIntosh Street	Sanford	NC I	27330	1 Gbps	\$0.00	\$595.00
Greenwood Elementary	1127 Greenwood Road	Sanford	NC	27332	1 Gbps	\$0.00	\$595.00
J Glenn Edwards Elementary	3115 Cemetery Road	Sanford	NC I	27332	1 Gbps	\$0.00	\$595.00
J R Ingram Junior Elementary	3309 Wicker Street	Sanford	NC I	27330	1 Gbps	\$0.00	\$595.00
Lee County High	1708 Nash Street	Sanford	NC	27330	10 Gbps	\$0.00	\$988.00
Lee Early College	1105 Kelly Drive	Sanford	NC I	27330	10 Gbps	\$0.00	\$988.00
San Lee Middle	2309 Tramway Road	Sanford	NC	27332	10 Gbps	\$0.00	\$988.00
Southern Lee High	2301 Tramway Road	Sanford	NC	27332	10 Gbps	\$0.00	\$988.00
Tramway Elementary	360 Center Church Road	Sanford	NC	27330	1 Gbps	\$0.00	\$595.00
Warren Williams Elementary	901 Lawrence Street	Sanford	NC	27330	1 Gbps	\$0.00	\$595.00
West Lee County Middle	3301 Wicker Street	Sanford	NC	27330	10 Gbps	\$0.00	\$988.00
W.B. Wicker Elementary	900 South Vance Street	Sanford	NC	27330	1 Gbps	\$0.00	\$595,00
ESL Intake Center and Maintenance Buildings	2000 Nash Street	Sanford	NG	27330	1 Gbps	\$0.00	\$595.00
20 sites	A CONTRACTOR OF THE CONTRACTOR	TOTAL PROPERTY.			Total Charges	\$0.00	\$16,912.00

"Unless CUSTOMER has provided CONTERRA with a valid tax exemption certificate, CUSTOMER shall be responsible for all applicable taxes and fees as set forth in the Agreement. These taxes and fees are in addition to the Monthly Service Fee and should be included as a separate line item when CUSTOMER submits their 471 Funding Request. Please note that rates for taxes and fees are outside the control of CONTERRA and may change from time to time.



Request for Proposal

E-Rate BUS WI-FI

E-Rate 470 #240011713

Basic Information

• Number of Buses: 135

- Current Equipment: Cradle Point 900 Ruggedized Mobile Routers, purchased
- Cradle Point Management Licenses: Current management licensing end date 6/30/2023; 36 month contract starts and end dates 7/1/2024-6/30/2025; 7/1/2025-6/30/2026; 7/1/2026-6/30/2027.

Objective Lee County Schools (LCS) invites proposals for a 36-month contract for Cradle Point (or equivalent) licenses, utilizing existing equipment, for bus routes across Lee County, North Carolina.

- **1. Specifications** LCS requires a BUS WI-FI management licensing solution for 135 Cradle Point 900 Ruggedized Mobile Routers, with flexibility to adjust quantities as needed. The routers will be managed by Lee County Schools WAN Engineer.
 - 1.1. Contracts contingent on E-Rate funding and Board of Education approval.

2. E-Rate Compliance

- **2.1.** Full compliance with USAC requirements.
- 2.2. Adherence to FCC's Lowest Corresponding Price rules.
- 2.3. Valid SPIN provision and compliance filing. SPIN Info
- 2.4. Clear designation of E-Rate eligible and non-eligible items.

- **2.5.** Prompt response to E-Rate inquiries.
- 2.6. Utilization of the SPI reimbursement method.

3. Reference and Experience

3.1. Provide three references for similar-sized K-12/higher education environments (use provided table).

4. Mandatory Bid Requirements

- **4.1.** Detailed management licensing plan costs, including taxes and fees.
- **4.2.** Willingness to provide discounted bills and use SPI payment method.
- **4.3.** Disclosure of any ineligible charges.
- 4.4. Provision of the Vendor's E-rate SPIN.
- **4.5.** Sample contract or service order required by the Vendor.

5. Evaluations

5.1. The Board reserves the right to reject any bids and award contracts as deemed fit.

6. Proposal Submission

Include company name and licensing in the file name.

Upload proposals by February 5th, 2024, 2:00 PM: Submit Here

Confirmation of submission will be provided.

Requests for Information

Deadline: January 24th, 2024, 2:00 PM: RFI Form

Note: No phone calls for general information.

Thank you in advance for your proposal.



Request for Proposal

E-Rate BUS WI-FI

E-Rate 470 #240010581

Basic Information

Number of Buses: 135

Current Equipment: Cradle Point 900 Ruggedized Mobile Routers, purchased

Cradle Point Management Licenses

Objective Lee County Schools (LCS) invites proposals for a 36-month contract for 5G Wi-Fi service utilizing existing equipment, for bus routes across Lee County, North Carolina.

- **1. Specifications** LCS requires a BUS WI-FI solution for 135 buses, with flexibility to adjust quantities as needed.
 - **1.1.** Bus routes: <u>Lee County Bus Routes</u>
 - 1.2. Unlimited data plan.
 - **1.3.** Capability to support 55-70 students per bus.
 - 1.4. CIPA-compliant internet filtering will be enforced by Lee County Schools
 - 1.5. Contracts contingent on E-Rate funding and Board of Education approval.

2. E-Rate Compliance

- **2.1.** Full compliance with USAC requirements.
- 2.2. Adherence to FCC's Lowest Corresponding Price rules.
- 2.3. Valid SPIN provision and compliance filing. SPIN Info
- **2.4.** Clear designation of E-Rate eligible and non-eligible items.

- **2.5.** Prompt response to E-Rate inquiries.
- 2.6. Utilization of the SPI reimbursement method.

3. Reference and Experience

3.1. Provide three references for similar-sized K-12/higher education environments (use provided table).

4. Mandatory Bid Requirements

- 4.1. Coverage details of bus routes, including signal strength and dead zones.
- **4.2.** Detailed service plan costs, including taxes and fees.
- 4.3. Willingness to provide discounted bills and use SPI payment method.
- **4.4.** Disclosure of any ineligible charges.
- 4.5. Provision of the Vendor's E-rate SPIN.
- **4.6.** Sample contract or service order required by the Vendor.

5. Evaluations

5.1. The Board reserves the right to reject any bids and award contracts as deemed fit.

6. Proposal Submission

Include company name in the file name.

Upload proposals by February 5th, 2024, 2:00 PM: Submit Here

Confirmation of submission will be provided.

Requests for Information

Deadline: January 24, 2024, 2:00 PM: RFI Form

Note: No phone calls for general information.

Thank you in advance for your proposal.



2024-2025 E-Rate Category 2 Board Update January, 2024

The filing window for E-Rate 471 opened at 12:00 pm on January 17, 2024. Bidding has concluded, and vendors have been chosen for the listed equipment/services. Typically, funding commitments are received during the summer.

2024-2025 E-Rate Cat 2								
Year 4 of the E-Rate 5 Year Cycle - Remaining Budget		\$1,059,510.73						
2024-2025 Mini-Bids	Awarded Vendor	2024 Filings	One-Time Cost	E-Rate 85%	State 15%	LCS		
UPSs	CNIC	\$321,064.36	\$321,064.36	\$272,904.71	\$48,159.65	\$0.00		
Switching	CDW-G	\$110,266.52	\$110,266.52	\$93,726.54	\$16,539.98	\$0.00		
Extreme Licensing & Support (5-Year)	CDW-G	\$286,837.04	\$286,837.04	\$243,811.48	\$43,025.5 <mark>6</mark>	\$0.00		
APs	CDW-G	\$111,054.00	\$111,054.00	\$94,395.90	\$16,658.10	\$0.00		
Cabling	Encore	\$22,420.46	\$22,420.46	\$19,057.39	\$3,363.07	\$0.00		
Year 5 Budget (2025-2026)		\$207,868.35	\$851,642.38	\$723,896.02	\$127,746.3 6	\$0.00		

This represents our first submission for Extreme licensing and support. LCS has been making an annual payment of \$49,696.00. We have applied for a 5-year period of licensing and support, covering all Extreme equipment, both new and older. The funding distribution is as follows: 85% covered by E-Rate, 15% by the state, and 0% by LCS.

Extreme Licensing & Support 2023-2024

QUOTE CONFIRMATION



DEAR JENN LLOYD,

Thank you for considering CDW•G LLC for your computing needs. The details of your quote are below. Click here to convert your quote to an order.

QUOTE #	QUOTE DATE	QUOTE REFERENCE	CUSTOMER #	GRAND TOTAL
MGBN313	7/8/2021	EXTREME CUSTOM RENEWAL	2778420	\$49,969.00

QUOTE DETAILS					
ITEM	QTY	CDW#	UNIT PRICE	EXT. PRICE	
EXTREME CUSTOM RENEWAL	1	6616087	\$46,700.00	\$46,700.00	
Mfg. Part#: EXT-R002214881					
Electronic distribution - NO MEDIA					
Contract: NC eProcurement System					

PURCHASER BILLING INFO	SUBTOTAL	\$46,700.00		
Billing Address:	SHIPPING \$0 SALES TAX \$3,269 GRAND TOTAL \$49,969			
LEE COUNTY SCHOOLS ACCTS PAYABLE				
PO BOX 1010 SANFORD, NC 27331-1010 Phone: (919) 774-6226 Payment Terms: NET 30 Days-Govt/Ed				
DELIVER TO	Please remit payments to:			
Shipping Address: LEE COUNTY SCHOOLS 106 GORDON ST SANFORD, NC 27330-3960 Shipping Method: ELECTRONIC DISTRIBUTION	CDW Government 75 Remittance Drive Suite 1515 Chicago, IL 60675-1515			

Need /	seletance? CD	W•G LLC SALES CONTACT	INFORMATION	
Julie Larsen	Ī	800.808.4239	l	jullars@cdwg.com

LEASE OPTIONS			
FMV TOTAL	FMV LEASE OPTION	BO TOTAL	BO LEASE OPTION
\$46,700.00	\$1,263.24/Month	\$45,700.00	\$1,455.64/Month

Monthly payment based on 36 month lease. Other terms and options are available. Contact your Account Manager for details. Payment quoted is subject to change.

Why finance?

- Lower Upfront Costs. Get the products you need without impacting cash flow. Preserve your working capital and existing credit line.
- Flexible Payment Terms. 100% financing with no money down, payment deferrals and payment schedules that match your company's business cycles.
- Predictable, Low Monthly Payments. Pay over time. Lease payments are fixed and can be tailored to your budget levels or revenue streams.
- Technology Refresh. Keep current technology with minimal financial impact or risk. Add-on or upgrade during the lease term and choose to return or purchase the equipment at end of lease.



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QUOTE CONFIRMATION

JENN LLOYD,

Thank you for considering CDW•G for your technology needs. The details of your quote are below. If you are an eProcurement or single sign on customer, please log into your system to access the CDW site. You can search for your quote to retrieve and transfer back into your system for processing.

For all other customers, click below to convert your quote to an order.

Convert Quote to Order

QUOTE #	QUOTE DATE	QUOTE REFERENCE	CUSTOMER #	GRAND TOTAL
NQHT704	11/8/2023	ERATE 2024 EXTREME	2778420	\$286,837.04

QUOTE DETAILS

ITEM	QTY	CDW#	UNIT PRICE	EXT. PRICE
EXTREME CUST SUP RENEWAL	1	7697202	\$268,072.00	\$268,072.00

Mfg. Part#: EXT-RENEWAL-R005181754 Electronic distribution - NO MEDIA

Contract: MARKET

\$268,072.00 SUBTOTAL \$0.00 SHIPPING \$18,765.04 SALES TAX \$286,837.04

GRAND TOTAL

PURCHASER BILLING INFO

Billing Address: LEE COUNTY SCHOOLS ACCTS PAYABLE PO BOX 1010 SANFORD, NC 27331-1010 Phone: (919) 774-6226

Payment Terms: ERATE QUOTES ONLY

DELIVER TO

Shipping Address: LEE COUNTY SCHOOLS 106 GORDON ST SANFORD, NC 27330-3960 Shipping Method: ELECTRONIC DISTRIBUTION

Please remit payments to:

CDW Government 75 Remittance Drive Suite 1515 Chicago, IL 60675-1515



Sales Contact Info

Julie Larsen | 800.808.4239 | juliars@cdwg.com



Software

Services

IT Solutions

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QUOTE CONFIRMATION

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For all other customers, click below to convert your quote to an order.

Convert Quote to Order

QUOTE #	QUOTE DATE	QUOTE REFERENCE	CUSTOMER	# GRAI	ND TOTAL	
NPWS028	10/26/2023	ERATE 2024	2778420	\$11	\$111,054.00	
QUOTE DETAILS						
ITEM		QTY	CDW#	UNIT PRICE	EXT. PRICE	
Extreme Networks Extr point Bluetooth,	emeWireless AP410C - wire	eless access 200	6491021	\$361.00	\$72,200.00	
Mfg. Part#: AP410C-FCC						
Contract: MARKET						
Extreme Networks Extr subscription license	emeCloud IQ Pilot - Right-T	'o-Use 200	5925164	\$169.00	\$33,800.00	
Mfg. Part#: XCIQ-PT0-C-E	EW-5YR-K12					

Mfg. Part#: XCIQ-PT0-C-EW-5YR-K12 Electronic distribution - NO MEDIA

Contract: MARKET

These services are considered Third Party Services, and this purchase is subject to CDW's Third Party Cloud Services Terms and Conditions, unless you have a written agreement with CDW covering your purchase of products and services, in which case this purchase is subject to such other written agreement.

The third-party Service Provider will provide these services directly to you pursuant to the Service Provider's standard terms and conditions or such other terms as agreed upon directly between you and the Service Provider. The Service Provider, not CDW, will be responsible to you for delivery and performance of these services. Except as otherwise set forth in the Service Provider's agreement, these services are non-cancellable, and all fees are non-refundable.

 SUBTOTAL
 \$106,000.00

 SHIPPING
 \$0.00

 SALES TAX
 \$5,054.00

 GRAND TOTAL
 \$111,054.00

PURCHASER BILLING INFO

Billing Address: LEE COUNTY SCHOOLS ACCTS PAYABLE PO BOX 1010 SANFORD, NC 27331-1010 Phone: (919) 774-6226

Payment Terms: ERATE QUOTES ONLY

DELIVER TO

Shipping Address: LEE COUNTY SCHOOLS 106 GORDON ST SANFORD, NC 27330-3960 Shipping Method: DROP SHIP-GROUND



Software

Services

IT Solutions

Brands

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QUOTE CONFIRMATION

JENN LLOYD,

Thank you for considering CDW•G for your technology needs. The details of your quote are below. <u>If</u> you are an eProcurement or single sign on customer, please log into your system to access the CDW site. You can search for your quote to retrieve and transfer back into your system for processing.

For all other customers, click below to convert your quote to an order.

Convert Quote to Order

QUOTE # NQCW280	QUOTE DATE 11/2/2023	QUOTE REFEI		CUSTOMER # 2778420		ND TOTAL 0,266.52
QUOTE DETAILS						
ITEM		Q	TY	CDW#	UNIT PRICE	EXT. PRICE
Extreme Networks 5520 24- Mfg. Part#: 5520-24W Contract: MARKET	Port 802.3bt 90W PoE Sv	witch	6	6256268	\$2,162.00	\$12,972.00
Extreme Networks - power s Mfg. Part#: 10941 UNSPSC: 39121004 Contract: MARKET	supply - redundant - 1100	0 Watt	12	3440917	\$544.00	\$6,528.00
Extreme Networks power ca Mfg. Part#: 10099 UNSPSC: 26121636 Contract: MARKET	<u>błe</u>	2	26	3533481	\$22.00	\$572.00
Extreme Networks Versatile expansion module - Gi Mfg. Part#: 5520-VIM-4XE Contract: MARKET	Interface Module VIM-4)	KE - 1	1	6318352	\$750.00	\$8,250.00
Extreme Networks 5520 48-i Mfg. Part#: 5520-48W Contract: MARKET	Port 802.3bt 90W PoE Sw	vitch !	5	6249265	\$3,562.00	\$17,810.00
Extreme Networks - power s Mfg. Part#: XN-ACPWR-1100W- Contract: MARKET		<u>Vatt</u> 1	0	6583649	\$544.00	\$5,440.00
Extreme Networks ExtremeS ports - managed -	witching X435-8P-4S - s	witch - 8 4	0	5935187	\$410.00	\$16,400.00

Mfg. Part#: X435-8P-4S Contract: MARKET

QUOTE DETAILS (CONT.)				
Extreme Networks - power cable - NEMA 5-15 to IEC 60320 C13 Mfg. Part#: 10061	40	1897798	\$10.50	\$420.00
UNSPSC: 26121604 Contract: MARKET				
Extreme Networks ExtremeCloud IQ Pilot - Right-To-Use subscription license Mfg. Part#: XCIQ-PT055-C-EW-5YK12	13	6321607	\$716.00	\$9,308.00
Electronic distribution - NO MEDIA Contract: MARKET				
Extreme Networks ExtremeCloud IQ Pilot - Right-To-Use subscription license	40	6340802	\$169.00	\$6,760.00
Mfg. Part#: XCIQ-PT1-C-EW-5YR-K12 Electronic distribution - NO MEDIA Contract: MARKET				
Extreme Networks ExtremeWorks Software and TAC - technical support - 1 year Mfg. Part#: 97000-X435-8P-4S	40	6029286	\$193.00	\$7,720.00
Electronic distribution - NO MEDIA Contract: MARKET				
Extreme Networks 5520 Series 24-Port Fiber Switch Mfg. Part#: 5520-24X Contract: MARKET	2	6328554	\$5,324.00	\$10,648.00
Extreme Networks - power supply - 350 Watt Mfg. Part#: XN-ACPWR-350W-FB	4	6584962	\$319.00	\$1,276.00

These services are considered Third Party Services, and this purchase is subject to CDW's Third Party Cloud Services Terms and Conditions, unless you have a written agreement with CDW covering your purchase of products and services, in which case this purchase is subject to such other written agreement.

The third-party Service Provider will provide these services directly to you pursuant to the Service Provider's standard terms and conditions or such other terms as agreed upon directly between you and the Service Provider. The Service Provider, not CDW, will be responsible to you for delivery and performance of these services. Except as otherwise set forth in the Service Provider's agreement, these services are non-cancellable, and all fees are non-refundable.

SUBTOTAL	\$104,104.00
SHIPPING	\$0.00
SALES TAX	\$6,162.52
GRAND TOTAL	\$110,266.52

PURCHASER BILLING INFO

Contract: MARKET

Billing Address: LEE COUNTY SCHOOLS ACCTS PAYABLE PO BOX 1010 SANFORD, NC 27331-1010 Phone: (919) 774-6226

Payment Terms: ERATE QUOTES ONLY

DELIVER TO

Shipping Address: LEE COUNTY SCHOOLS 106 GORDON ST SANFORD, NC 27330-3960 Shipping Method: DROP SHIP-GROUND

Please remit payments to:

Encore Technology Group – Spin 143037152 NC20C2-66 CABLE-ENCORE NCDPI

School Site	Product ID	Quantity	<u>Customer Description</u>	L	Init Price	Ex	tended Price
Lee County HS	4G2404/6-6-10G-BT		CAT 6A CMP	\$		\$	1,320.00
200 000,	6110G-RL6-LEV		CAT 6A Jack	\$		\$	238.60
	49255-H24		CAT 6 24 Port Patch Panel Field Loadable	\$		\$	106.82
	41089-2IP		Dual Port Biscuit Box	\$	2.61	\$	13.05
	189755	1	Velcro Roll 1/2" x 75'	\$	21.59	\$	21.59
	18482		Labels 3/8	\$	19.32	\$	19.32
	Labor - Fixed		Encore Engineering Services	\$	5,075.00	\$	5,075.00
Southern Lee HS	6110G-RL6-LEV		CAT 6A Jack	\$		\$	23.86
	41089-1WP	1	Single Port Biscuit Box	\$	2.39	\$	2.39
	Labor - Fixed	1	Encore Engineering Services	\$	164.50	\$	164.50
ST 5 // /	462404/6 6 406 PT	1000	CAT CA CAAD	ć	0.66	\$	660.00
BT Bullock	4G2404/6-6-10G-BT		CAT 6A CMP	\$ \$	11.93	\$	47.72
	6110G-RL6-LEV		CAT 6A Jack CAT 6 24 Port Patch Panel Field Loadable	۶ \$	53.41	\$	53.41
	49255-H24			\$ \$	2.61	\$	2.61
	41089-2IP		Dual Port Biscuit Box	۶ \$	882.50	\$	882.50
	Labor - Fixed	1	Encore Engineering Services	Þ	882.50	Ş	002.50
JR Ingram	1/2-EMT	5	EMT 1/2in	\$	6.81	\$	34.05
3	21220		EMT Coupler 1/2in	\$	0.53	\$	1.59
	26270		EMT Connector 1/2in	\$	0.91	\$	1.82
	200		One Hole Strap 1/2in	\$	0.28	\$	1.40
	521711234EW-25R		4 Square Back Box Standard	\$	3.88	\$	7.76
	52C1-50R		4 Square Cover Plate	\$	1.11	\$	2.22
	012E88-33131-A3		12 Strand Armored Plen SM	\$	1.49	\$	223.50
	95-200-99	26	LC SM Connector	\$	18.47	\$	480.22
	RTC1U-3APB	1	12 Port Fiber Enclosure	\$	185.23	\$	185.23
	6112SMDLC	2	12 Port Bulk Head SM LC	\$	76.14	\$	152.28
	Labor - Fixed	1	Encore Engineering Services	\$	4,400.00	\$	4,400.00
JG Edwards	1/2-EMT	10	EMT 1/2in	\$	6.81	\$	68.10
	21220	10	EMT Coupler 1/2in	\$	0.53	\$	5.30
	26270	4	EMT Connector 1/2in	\$	0.91	\$	3.64
	200	10	One Hole Strap 1/2in	\$	0.28	\$	2.80
	521711234EW-25R	4	4 Square Back Box Standard	\$	3.88	\$	15.52
	52C1-50R	4	4 Square Cover Plate	\$	1.11	\$	4.44
	012E88-33131-A3	300	12 Strand Armored Plen SM	\$	1.49	\$	447.00
	95-200-99	52	LC SM Connector	\$	18.47	\$	960.44
	RTC1U-3APB	2	12 Port Fiber Enclosure	\$	185.23	\$	370.46
	6112SMDLC	4	12 Port Bulk Head SM LC	\$	76.14	\$	304.56
	Labor - Fixed	1	Encore Engineering Services	\$	4,650.00	\$	4,650.00
			_			<u> </u>	1 100 70
			Tax			\$	1,466.76
			Total with Tax			\$	22,420.46

E-Rate FY-2024 Quote || UPS Equipment w/ Installation

Service Provider: CNIC, Inc CNIC, Inc. SPIN # 143024151

Date: 11/1/2023

Contract Number: 40-RQ22294323 / NC20C2-49

Funding Year: 7/1/2024

Applicant: Lee County Schools

Site Name: Lee County Schools

Billed Entity No: 126840

Form 470 Application No: 200000716

Form 471 Application No:

ltem	Classification	Manufacturer	Part Number	Description	ι	Init Price	Quantity	Extended Price	Eligibile Percent	Eligible Amount		Ineligible Amount	S&H	S&H Per Iten
1	IC	Eaton	9PX6K-L	Eaton 9PX 6kVA Lithium-ion UPS, 3U Rack/Tower, 5400W, 208V, In: 10ft L6-30P or Hardwire, Out: (2) L6-30R, (2) L6-20R, Hardwire,	\$	8,209.09	17	\$ 139,554.53	100%	\$ 139,554.53	\$	¥		
2	IC	Eaton	9PXTFMR5	Eaton 9PX stepdown transformer, Rack/tower configuration, 3U. L6-30P input, 3 ft cord, (18) 5-20R outputs	\$	797.49	17	\$ 13,557.33	100%	\$ 13,557.33				
3	IC	Eaton	9PXEBM192RT-L	Eaton 9PX lithium ion extended battery module (EBM), 2U, used with 9PX6K-L	5	3,973.29	34	\$ 135,091.86	100%	\$ 135,091.86	s			
4	IC	Eaton	BINTSYS (9PX caster kit)	Eaton battery integration system with casters	\$	429.79	17	\$ 7,306.43	100%	\$ 7.306.43	\$			

	Project Cost Summary Total Cost	Eligible Amount ineligible Amo
Shipping charges only applicable on hardware. Pricing quoted in response to this bid request will be contingent upon U. S. goverenment imposed tariffs on certain foreign sourced goods. Accordingly, the	Equipment: \$ 295,510.15	\$ 295,510.15 \$ -
prices quoted may vary proportionately with the imposition and implementation of government imposed tariffs. Material delivery lead times are subject to manufacturer process, in general up to 3 weeks for	Shipping: \$ -	s - s -
standard orders and 6 weeks for special orders. Installation Schedules of material are set independently and may not coincide with delivery of materials. Project scheduling will be prioritized by USAC funding commitment	Technical Labor: \$ 4,550.00 Sub-total \$ 300,060.15	\$ 4,550.00 \$ -
depend upon crew availability.	NC Tax 7.00% \$ 21,004.21	\$ 21,004.21 \$ -
	Project Total: \$ 321,064,36	\$ 321,064.36 \$ -

LOCAL SHARE and INELIGIBLE INFORMATION

TOTAL APPLICANT RESPONSIBILITY(APPLICANT SHARE + INELIGIBLE

\$ 64,212.87

CNIC, Inc. 2200 Crown Centre Dr. Suite C, Charlotte NC 28227 Office: 704.344.0090 - Fax: 704.374.0069 - www.cnic-inc.com



Quote for

Lee County Schools-NC



Dear Stacie,

As the industry continues to evolve, we want to ensure your district has the reliable, cloud-based solutions and consultative support you need to focus on what's important – ensuring students are healthy, safe and ready to learn.

By partnering with LINQ, you have the opportunity to work with a team of industry veterans and former school administrators who are committed to supporting you every step of the way. You will gain exclusive access to the industry's only full suite of integrated solutions that help improve your operational efficiency, optimize financial performance, and increase participation from students to states across nutrition, digital, and finance.

In addition to the industry's most innovative and time-saving tools, LINQ's dedicated team is committed to providing you with the peace of mind your nutrition program needs to succeed.

With your support, we truly can be stronger together.

Sincerely, Bryan Jones CEO | LINQ



EMS LINQ

Connecting the K-12 Community

2528 Independence Blvd Suite 200 Wilmington, NC 28412

Phone: 800.541.8999 Fax: 910.799.5427 Email: lkirkham@linq.com

 Quote #:
 Q-109361-3

 Start Date:
 4/1/2024

 End Date:
 3/31/2025

 Expires On:
 1/26/2024

Customer Contact Stacie Eggers 919-774-6226, ext. 7258 seggers@lee.k12.nc.us

Superintendent:

Bill ToLee County Schools
106 Gordon St
Sanford, North Carolina 27330

SALESPERSON	EMAIL	SERVICE PERIOD	PAYMENT METHOD
Laura Kirkham	lkirkham@linq.com	12 months	Net 30

Terms & Conditions

Year 1

(April 1, 2024 - March 31, 2025)

This grouping of products represents your first invoice. It includes your first year subscription products as well as any one-time fees.

QTY	PRODUCT	DESCRIPTION	UNIT PRICE	NET PRICE	EXTENDED
1	LINQ NC - Human Resources	LINQ NC ERP add-on product. Optional in bundle.	\$19,606.00	\$19,606.00	\$19,606.00
20	Remote Training - NC ERP - Hourly	Remote Training - ERP - Hourly	\$200.00	\$200.00	\$4,000.00
	.	•		Subtotal:	\$23,606.00

Tax:	\$0.00
Shipping:	\$0.00
Grand Total:	\$23,606.00



- For subsequent years within the term bound by the Start Date and End Date detailed on this quote, LINQ is entitled to increase the fees specified in the Order Form to the then-current subscription fees for the LINQ Products, as set forth in the LINQ price list in effect as of such date.
- Any applicable state sales tax has not been added to this quote. Subscription Start and expiration
 Dates shall be as set forth above, which may be delayed based upon the date that LINQ receives your
 purchase order.
- In the event that this quote includes promotional pricing, such promotional pricing may not be valid for the entire period stated on this quote.
- Ground shipping or most reasonable shipping costs will be added to the invoice after shipment for all Hardware orders.
- You will be required to pay LINQ for travel expenses (lodging, meals, transportation, and other related expenses) incurred in the performance of Professional and Support Services.
- All invoices shall be paid within thirty (30) days of the date of invoice.
- All purchase orders must contain the exact quote number stated within. Customer agrees that purchase orders are for administrative purposes only and shall not impact the terms or conditions reflected in this quote and the applicable LINQ Master Subscription Agreement.
- This quote is subject to and incorporates the terms and conditions of the LINQ Master Subscription Agreement found at https://www.ling.com/legal-msa/
- The parties below acknowledge that they have read the agreement, understand it and agree to be bound by its terms.

Customer: Signature: Name: Business Title: Authority Level: Date: Lee County Schools-NC



Lee County Schools Staffing Study







Evergreen Solutions, LLC

December 19, 2023

Staffing Study

As a follow-up to the 2023 Performance Audit, Evergreen Solutions was asked to analyze LCS staffing in place for the 2023-24 school year. The study focused on the number and type of campus- and district-level staff as well as the reporting relationships between and among the positions to determine whether staffing patterns and allocations were effective, efficient and strategically aligned to advance the District's goals and objectives.

To begin the study, Evergreen analyzed the campus- and district-level staffing based on the employee database provided at the beginning of the 2023-24 school year, reviewed the existing job descriptions, and conducted individual interviews with select principals from elementary, middle and high school as well as members of the Leadership Team.

This report is organized into the following sections:

- A. Overview of Staffing Allocations and Funding Sources
- B. Campus-Based Staffing
- C. Departmental and Central Office Staffing

A. OVERVIEW OF STAFFING ALLOCATIONS AND FUNDING SOURCES

For almost every school district, salaries and benefits comprise 75-85 percent of all general operating expenses. LCS' salaries and benefits represent approximately 83 percent of total expenditures. Having the optimum number of qualified staff filling each position is therefore a major educational, operational, and budgetary challenge. This study examines staffing at all major levels to determine whether current staffing levels are effective in accomplishing the goals of the District and are equitably distributed for optimum efficiency.

Funding for staff positions comes from state, local and federal sources. The State of North Carolina allocates funds to the local districts based on enrollment levels and other factors. Local funds for staffing are added to the state funds in the form of salary supplements and to pay for additional positions or additional contract days that are not paid for by the State. Federal funds are granted to enhance programs and staffing in key areas, such as career and technology education, at schools serving at-risk populations, and to provide special educational programs for exceptional children.

As shown in **Exhibit 1**, state funding is closely linked to students in average daily membership (ADM).

EXHIBIT 1 STATE INITIAL ALLOTMENT FORMULAS 2023-24 FISCAL YEAR

Category	Administration Basis of Allotment (Funding Factors are rounding.)	
Central Office Administration (PRC 002)	Increase by LEA from 23-24 initial Allotments is 4%	
200 A 50 C C C C C C C C C C C C C C C C C C	ructional Personnel and Support Services	
Ilist	ructional Personner and Support Services	
Category	Basis of Allotment (funding factors are rounded.)	Allotted Salary
Classroom Teachers (PRC 001)	The average Teacher salary increase is 4% for FY23-34	
Grades Kindergarten	1 per 13 in ADM.	
Grade 1	1 per 16 in ADM.	
Grades 2 - 3	1 per 17 in ADM. 1 per 24 in ADM.	7-11
Grades 4 - 6 Grades 7 - 6	1 per 23 in ADM.	LEA Average
Grade 9	1 per 25.5 in ADM.	
Grades 10 - 12	1 per 29 in ADM.	
Math/Science/Computer Teachers	1 per county or based on sub agreements.	
	IFE Convertions for FYC4 are caculated at the Teacher state wide average callary including benefits (\$77,061)	
Program Enhancement (PRC 004)	1 per 1:191 in K-5 ADM	LEA Average
Teacher Assistants (PRC 027)	The number of classes is determined by a ratio of 1:21. K-2 TAs per every 3 classes; Grades 1:2-1 TA for every 2 classes; and Grade 3-1 TA for every 3 classes.	\$43,530
School Health Personnel (PRC 006)	1 position per LEA; additional positions per 419.69 in ADM rounded to the nearest half position. PRC change per \$1,2029-134 (HB269)	State Wide Average
Instructional Support (PRC 007)	1 per 415.12 in ADM. PRC change per 8L2023-134 (HB259)	State Wide Average
School Building Administration (PRC005)	Schools opening prior to 7/1/2011 are eligible for 1 per school with at least 100 ADM or at least 7 state	
John Danieng Authinisa auton (1 10000)	paid teachers or instructional support personnel.	
Fincpes	Schools opening after 7/1/2011 are eligible for 1 per school with at least 100 ADM only.	LEA Average
Assistant Principals	1 month per 99.53 in ADM (rounded to nearest whole month)	LEA Average
Career Technical Ed MOE (PRC 013) (LIMITED FLEXIBILITY- Selecy Increase)	Base of 50 Months of Employment per LEA with remainder distributed based on ADM in grades 8-12.	LEA Average
Classroom Materials/Instructional (PRC 061)	\$38.07 per ADM plus \$2.69 per ADM in grades 8 and 9 for PSAT Testing	
Supplies/Equipment	(FY24 Includes \$10m non recurring Indian Garning)	
Textbooks (PRC 131)	\$31.12 per ADM in grades K-12.	
rextagging (Fito 101)	Employee Benefits	
Category	Basis of Allotment	
Hospitalization	\$7,557 per position per year.	
Retirement	25.02% of total salaries.	
Social Security	7.65% of total salaries.	
	ge Salaries for FY 2023-24 (Benefits are not included)	
Category	Basis of Allotment	
Category Feachers	\$52,391	
Program Enhancement Teachers	\$52,174	
	\$58.691	
School Health Personnel	\$58,681 \$7.254	
Principals (MOE)		
Assistant Principals (MOE)	\$5,385 \$5,302	
Career Technical Ed. (MOE)		
nstructional Support	\$58,532	
School Resource Officer Note: Dollars for 2023-24 position/month allotments are to the same state of		salary.
	Support	
Category	Basis of Allotment (Funding Factors are rounded.)	
Noninstructional Support Personnel (PRC 003)	\$320.92 per ADM.	



EXHIBIT 1 (Continued) STATE INITIAL ALLOTMENT FORMULAS 2023-24 FISCAL YEAR

	Categorical Programs						
Category	Basis of Allotment (Funding Factors are rounded.)						
Academically or Intellectually (PRC 034) Gifted Students	\$1,460.70 per child for 4% of ADM.						
At-Risk Student Services (PRC 069)	Each LEA receives the dollar equivalent of one resource officer (\$63,16 dismbuted based on ADM (\$101.63 per ADM) and 50% is dismbuted as Lew broame poverty data (\$492.13 per por child). Each LEA receives instructional support personnel (\$324,564).	used on number of poverty children, per the federal Tise 1					
Children with Disabilities (PRC 032) School Aged	88, 300.31 per funged child count. Child count is comprised of the lesse allotted 4.D.M.	er of the April 1 handicapped child court or a 13% cap of the					
Preschool	Base of 877,061 per LEA; remainder distributed based on April 1 est. of	tild court of ages 3, 4, and PreK- E, (83,371.79) per child.					
Group Homes (PRC 063)	Approved applications.						
Developmental Day Care (3-21) (PRC 053)	To be allotted in Revision						
Community Residential Centers (PRC 063)	To be allotted in Revision						
Disadvantaged Student (PRC 024) Supplemental Funding	See the Alloanent Policy Manual for formula for allocating supplemental the needs of alload/antaged students.	funding to address the capacity needs of LEAs in meeting					
Driver Training (PRC 012)	\$206.69 per public, charter, private and federal 9th Grade ADM.						
Limited English Proficiency (PRC 054)	Base of a teacher asst. (843,630); remainder based 60% on number of to concentration of LEP students (83,692.39)	Punded LEP students (8817.29) and 50% on an LEA's					
Low Wealth Supplemental Funding (PRC 031)	See the Allotment Policy Manual for formula allocating supplemental funds to eligible LEAs that are located in counties that do not have the addity to generate revenue to support public schools at the state average level.						
School Technology (PRC 015)	No New Appropriation : Pines and Portetures (\$1656 for FY 23-04						
***	ADM<	Allotment					
	1,300	1,520,000					
	1,700	1,774,700					
	2,000	1,729,400					
Small County Supplemental Funding (PRC 019)	2,300	1,554,100					
	2,600	1,635,600					
	2,800	1,593,500					
	3,500	1,548,200					
	Please see the allotment policy Manual for Special Provisions.						
Transportation (PRC 056)	95% of the budget was released at the time of Initial Allotments, provide by April 1 of that fiscal year be allocated to all school units based on effi-						
Career Technical Education - Program Support (PRC 014)	\$10,000 per LEA with remainder distributed based on ADM in grades	8-12 (\$38.71).					
Restriction	ons for FY 2023-24 through an ABC transfer						
Category	Restrictions						
Central Office Administration	No funds shall be transfered into this category.	Manual Salaman (A. Salaman)					
Teacher Assistants	No funds shall be transfered out of this category. No funds shall be transfered out of this category.						
Academically or Intellecutally Officed CTE Months and Support	Transferred only as permitted by federal law and grants or rules by State	Board of Education.					
Driver Training	No funds shall be transferred into or out of Driver's Education.	Notation of State and Stat					
Children with Disabilities	No Funds shall se transferred out of this category.						
	No Funds shall be transferred out of this category.						
Limited English Proficiency School Technology	No transfers in or out.						

Source: LCS Finance Office, December 2023.

State allotments for regular teachers, for example, are fairly straightforward. Projected ADM is used to determine the initial allotment for classroom teachers, but as ADM changes during the year, adjustments may need to be made.

Principals are allotted by the State as one per school, whereas Assistant Principals are allotted in terms of months, with one month granted for every 98.53 students in ADM rounded up to the nearest whole month. For example, a school with an ADM of 450 students would be allocated 5 months for an Assistant Principal (450/98.53 = 4.7 months). Career and



Technology positions are also allocated based on months, with an initial allotment of 50 months and then the addition of extra months based on ADM in Grades 9-12. These allocations based on months versus positions make the contracting process for these positions particularly important. For example, 50 months for Career and Technology could equate to five 10-month positions or 4.2 12-month positions.

In preparation for the 2023-24 fiscal year, the State provided the estimated allocations, shown in **Exhibit 2.** Some of the formulas are based on number of positions and some are based on number of months. In the Classroom Teacher category (PRC 001), 410 positions are allocated. Average salaries and benefits shown above are used to estimate the dollar amount of the allotments.

EXHIBIT 2 STATE BUDGET ALLOTMENT REVISION#: 010 2023-24 FISCAL YEAR

		Current Allotment Revision #010	Tota	I Revised	l Allotment
	The second secon				Y-T-D
PRC	PRC Description	Amount	Position	Month	Allotment
001	Classroom Teachers	\$0	410	0	\$30,310,070
002	Central Office Administration	\$0	0	0	\$838,373
003	Non-Instructional Support Personnel	\$0	0	0	\$2,911,682
004	K-5 Program Enhancement Teachers	\$0	22	0	\$1,660,670
005	School Building Administration	\$0	0	284	\$2,860,620
006	School Psychologist - Position	\$0	23	0	\$1,964,407
007	Instructional Support Personnel - Certified	\$0	22	0	\$1,876,402
013	Career Technical Education - Months of Emp.	\$0	0	458	\$3,515,150
014	Career Technical Education - Program Support	\$0	0	0	\$156,248
024	Disadvantage Students Supplemental Funding	\$0	0	0	\$642,605
027	Teacher Assistants	\$0	0	0	\$2,971,257
031	Low Wealth Counties Supplemental Funding	\$0	0	0	\$3,506,897
032	Children with Disabilities	\$0	0	0	\$6,691,626
034	Academically or Intellectually Gifted	\$0	0	0	\$530,234
048	Principal and Other Teacher Performance Bonuses	\$20,992	0	0	\$20,992
054	Limited English Proficiency	\$0	0	0	\$1,388,162
056	Transportation of Pupils	\$0	0	0	\$2,316,629
061	Classroom Materials/Instructional Supplies/ Eqp.	\$0	0	0	\$349,215
069	At-Risk Student Services/Alternative Schools	\$0	0	0	\$2,405,795
071	Supplemental Funds for Teacher Compensation	\$2,217,515	0	0	\$2,217,515
131	Textbook & Digital Resources	\$0	0	0	\$282,383
	Subtotal	\$2,238,507	477	742	\$69,416,932

Source: LCS Finance Office, November 2023.

One major change in the allotment is the reference to 'School Psychologists' in Program Report Code (PRC) 006. The State Initial Allotment Formulas indicate there is one allotted for each district, plus one for every 4,278.34 in ADM rounded to the nearest half position. Based on this formula, LCS would be allocated 2.5 Psychologist positions. **Exhibit 2**, however, shows 23 positions being allotted for a total of \$1.96 million. Recent revisions to the State Allotment Manual changes the titling of PRC 006 to be School Health Personnel and broadens the

category to include school psychologists, school counselors, school nurses, and school social workers.

B. <u>CAMPUS-BASED STAFFING</u>

When the study began in Fall 2023, LCS provided Evergreen with a database of all currently filled positions in the District. A list of current vacancies was added to the list, to obtain a clearer picture of the total number of budgeted positions overall. In all, a total of 1,314 budgeted positions were identified with 428 unique titles or classifications. For analysis purposes, Evergreen worked with the administration to categorize these titles/classifications into manageable categories. For example, grade-level teachers, subject-matter teachers and any other teaching positions not specifically identified as being Exceptional Children Teachers, Title I Teachers, or Title II Teachers, were placed in the Teacher Category.

For custodians, child nutrition assistants and/or instructional assistants that are dual employees with bus driving or monitoring responsibilities, the positions are recognized in this study as custodians, child nutrition assistants and/or instructional assistants as they drive or monitor buses before and after their primary assignments. The one bus driver shown in these charts is solely assigned to drive a bus and has no other dual responsibility.

Exhibits 3 and **4** provide an analysis of the campus-level staffing by category at the secondary and elementary schools, respectively.

EXHIBIT 3 SECONDARY STAFFING STRUCTURE 2023-24 SCHOOL YEAR

School, Staffing Category	East Lee Middle	SanLee Middle	West Lee Middle	Lee County High	Southern Lee High	Lee Early College
Student ADM - October 31, 2023	477	777	216	1,436	1,166	262
		School A	School Administration			
Principal	1	1	Т	₩	1	H
Assistant Principal	2	2	2	4	က	
Dean of Students					Н	
Dean of Students - ESSER	T	H	T			
Office Support	2	က	က	4	4	2
Office Support/Bookkeeper	₹	T	4		⊣	
Athletic Director				*	H	
Music Director-Band				H	П	
Total School Administration	7	00	8	11	12	ო
		Professional/	Professional/Academic Support			
Academic Coach	T	T	7			
Coordinator				Н		
Coordinator - ESSER					⊣	
CTE Director				2	H	
Digital Learning Facilitator	1			H	H	
Lead Teacher				H		
School Psychologist	2					
School Social Worker **	T	1	1	2	+	
Speech Language Pathologist			1	-		
School Counselor	3	3	2	4	4	
School Counselor - ESSER				₹		
Total Professional/Academic Support	8	5	5	13	00	4
		Nursing ar	Nursing and School Health			
School Nurse	1	1	1	2	1	
Total Nursing and School Health	1	7	1	2	Н	0



EXHIBIT 3 (Continued) SECONDARY STAFFING STRUCTURE 2023-24 SCHOOL YEAR

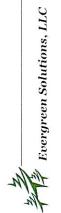
School, Staffing Category	East Lee Middle	SanLee Middle	West Lee Middle	Lee County High	Southern Lee High	Lee Early College
Student ADM - October 31, 2023	477	777	576	1,436	1,166	262
Instructional Assistant	4	က	က	4	2	Ħ
Instructional Assistant - ESSER				3		
Instructional Assistant-EC	2	T	2	4	7	
Media Coordinator		1				
Total Instructional Assistants	9	2	വ	11	12	T
Total Teacher and Instructional Assistants	45	59	44	105	88	13
		Operation	Operational Support			
Bus Driver	T					
Child Nutrition Assistant	2	4	2	က	2	
Child Nutrition Assistant Manager	1	Τ	1	2	1	
Child Nutrition Manager	1	τ	1	1	1	
Custodian	3	7	2	7	4	₩
Head Custodian	1	Ţ	1	1	1	
Technology Technician I					1	
Technology Technician II		Τ				1
Technology Technician III	1		1	1		
Total Operational Support	10	12	8	15	10	2
Grand Total	71	85	99	146	120	19
Student To Total Staff Ratios	6.72	9.14	8.73	9.84	9.72	13.79
Student To Teacher Ratios	12.23	14.39	14.77	15.28	15.14	21.83
Student To Admin Ratios	59.63	155.40	115.20	110.46	145.75	262.00

* Lee County High School has two contract people that fill the athletic director role

** Social Workers are all districtwide positions, assigned to a school or schools so are included here as a campus=level position.

*** Positions funded with ESSER money are shown in red.

Source: Compiled by Evergreen, November 2023.



ELEMENTARY STAFFING STRUCTURE 2023-24 SCHOOL YEAR

School, Staffing Category	B. T. Bullock Elementary	Broadway Elementary	Deep River Elementary	Greenwood	J. Glenn Edwards Elementary	J. R. Ingram, Ir Flementary	Tramway	W. B. Wicker Flementary
Student ADM - October 31, 2023	486	456	528	552	514	392	554	563
			School Adr	School Administration				
Principal	1	1	1	1	T	H	Н	1
Assistant Principal	1	T	1	₽	1	H	Н	1
Office Support	2	2	2	2	2	2	2	2
Office Support/Bookkeeper	1	1	1	1	T	H	T	П
Total School Administration	5	5	5	2	വ	വ	വ	വ
			Professional/Ac	Professional/Academic Support				
Academic Coach	1							Н
AIG Specialist	1	1	1	T	П	₽	н	Т
Digital Learning Facilitator	1		1					Н
Interpreter - Sign Language								Н
Intervention Specialist	3	3	2	2	က	ю	8	က
PPEERS Administrative Intern	1							Т
School Counselor	1	Н	1	1	T	₽	Н	П
School Social Worker*	1					₩		
School Social Worker - ESSER**		₹	⊣					
Speech Language Pathologist	1	₹	T	⊣	Н	Н	₽	1
Speech Language Pathology	П							
Total Drofessional / Academic								
Support	11	7	7	ro	ဖ	7	c	10
Nursing and School Health								ì
School Nurse	1	1	1		1	H	Н	Н
Health Assistant								Д
Total Nursing and School Health	т	1	1	1	1	1	Т	2



ELEMENTARY STAFFING STRUCTURE 2023-24 SCHOOL YEAR

W. B. Wicker Elementary	563		4	35	8		42	13	LC.		19	61		_	1 4		_	-	m		П	80	86	6.55	13.40	5
Tramway	554		4	34	2		40	14	2	-	17	57		_	1 4			~	2	Н		7	92	7.29	13.85)))
J. R. Ingram, Jr. Elementary	392		2	24	2		28	6	2	Т	12	40		2	₩		₹	+	2			7	09	6.53	14.00	
J. Glenn Edwards Elementary	514	2000	4	34	2		40	14	2		17	57		4			2	1	2			6	78	6.59	12.85	
Greenwood Elementary	552	Teachers and Instructional Assistants	က	33	ಬ		41	12	2	Н	15	56		2	₽		1	Т	ო			80	75	7.36	13.46	1
Deep River Elementary	528	eachers and Inst	2	31	2		35	12	2	Н	15	20		H	Н	H	Н	н	2			7	70	7.54	15.09	10.8V/25045/24045-2455/002
Broadway Elementary	456	Te	4	29	2		35	13	2	T	16	51		2	П		H	₽	T	7		7	71	6.42	13.03	TO A STANDARD CONTRACTOR OF THE PERSON OF TH
B. T. Bullock Elementary	486		4	29	2	T	36	11	2	₽	17	53		Н	7	Т	T	H	2	1		8	78	6.23	13.50	A CONTRACTOR OF THE PARTY OF TH
School. Staffing Category	Student ADM - October 31, 2023		Exceptional Children Teacher	Teacher	Title I Teacher	Title II Teacher	Total Teachers	Instructional Assistant	Instructional Assistant-EC	Media Coordinator	Total Instructional Assistants	Total Teacher and Instructional Assistants	Operational Support	Child Nutrition Assistant	Child Nutrition Assistant Manager	Child Nutrition Food PT	Child Nutrition Manager	Head Custodian	Custodian	Technology Technician I	Technology Technician II	Total Operational Support	Grand Total	Student To Total Staff Ratios	Student To Teacher Ratios	

*Social Workers are all districtwide positions, assigned to a school or schools so are included here as a campus=level position.
** Positions funded with ESSER money are shown in red.
Source: Compiled by Evergreen, November 2023.



Exhibit 5 provides staffing information for the three Specialty campuses. Ratios are not provided as the student populations and needs vary significantly from traditional schools.

EXHIBIT 5 SPECIALTY SCHOOL STAFFING STRUCTURE 2023-24 SCHOOL YEAR

School. Staffing Category	Warren Williams School	Bragg Street Academy	F. L. Knight/The Children's Center		
Student ADM - October 31, 2023	Varies	51	Varies		
	School Administration				
Principal		1	1		
Office Support	1	1	3		
Total School Administration	1	2	4		
Pro	fessional/Academic Su	pport			
Audiologist			1		
Coordinator	1				
EC Behavior Specialist		1			
EC-Pre-School Specialist			11		
Exceptional Children-Pre-School-ITN			1		
Community Agencies					
Lead Teacher	1				
Occupational Therapist			3		
Physical Therapist			2		
School Counselor		1			
School Social Worker*		1			
Speech Language Pathologist			2 10		
Total Professional/Academic Support	2				
r	Nursing and School Hea	lth			
School Nurse			1		
Health Assistant			1		
Total Nursing and School Health	0	2			
Teach	ers and Instructional As	sistants			
Teacher	8	9	6		
Exceptional Children Teacher		2	9		
Instructional Assistant	9	2	2		
Instructional Assistant-EC		2	26		
Total Teacher and Instructional	17	15	43		
Assistants		10	10		
	Operational Support				
Custodian		1	1		
Head Custodian	1		1		
Total Operational Support	1	1	2		
Grand Total	21	21	61		

^{*}Social Workers are all districtwide positions, assigned to a school or schools so are included here as a campus=level position.

Source: Compiled by Evergreen, November 2023.



Student Services Staffing Levels

The 2023 Performance Audit (Exhibit 9-24) contained a comparison of Student Services Staffing in LCS to its peers and the industry standards, and concluded that LCS is in line with its peers in all areas except psychological services. The ratios did not include the LCS contract with an outside provider for some psychological services, which has proven successful. LCS as well as its peers fall short of the North Carolina recommended number of guidance counselors per student ratio of 250 students per counselor. During interviews, the primary reason given for the shortfall in both areas was the inability to recruit and retain qualified applicants for these positions; a national crisis exacerbated by the pandemic. As noted in the Performance Audit, innovative solutions are being sought to address these needs.

Campus Administration

FINDING

Although some changes were implemented for the 2022-23 school year, the Assistant Principals (APs) are on a 10-month contract, but are offered an extension which has in the past resulted in most APs working 12 months. This practice is costly for the District as the funds for these positions are, in most cases, locally funded.

State formulas allot 12 months per school with 100 or more pupils in final ADM and/or seven or more full-time (FTE) equivalent state allotted/paid teachers and instructional support personnel. Therefore, 17 Principal positions at 12 months (204 months) are allotted to LCS under the category School Building Administration – PRC005 for Principals. Eliminating 204 months from the 284 months allotted above, leaves a total of 80 months allotted for APs. This would equate to 8 State-funded AP positions with 10-month contracts, or 6.7 positions with 12-month contracts. There are currently 19 budgeted AP positions and 4 Deans of Student budgeted positions in LCS—three of the Dean of Student positions are currently paid for with ESSER funds.

While the role of an AP is a vital function for a school, many districts vary the contracts by grade level and specific needs or programs offered at each school. The contract extension option is still available for special needs, but the structure is set up to assign responsibility for ongoing activities to an AP with a contract that takes that activity into account. For example, in a school that regularly offers summer school, one AP is contracted to oversee that activity.

Evergreen contacted several of the peer districts used for the Salary and Classification Study and found that most use a system to consistently issue AP contracts that limit the need for extensions:

- Harnett County Schools, for example, issues 10- 11- and 12-month contracts based on need.
- Granville County Schools offer Elementary APs 10-month contracts, and Middle and High School APs 11-month contracts with no contract extensions, specifically. Each Granville school, however, is allotted additional hours of 'administrative' employment to use as needed, which can be used for Assistant Principals.



 All APs in Stanly County Schools are on 11-month contracts, and while there are some contract extensions issued, the Human Resources Office said it is uncommon.

Implementing a system to consistently issue contracts based on the actual time needed to perform the essential functions of the job ensures that District resources are used effectively and efficiently.

RECOMMENDATION 1: Evaluate the actual contract needs for Assistant Principal positions and begin issuing contracts for 10,11 or 12 months based on need. Discontinue the practice of issuing contract extensions on a regular basis.

The use of contract extensions should be limited to those instances when an unusual need arises. To determine the actual contract length for each AP position, the administration and campus principals should build a calendar of events for the summer months and determine what ongoing activities require one or more APs to assist.

FISCAL IMPACT

Approximately 18 contract months could be saved by setting Elementary APs contract to 10 or 11 months (approximately 10 months saved) and Secondary APs to 11 or 12 months (approximately 8 months saved). Based on the average monthly salary of an Assistant Principal of \$6,752, reducing the total extended contract months by approximately 18 months would result in annual local savings of \$160,433 (\$121,540 salary + \$38,893 for 32 percent benefits).

Office Support

FINDING

LCS campuses appear to be consistently allocated office support positions based on the grade levels served at the schools, but the number of contract days/hours is not consistent. The allocations also do not appear to take into consideration the number of students (and their families) or the program needs of the schools served by these positions.

The standard staffing pattern for office support at the elementary level includes:

- 1-Office Support/Bookkeeper
- 1-Office Support/Data Manager
- 1-Office Support/Receptionist

At the secondary level, the titles are not as consistently allocated; however, there are generally four allocated positions at the middle school level, with the addition of a second general Office Support position. At the high school level, there are generally five allocated positions, with the addition of a third Office Support position.

A 2021 report from the Texas Association of School Boards gives the Industry Standard for Office Support:

The benchmark for clerical staff is 5.5 positions per 1,000 students at the secondary campuses, with a minimum of three positions. The elementary campus benchmark is 4.5 positions per 1,000 students, with a minimum of two positions.

Elementary campuses should always be staffed with a minimum of two staff. This staffing level ensures safety and customer service is a priority. Often, clerical staff at the elementary campuses may be assigned multiple roles juggling a variety of tasks.

Secondary clerical staff are typically more specialized due to larger enrollments at secondary campuses compared to elementary campuses and a greater staffing level determined by the benchmark. Adjustments may be made for secondary campuses (e.g., alternative campus) with lower enrollments. As an example, staffing a 200-student alternative campus with two clerical staff instead of the minimum three positions for secondary campuses is more fiscally responsible.

While the LCS elementary allocations fall within these guidelines, the office support staffing at the high school level falls below the standard.

Inconsistencies also occur in the annual contract days worked.

General Classification	Contract Days
 Bookkeepers Receptionist Data Manager/Attendance General Office Support 	264 (most common), 220, 252 220, 242, 264 264 (most common), 242 220, 242, 264

During interviews, principals indicated that vacancies in any of these positions required the remaining staff, as well as the principals and assistant principals, to step in to handle the clerical and administrative tasks for the vacant positions. Most said that, when possible, Instructional Assistants and other available staff are used to fill the gaps as needed. Because the campuses are responsible for scheduling bus transportation for their students, any office support absences can disrupt that process.

Principals were quick to add that not having the office support staff they need during summer school, and for scheduling and planning purposes during the summer, is a major drawback for principals, as the work still has to be accomplished, and in most cases, that work is left to them and the assistant principals when no one is there to assist.

RECOMMENDATION 2: Develop an office staffing allocation of positions and contract lengths, based on the student population as well as the needs of the schools and the programs offered.

At a minimum, at least one additional position is needed at Lee County High School—based on its population of approximately 1,400 students. Adjusting the contract lengths to meet the



actual needs of the schools, and adopting a process for consistently applying those standards will require collaboration between the campus and central administration.

FISCAL IMPACT

For estimating purposes, the cost to add an additional office support position at Lee County High School would be \$46,200 (\$35,000 estimated annual salary plus 32 percent benefits of \$11,200).

The cost for extending the contract lengths will be entirely based on the findings of the campus and central office administrators, but for estimating purposes Evergreen assumes that an additional 4,000 hours (500 8-hour days) will be needed. At an average hourly rate of \$16.15 for all of the office support positions, this equates to an annual cost of \$85,272 (\$64,600 in salary plus 32 percent benefits of \$20,672). In total, Evergreen estimates the total cost for implementing this recommendation will be \$131,472.

Instructional Staffing

LCS Board members and administrators expressed their desire to keep the class sizes small districtwide as one of the strategies for improving student performance and consequently allocates staff locally to meet local goals. The State allotments for instructional staff, which differ from the District's allocations, are as follows:

The State allotment for Classroom Teachers (PRC 001):

- Grades Kindergarten 1 per 18 in ADM.
- Grade 1 1 per 16 in ADM.
- Grades 2 3 1 per 17 in ADM.
- Grades 4 6 1 per 24 in ADM.
- Grades 7 8 1 per 23 in ADM.
- Grade 9 1 per 26.5 in ADM.
- Grades 10 12 1 per 29 in ADM.
- Math/Science/Computer Teachers 1 per county or based on sub agreement

The State allotment for Teacher Assistants (TAs) (PRC 077) is based on the number of classes at each grade level (determined by a ratio of 1:21):

- K- 2 TAs per every 3 classes;
- Grades 1-2 1 TA for every 2 classes; and
- Grade 3 1 TA for every 3 classes

Exhibits 6 and **7** show the current Teacher and Instructional Assistant staffing levels, including vacancies, in comparison to the number of students in Average Daily Membership (ADM) at the elementary and secondary levels.



ELEMENTARY INSTRUCTIONAL STAFFING

School and Employee Category	B. T. Bullock Elementary	Broadway Elementary	Deep River Elementary	Greenwood Elementary	J. Glenn Edwards Elem.	J. R. Ingram, Jr. Elem.	Tramway Elementary	W. B. Wicker Elementary	Grand Total
Teachers and Instructional Assistants	tants								
Exceptional Children Teacher	4	4	2	က	4	2	4	4	27
Teacher	29	29	31	33	34	24	34	35	249
Title I Teacher	2	2	2	S	2	2	2	m	20
Title II Teacher	1								1
Total Teachers	36	35	35	41	40	28	40	42	297
Instructional Assistant	11	13	12	12	14	6	14	13	98
Instructional Assistant-EC	5	2	2	2	2	2	2	S	22
Media Coordinator	Т	1	1	1	Т	Н	П	H	8
Total Instructional Assistants	17	16	15	15	17	12	17	19	128
Total Teacher and									
Instructional Assistants	53	51	50	56	57	40	57	61	425
			Student to	Student to Staff Ratios					
Students per Teacher (AII)	13.5	13.0	15.1	13.5	12.9	14.0	13.9	13.4	13.6
Regular Ed Students to Regular Ed Teachers	14.1	13.2	15.2	14.5	12.9	14.3	13.6	13.9	13.9
Regular Ed Students to Reg IAs	37.3	29.4	39.3	39.8	31.3	38.1	33.1	37.3	35.4
EC Students in Resource of									
Separate Classroom to EC	7	,	C	1	1	L (L	l (,
reachers	0.7	4.3	3.5	6.7	8.7	6.5	5.8	6.5	6.1
EC Students in Resource of									
Separate Classroom to EC IAs	5.6	8.5	3.5	10.0	15.5	6.5	11.5	5.2	7.5
3 3									

Source: Compiled by Evergreen from Data provided by LCS.

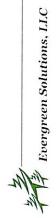
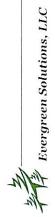


EXHIBIT 7 SECONDARY INSTRUCTIONAL STAFFING

School and Employee Category	East Lee Middle	SanLee Middle	West Lee Middle	Lee County High	Southern Lee High	Lee Early College	Grand Total
Teachers and Instructional Assistants							
Teacher	36	50	35	84	29	12	284
Teacher/Athletic Trainer					Н		4
Teacher/Sports Medicine				H			4
JROTC Instructor				T	Н		2
JROTC Officer				H	1		2
Exceptional Children Teacher	m	4	4	2	7		25
Total Teachers	39	54	39	94	77	12	315
Instructional Assistant	4	m	ю	4	വ	Н	20
Instructional Assistant - ESSER				က			က
Instructional Assistant-EC	2	П	2	4	7		16
Media Coordinator		H					1
Total Instructional Assistants	9	വ	വ	11	12	Т	40
Total Teacher and Instructional Assistants	45	29	4	105	68	13	355
Students per Teacher (All)	12.2	14.4	14.8	15.3	15.1	21.8	14.9
Regular Ed Students to Regular Ed Teachers	11.5	13.9	14.5	15.3	15.6	21.8	14.8
Regular Ed Students to Reg IAs*	103.3	231.3	169.3	183.9	209.2	261.0	210.5
EC Students in Resource of Separate Classroom to EC Teachers	5.7	10.0	7.3	6.1	5.7	n/a	6.8
EC Students in Resource of Separate Classroom to EC IAs	8.5	40.0	14.5	10.8	5.7	n/a	10.6

* Lee County HS includes 3 lAs paid with ESSER funds Source: Compiled by Evergreen from Data provided by LCS.



FINDING

A major challenge facing LCS for 2024-25 is finding sufficient funds to pay for the 26.2 positions previously paid for with ESSER funds (**Exhibit 8**).

Exhibit 8
ESSER Related Positions
FY 2023-24

Description	#	Looking Ahead
Federal Programs Director	1	Can Pay from Indirect Costs
Dean of Students @ each Middle School	3	*
AP Position	1	Attrition
Retired Teacher on Contract	2	Attrition
Teacher	2	Move to EC
Retired Guidance	1	Move to IPG
Social Workers	2	Likely Attrition
Guidance	2	*
Curriculum Coach @ each Middle School	3	*
Teacher Assistant	6	*
Translator	1	50% - EC and 50% - Fund 8-305
Nurse	1.2	*
Test Coordinator @ SLHS	1	:k
Total Positions	26.2	

^{*} Still Actively Seeking Funds

Source: LCS Finance Office, November 2023.

With the growing need for academic and behavioral intervention, it is critical for the District to free up resources to fund these positions that central office and campus leaders have indicated are having a positive impact on student performance is critical. As shown above, the District has begun to identify funding to cover some, but not all of the ESSER positions.

Evergreen is keenly aware of the District's desire to keep class sizes small. Studies show that smaller class sizes generate higher student participation, better behavior control, and greater job satisfaction for instructors. Therefore, its advantages extend beyond academic performance. However, given the critical need to reallocate funds to positions that have proven to be successful in addressing academic and behavioral needs, a careful assessment of student to teacher staffing ratios is needed.

It is important to note that because the student-teacher ratio compares the number of students to the number of full-time teachers across an entire school, particularly at the secondary level, a low ratio does not always equate to small class sizes. Therefore, to accurately determine the optimum number of classroom teachers (those teachers who are with the students in the classroom on a regular basis) for each class, course, and grade level the central and campus administration, in collaboration with teachers, need to develop a comprehensive goal and strategy for educational service delivery.

What is the optimum class size for effective instruction?



 What additional coaching, intervention services, multilingual services, etc. are needed to supplement regular classroom instruction and improve student performance?

At the elementary level, the allocation of teachers is fairly straight forward, and in most cases is driven by the District's class-size goals. At the secondary level, it is more difficult. It may be appropriate to have core courses with larger numbers of students, while elective and advanced courses may have a limited number of eligible students. There are also challenges at the secondary level with the sequencing of core courses and electives that simply make controlling staffing levels in this environment more difficult.

Many districts use a staffing plan which is updated annually for this purpose. A staffing plan should be based on sound educational practices and standards which may include the reallocation of some resources for the provision of more targeted support, such as those currently being ESSER-funded.

RECOMMENDATION 3: Carefully examine the student to teacher ratios at each campus and determine how, through attrition and or reassignment, funding can be reallocated to fund the current ESSER positions.

As a part of this exercise, the District should begin to formulate a staffing plan to establish educationally sound teacher and instructional support staffing guidelines, particularly at the secondary level.

FISCAL IMPACT

This recommendation is cost neutral, as any savings from the reallocation of positions is intended to cover the costs associated with funding the ESSER positions.

C. DEPARTMENTAL AND CENTRAL OFFICE STAFFING

As discussed above, there are a number of positions that are physically located on the campuses, but are paid with district-level funds. In addition to the campus-based positions, Evergreen identified 112 positions that are accounted for as being located at central office or another department facility.

Exhibit 9 provides a rough breakdown of the positions or position categories broken out by department, where possible. This information is provided as a snapshot in time, as LCS is in the process of implementing recommendation from the Performance Audit at the time of this writing.

EXHIBIT 9 CENTRAL OFFICE AND DEPARTMENTAL STAFFING

General Administration	Count	Exceptional Children	Count
Superintendent	1	Director for Exceptional Children	1
Public Information Officer	1	EC Compliance Specialist	2
Assistant Superintendent for Operations	1	Educational Diagnostician	2
Executive Director of Instruction for Performance	1	Office Support - Exceptional Children	1
Executive Director of Student Services	1	Physical Therapist	3
Director for Career Technical Education	1	Total Exceptional Children	9
Director for English as Second Language	1	Finance	Count
Director for Federal Programs - ESSER *	1	Chief Finance Officer	1
Director of Accountability and Testing	1	Asst. Finance Officer	1
Supervisor of School Nurses	1	Accounts Payable Specialist	1
Coordinators	7	Accounts Payable/System Operator	1
Curriculum Specialists English and Math	2	Payroll Specialist	4
Interpreter English/Spanish - ESSER *	1	Total Finance	8
Generic ESL Assistant	1	Human Resources	Count
Data Specialists	3	Executive Director for Human Resources	1
		Director of Recruitment, Retention, and	1
Bilingual Migrant Success Coach	1	Professional Development	1
Migrant Recruiter/Immigrant Success Assistant	1	HR Benefits Specialist (New)	1
Office Support	7	Office Support	1
Head Custodian	1	Human Resources Certified Specialist	1
Total General Administration	34	Human Resources Classified Specialist	1
Child Nutrition**	Count	Total Human Resources	6
Child Nutrition Director	1	Information Technology	Count
Office Support	1	Director of Technology	1
Child Nutrition Part Time	1	Wide Network Administrator	1
Child Nutrition Supervisor	1	Local Area Network (LAN)	1
Child Nutrition Warehouse Assistant	1	Office Support	1
Child Nutrition Warehouse Manager	1	Total Information Technology	4
Total Child Nutrition	6		
Total Child Nutrition	6		
Maintenance	Count	Transportation	Count
Cost Clerk	1	Office Support	2
Director of Facilities and Maintenance	1	Transportation - Mechanic	7
Electrician I	2	Transportation Director	1
General Maintenance	9	Total Transportation	10
HVAC Mechanic	3	Total Halloportation	
Maintenance Supervisor	2		
Office Support	1		
Total Maintenance	19	Grand Total Central Office/ Departmental	96

^{*} Positions funded with ESSER money are shown in red.

Central Office Support for Campuses

The 2023 Performance Audit recommended, and LCS has implemented or is in the process of implementing, many of the organizational changes at the leadership level. Therefore, this



^{**} Child Nutrition also has 16 substitute positions that are assigned by central office to the campuses, as needed. Source: Compiled by Evergreen, November 2023.

study focused primarily on the mid-level management and instructional support positions below the Director level. Some of these positions are physically housed at the central office, or are paid for centrally, but assigned to work with one or more campuses.

As noted in the Performance Audit, and confirmed through interviews during this staffing study, campus-level administrators continue to feel they are not getting all of the support they need from central office, with Special Education being an area of most immediate concern.

FINDING

There are a number of mid-level educational support classifications with similar roles and responsibilities that are assigned to work with or support campuses; however, the level of campus support and expectations are inconsistent.

During interviews, campus-level administrators questioned the value and actual time on-site assigned to various classifications. Central office administrators referred to multiple positions as coaches or lead teachers; however, in examining the employee database, the actual titles were different. At the middle school level, principals told Evergreen that the Academic Coaches assigned to their campuses are having a significant positive impact. Several campus and central office administrators said the Elementary Math Lead Teachers were having a significant impact on student performance. Coaches or positions having various titles and areas of focus were in some cases only on a campus one or two days a week, and while helpful, the value added by each position was not always clear to principals.

One area of specific need pointed out by almost every principal at every level was the need for more assistance with the paperwork, compliance reporting and general bureaucracy associated with Exceptional Children. There are two EC Compliance Specialists at the central office level, but according to principals they seldom visit the campuses and when they call for assistance on legal and compliance matters, assistance is difficult to obtain. Principals stated that teachers are inundated with paperwork, which detracts from their ability to work with children. The need for additional EC specific office support and more hands-on assistance in conducting and documenting Individual Education Plans were their primary concerns.

Historically, it appears that as student performance or behavioral issues arose, LCS added a position or positions to address the issue. The same holds true for positions in central office that may be administratively necessary, and were originally added to support the campuses, but now have only limited interactions with the campuses they were intended to serve.

Exhibit 10 is intended to be illustrative of the overlapping roles and responsibilities of the various categories specifically relating to academics. Not included are positions that are operational—such as those found in Finance and Human Resources.

EXHIBIT 10 SUMMARY OF MID-LEVEL EDUCATIONAL SUPPORT CLASSIFICATIONS

Category	Summary Description/Title Examples	Comments
Lead Teacher	 Works with administration to develop clear criteria for placing students in intervention programs; monitors effectiveness of programs, providing information to make adjustments to increase effectiveness. Plans, prepares and evaluates professional development initiatives for instructional staff. Works with instructional staff to analyze data relative to student learning, align the curriculum to ensure proper pacing of curriculum and development of results oriented instructional plans. 	Paid at district-level but assigned to campuses or programs such has Elementary Math, Academically and Intellectually Gifted (AIG), Exceptional Children (EC) and English as a Second Language (ESL)
Coach	Multiple uses of Coach Title – Generally those in academic support roles work with staff and students and coordinate delivery through central administration. Academic Coash (3) Middle Schools – ESSER Funds Bilingual Migrant Success Coach (1) Districtwide) EC Job Coach/Bus Driver (1)	Title appears to be used for Certified and Classified Staff. Some Coaches are districtwide positions, and some are campus based.
Specialist	Multiple uses of Specialist Title – Generally those in academic support roles work with staff and students and coordinate delivery through central administration. EC Compliance Specialist (2) districtwide EC Behavior Specialist AIG Specialist (8) campus-based Literacy Intervention Specialist (14) EL campus-based Data Specialist K-5 Intervention Specialist (1) campus-based	Title appears to be used for Certified and Classified Staff. Some Specialists are districtwide positions, and some are campus based.
Interventionist	Generally, applies to Intervention Teachers who are campus- based and work with target student populations.	Title used interchangeably by staff with Specialist and Coach.
Coordinator	Multiple uses of Coordinator Title Central Office: Safety Coordinator (1) Elementary AIG Coordinator (1) Elementary PowerSchool Coordinator (2) Elementary PowerSchool Coordinator (1) Secondary PowerSchool Coordinator (1) Mental Health Coordinator/Policy Advisor (1) Campus-based: Test Coordinator/FAFSA/CTE Credential Tracking (1) Media Coordinator (8) Pre-School Coordinator (2) IA- Safe School Coordinator (1) CTE-Instructional Management Coordinator (1) Career Development Coordinator (1) At Risk Student Coordinator (1) CTE-Career Development and Special Populations	Title appears to be used for Certified and Classified Staff. Not all position had job descriptions, however, the generic Coordinator JD requires a Master's Degree and states "The Coordinator serves to enhance the effectiveness of the educational process through the implementation and administration of a particular school program." The Media Coordinator position requires a Bachelor's Degree and states that the position, "provides the leadership and instructional resources and services for implementation of a school

Source: Compiled by Evergreen from data provided by LCS, November 2023.



The categories and classifications do not appear to delineate a reporting hierarchy or specify whether the position has any supervisory responsibilities. For example:

- Which, if any, of these positions have direct reports?
- Can a Specialist report to a Coordinator or a Coordinator to a Specialist?
- Are the titles or classifications assigned based on educational attainment? Or is it the fact that the position is paid on the Teacher pay scale?

The inconsistencies in the use of the titles and classifications could result in inequities in pay, contract terms and the like.

From the information obtained during interviews and the data examined, Evergreen found that hands-on expertise is definitely needed by the campuses to align curriculum, develop teacher capabilities, work with individual student needs, and ensure compliance with state and federal mandates. The manner in which this support is being delivered, however, appears to be somewhat piecemeal and inconsistently applied, and may not be providing campus administrators and teachers what they need to be successful in meeting District goals.

The Performance Audit discussed the need for a more consistent approach for managing curriculum and the need for a comprehensive strategic plan or a consistently-recognized, district-wide instructional approach.

RECOMMENDATION 4: Assess the value added by each of the academic support positions in the lead, specialist, coach, and coordinator categories; adopt consistent and appropriate titles; and require every position considered to be academic support to be physically on-site working with the campuses for a majority of their time.

Understanding that there are limited budgetary resources, in collaboration with campus administrators, assess the stated and actual roles and responsibilities assigned to these positions, determine the positions that add the greatest value, determine where overlap exists, and determine what campus administrators feel could be added, eliminated or modified to provide the necessary level of support. From this exercise, create a consistent titling and reporting hierarchy, and create a model to determine how these positions will be assigned districtwide.

FISCAL IMPACT

The intent of this recommendation is for existing budgetary resources to be used more efficiently by eliminating positions that are less valuable and using those resources to add positions that can have the most significant impact at the campus level. Therefore, this recommendation can be implemented with existing resources.

Child Nutrition Staffing

As discussed in the 2023 Performance Audit, LCS reduced overall full-time Child Nutrition staff by 31 positions from 77 in 2018-19 to 46 in 2022-23. Part-time staff were added,



bringing the total number of employees down by 13 positions. As a result, the profitability of the program improved.

From a management perspective, productivity is traditionally measured in meals served per labor hour (MPLH). When more meals are produced and served in an hour, the labor cost for each meal is reduced. Therefore, the productivity in a given school cafeteria can be improved by either increasing the number of meals served, or by reducing the total number of hours worked in that operation.

A meal equivalent is calculated as follows:

- Total lunches served divided by 1
- Total breakfasts served divided by 2

Supplemental sales and after-school snacks can also be calculated into the meal equivalents, but for purposes of this discussion, only breakfasts and lunches as considered.

Evergreen's 2011-12 study cited the industry standard to be between 16-19 MPLH. New federal nutritional guidelines have resulted in the use of more fresh produce, scratch cooking and the like, which has reduced the industry standard to be between 14-18 MPLH.

Exhibit 11 provides the MPLH calculations by campus for the first two full months of the 2023 school year. According to the Director, labor hours were not available for the 2022-23 school year.



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EXHIBIT 11 CALCULATED MEALS PER LABOR HOUR BASED ON MEAL EQUIVALENTS SERVED SEPTEMBER AND OCTOBER 2023

			September 2023	2023					October 2023	2023		
Campus	Hours	Total Breakfast Meals Served	Breakfast Meal Equivalents	Lunch Meals Served	Total Meal Equivalents	Sept	Hours	Total Breakfast Meals Served	Breakfast Meal Equivalents	Lunch Meals Served	Total Meal Fourvalents	Sept
Bullock Elementary	562.14	5,593	2,796.5	8,541	11,338	20.2	589.21	5,529	2,765	8,825	11,590	19.7
Broadway Elementary	525.71	3,828	1,914	6,692	8,606	16.4	558.59	3,802	1,901	6,642	8,543	15.3
Deep River Elementary	557.21	5,031	2,515.5	7,578	10,094	18.1	554.35	4,772	2,386	7,726	10,112	18.2
Greenwood Elementary	517.77	3,951	1,975.5	7,262	9,238	17.8	541.71	3,755	1,878	7,248	9,126	16.8
Edwards Elementary	548.69	5,939	2,969.5	7,698	10,668	19.4	578.45	5,597	2,799	8,056	10,855	18.8
Tramway Elementary	343.59	1,458	729	3,843	4,572	13.3	411.68	1,482	741	4,455	5,196	12.6
Ingram Elementary	547.51	2,943	1,471.5	5266	6,738	12.3	577.19	3,039	1,520	5,463	6,983	12.1
Wicker Elementary	541.69	4,675	2,337.5	8,673	11,011	20.3	544.34	4,447	2,224	9,043	11,267	20.7
East Lee Middle	502.05	2,534	1267	5,986	7,253	14.4	533.33	2,529	1,265	6,030	7,295	13.7
SanLee Middle	744.11	3,418	1709	9267	10,976	14.8	616.51	3,644	1,822	9,527	11,349	18.4
West Lee Middle	728.92	3,127	1,563.5	7,897	9,461	13.0	643.58	3,315	1,658	8,158	9,816	15.3
	0000				1							
Lee County High School	903.83	4,008	2,004	10,655	12,659	14.0	892.37	3,834	1,917	10,457	12,374	13.9
Southern Lee High School	565.11	2,196	1,098	10,236	11,334	20.1	658.74	2,445	1,223	10,590	11,813	17.9
Districtwide	7,588.33	48,701	24,350.5	99,594	123,945	16,3	7,700.05	48,190	24,095	102,220	126,315	16.4
Source: LCS Child Nutrition Director, November 2023.	Director, Nc	vember 202.	3.									

FINDING

On average, the staffing of LCS cafeterias is within industry guidelines; however, these numbers can fluctuate from month to month at any given campus and require constant monitoring.

For example, Tramway and Ingram Elementary Schools and West Lee Middle School fall below the standard in September. In October, Tramway and Ingram Elementaries remained below the standard, however, West Lee Middle School served more meals with fewer hours and the MPLH rose from 13.0 to 15.3 in one month. Unfortunately, in October, East Lee Middle School fell below the standard. This is a two-month snapshot, which means that an absence or other circumstance can cause a drop or rise.

For the two elementary schools, the number of meals served is disproportionate to the other schools in that grade level, which may mean there is a more systemic problem. If further analysis indicates that the participation rates at those schools are truly lower than the peer schools, monitoring and proactive measures are needed to increase participation rates. If the participation rates cannot be increased, staffing levels must decrease to bring the campuses in line with the MPLH standards.

In November 2023, 16 Child Nutrition Assistant positions were shown as vacant. Part-time assistants that are not required to drive a bus, and other regular assistants are filling in to cover those vacancies where possible. Consequently, some of the campuses with higher MPLH calculations may be the result of there not being enough people available to work the assigned hours.

The Director also indicated that Child Nutrition staff are being required to complete mandatory districtwide training in addition to the Child Nutrition specific training. In August and September of this year, all staff completed 12 hours of safety training beyond their normal hours. School staff, including Child Nutrition staff, have also undergone 1-3 hours of additional training, meaning that in these early months of the year, the hours worked may be inflated, thereby reducing the total calculated MPLH.

The Director of Child Nutrition recognizes that anomalies in hours and meals served will happen and has proactively identified several of the underlying reasons for the fluctuations—such as the additional training hours. Continuing to proactively identify the cause and addressing both positive and negative trends will continue to be critical to maintaining the overall productivity and profitability of the department.

RECOMMENDATION 5: Establish a MPLH goal districtwide and a goal for each campus to determine the actual number of positions that will be needed to meet those goals. Actively seek ways to increase participation rates and hold to staffing standards at each campus.

Based on the average hours worked in September and October 2023, it is not clear that LCS needs to fill all of the 16 vacant positions. Had the same number of hours been worked in September by existing staff (7,588 hours) and all 16 positions had been filled (16 positions X an average of 180 hours per month = 2,880 hours) the total hours worked would rise to 10,468 and the MPLH districtwide would drop to 11.8 MPLH.

Clearly, staff who worked more than their assigned hours to fill in for vacancies would need to be eliminated from that calculation. Consequently, an ongoing analysis and monitoring of the MPLH at each campus will be needed to determine how many of the existing vacancies should be filled based on participation rate trends.

FISCAL IMPACT

If even four of the vacant positions could be frozen, the potential annual cost avoidance for Child Nutrition would be significant. The starting salary for a Child Nutrition Assistant is \$2,253 per month or \$20,280 per year plus 32 percent for benefits, which totals \$26,770 (\$20,280 salary + \$6,490 benefits). If four positions remained unfilled, the annual cost avoidance for Child Nutrition would be \$107,078.

Maintenance and Custodial Staffing

The 2023 Performance Audit examined the appropriateness of the current maintenance staff, including technicians, and determined that the staffing levels were in line with industry standards. Onsite visits to the campuses during the audit found the campuses to be in good repair and principals and staff gave the maintenance team high marks for responsiveness.

FINDING

In comparison to industry standards, the custodial staffing levels are low, and the staffing issue is exacerbated by the number of vacant positions.

APPA (formerly the Association of Physical Plant Administrators) offers a great deal of information for the educational facility community. APPA has collected data as to the amount of a specific space that a custodian can be reasonably expected to clean give the tasks to be performed, the amount of time allocated to the tasks, the frequency of the tasks and the room type. These data were collected for 33 specific room types such as classrooms, offices, shower rooms, entrances, public circulation, and others. The book has a table that clearly displays what productivity can be expected and the outcome, or level of appearance of that productivity by room type.

Appearance levels ranging from Level 1 to Level 5 are clearly defined by APPA and include:

- Level 1 Orderly Spotlessness
- Level 2 Ordinary Tidiness
- Level 3 Casual Inattention
- Level 4 Moderate Dinginess
- Level 5 Unkempt Neglect

When a custodian is assigned a combination of room types, it is reasonable to expect them to clean from 17,000 to 30,000 square feet, depending on the assigned room types. Based on the 1.673 million square feet of LCS facilities, each of the current 56 budgeted positions are expected to clean almost 30,000 square feet. Considering the eight vacancies, the remaining 48 employees are expected to clean almost 35,000 square feet. Based on the on-



site campus visits, the current employees are to be commended for maintaining at least Level 2 cleanliness in most areas of the schools observed by Evergreen.

In an effort to determine the overall custodial staffing needs, Evergreen used a mid-level 25,000 square feet per custodian standard.

Based on this standard, Exhibit 12 shows that LCS is understaffed by at least seven positions.

EXHIBIT 12 CUSTODIAL STAFFING BY LOCATION NOVEMBER 2023

Facility	Grades Served	Acreage	Square Feet	Standard @ 25,000 Sq. Ft. Per Custodian	# of Budgeted Custodians and Head Custodians
		Elem	entary Schools		
Broadway	K-5	9.21	86,615	3.0	2
B.T. Bullock	K-5	60.51	78,768	3.0	3
Deep River	K-5	63.05	78,768	3.0	3
Greenwood	K-5	29.7	94.324	4.0	4
J. Glenn Edwards	K-5	30.9	70,229	3.0	3 (1 Vacant)
J.R. Ingram	K-5	43.7	70,229	3.0	3 (1 Vacant)
Tramway	K-5	34.2	78,768	3.0	3 (1 Vacant)
W.B. Wicker	K-5	18.05	125,345	5.0	4 (1 Vacant)
Total Elementary Schools				27.0	25
		Mic	dle Schools		
East Lee	6-8	36.94	95,983	4.0	4
SanLee	6-8	*	137,396	5.0	5
West Lee	6-8	45.95	95.983	4.0	3
Total Middle Schools	•			13.0	12
		Н	igh Schools		
Lee County	9-12	70.4	332,989	13.0	8 (2 Vacant)
Southern Lee	9-12	85.6	183,520	7.0	5 (1 Vacant)
Lee Early College	9-12	**		0.0	1
Total High Schools	-			20.0	14
		Spe	cialty Schools		
Bragg Street Academy	6-12	17.36	10.893	0.0	1
F.L. Knight Children's Center	K-12	12.41	33,073	1.0	2
Warren Williams	Pre-K	13.1	19,401	1.0	1
Total Specialty Schools				2.0	4
TOTAL SCHOOLS		571.08	1,592,284	62.0	29.0
			ER FACILITIES		
Bus Garage	n/a	5.64	7,962	n/a	
Jonesboro Elementary (Storage)	n/a	20.24	44,331	n/a	
Maintenance Facility	n/a	***	19,400 (Only about 5,000 is cleanable)	0.0	
ESL House	n/a	***	1,080	0.0	
Heins Education Building	n/a	2.755	22,344	1.0	1 (1 Vacant)
TOTAL OTHER		28.64	80,717	1.0	1
LCS TOTAL		599.72	1,673,001	63.0	56.0

^{*} SanLee Middle School is physically located on the SLHS Site

Source: Compiled by Evergreen from data provided by the District, November 2023.



^{**} Lee Early College is comprised of portable units physically located on Central Carolina Community College campus.

^{***} The Maintenance Facility and ESL House are physically located on the LCHS Site

Clearly, the Specialty Schools are smaller and the custodial assignments in some cases may involve non-custodial activities. If, however, all of those positions are needed, the actual staffing shortage is 10 positions, with the most serious shortages being at the high school level.

RECOMMENDATION 6: Using APPA guidelines, establish a reasonable custodial staffing standard and seek to fill the needed positions.

If employees cannot be found to fill the positions, contract services should be sought, particularly at the high school level. As discussed in the 2023 Performance Audit, there is significant efficiency to be gained by creating an after-hours shift of contractors or employees.

FISCAL IMPACT

An increase of eight or ten 12-month budgeted custodial positions with a monthly salary of \$2,600 would result in the following cost options.

Contract Months	Monthly Salary	Annual Salary	Number of Positions	Total Salary	Benefits at 32%	Total Savings
12	\$2,600	\$31,200	8	\$249,600	\$79,872	\$329,472
12	\$2,600	\$31,200	10	\$312,000	\$99,840	\$411,840

Using the 25,000 square foot standard, eight (8) additional employees would be expected to clean 200,000 square feet; an additional 10 employees would be expected to clean 250,000 square feet. Based on contract costs quoted in the 2023 Performance Audit for only deep cleaning activities in the evening hours, at a rate estimate of \$.05 per month, or \$.60 per square foot per year, contracting with an outside firm to clean 250,000 square feet would result in a cost of approximately \$125,000. For an additional fee, the contractor could be required to provide supervision of the workers during the evening hours when the District's head custodians are not available.

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Raleigh, N.C. 27602 Telephone: (919) 821-4711

http://www.tharringtonsmith.com

Federal Tax I.D. No.: 56-0852713

Lee County Board Of Education by email to: Susan Britt, Admin Asst. to Superintendent sbritt@lee.k12.nc.us

December 12, 2023 Client: 013334

Invoice #:

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For Professional Services Rendered Through November 30, 2023

RE: 000000 General

SERVICES

Date	Person	Description of Services	Hours	
11/6/2023	SGR	Travel to and attend special meeting.	2.80	
11/7/2023	SGR	Telephone conference with Womack re final contract details.	0.20	
11/7/2023	SGR	Review agenda and prepare documents for meeting.	0.30	
11/7/2023	SGR	Travel to and attend Board meeting.	4.20	
11/8/2023	SGR	Revise and finalize closed session minutes from special meeting.	0.20	
11/20/2023	NAR	Exchange emails with Rawson re Cognia survey and S.B. 49 compliance issues.	0.10	
11/29/2023	SGR	Review and respond to email from Britt re special meeting notice.	0.20	
11/29/2023	SGR	Review and respond to email from Mazzola re retention of policy committee records.	0.20	
		Total Professional Services	8.20	\$1,927.00

PERSON RECAP

Person NAR	ı Neal A. Ramee	Level PARTNER	Hours 0.10	Rate \$235.00	Amount \$23.50
SGR	Stephen G. Rawson	PARTNER	8.10	\$235.00	\$1,903.50
		Total Professional Services Total Current Charges for			\$1,927.00 \$1,927.00

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RE:	000030	General Personnel	

SERVICES

Date	Person	Description of Services	Hours	
11/1/2023	SGR	Telephone conference with opposing counsel re negotiation.	0.40	
11/2/2023	SGR	Revise superintendent contract and comparison chart.	0.80	
11/3/2023	SGR	Telephone conference with Womack re superintendent contract.	0.30	
11/3/2023	SGR	Finalize contract for upcoming meeting; draft emails to Board and opposing counsel re status.	0.40	
11/6/2023	SGR	Review and respond to email from Eggers re cell phone use complaint.	0.10	
11/7/2023	SGR	Telephone conferences with Womack re finalizing superintendent contract.	0.30	
11/7/2023	SGR	Telephone conference with Dossenbach re logistics for contract and swearing in.	0.20	
11/7/2023	SGR	Telephone conference with attorney for superintendent re finalizing contract.	0.40	
11/7/2023	SGR	Finalize contract and policy waiver language.	0.20	
11/7/2023	SGR	Telephone conference with Malone re superintendent oath issue.	0.10	
11/7/2023	VRM	Telephone conference with Rawson re oath of office issues.	0.10	
11/8/2023	SGR	Draft email to DPI re superintendent contract forms.	0.10	
11/9/2023	SGR	Review and respond to email from Cosimo re parental leave issue.	0.10	
11/9/2023	SGR	Telephone conference with Eggers and Cosimo re employee issue.	0.10	
11/13/2023	SGR	Telephone conference with Cosimo re leave issue.	0.10	
11/16/2023	SGR	Review and respond to emails from Eggers re cell phone use issue.	0.30	
11/27/2023	SGR	Telephone conferences with Cosimo and Eggers re investigation issue and contract issue.	0.50	
11/28/2023	SGR	Telephone conference with Eggers re employee complaint.	0.20	
11/29/2023	SGR	Review and respond to email from Eggers re teacher pay issue.	0.10	
11/30/2023	SGR	Telephone conference with Cosimo re FMLA issue.	0.10	
		Total Professional Services	4.90	\$1,151.50

PERSON RECAP

Person		Level	Hours	Rate	Amount
	V. Rod Malone	PARTNER	0.10	\$235.00	\$23.50
SGR	Stephen G. Rawson	PARTNER	4.80	\$235.00	\$1,128.00

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RE: 000030 General Personnel

Total Professional Services for this Matter \$1,151.50 **Total Current Charges for this Matter** \$1,151.50

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RE: 000031 Bond Forfeiture Matters

SERVICES

SERVICES				
Date	Person	Description of Services	Hours	
11/2/2023	JDH	Email correspondence to Webster re box 5 documentation verification in district court matter.	0.20	
11/2/2023	JDH	Review email correspondence; email correspondence to Webster re verification of box 5 motion to set aside and next steps.	0.10	
11/6/2023	JDH	Review email correspondence; email correspondence to Webster re order of abatement re district court bond matter.	0.10	
11/8/2023	JDH	Revise consent order re district court bond matter.	0.10	
11/8/2023	JDH	Email correspondence to Johnson re order of abatement and consent order in district court bond matter.	0.20	
11/8/2023	JDH	Telephone conference with Johnson (bail agent) re consent order in district court bond matter.	0.10	
11/8/2023	JDH	Review e-courts portal Odyssey re motions to set aside in district court bond matters and retrieve court documents to include served order for arrest.	0.20	
11/9/2023	JDH	Upload and e-file consent order re box 5 motion to set aside; email correspondence to Assistant Clerk Clark, Clerk Thomas and Rawson re description and envelope number in the district consent order.	0.30	
11/13/2023	JDH	Review email correspondence from Lee County Clerk's e-portal re filing accepted in district court matter.	0.10	
11/14/2023	JDH	Telephone conference with bail agent Campbell re possible box 7 motion to set aside and defendant incarceration form.	0.20	
11/15/2023	JDH	Retrieve executed/file-stamped court order from e-courts portal re district court bond matter (State v Waller).	0.10	
11/15/2023	JDH	Review e-courts portal Odyssey re motions to set aside and retrieve conditions of releases in district and superior court bond matters.	0.40	
11/15/2023	JDH	Review email correspondence; email correspondence to opposing counsel re memorandum of acceptable documentation in bond matters.	0.10	
11/16/2023	JDH	Review e-courts portal Odyssey re review motion to set aside and retrieve conditions of release in district court matter.	0.10	
11/21/2023	JDH	Revise draft correspondence for Rawson re monthly report regarding bond forfeiture matters (October 2023).	0.20	
11/21/2023	JDH	Prepare draft correspondence for Rawson re monthly report regarding bond forfeiture matters (November 2023).	0.10	
11/28/2023	JDH	Review e-courts portal Odyssey re motions to set aside in district and superior court bond matter and retrieve conditions of release.	0.60	
		Total Professional Services	3.20	\$352.00

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RE: 000031 Bond Forfeiture Matters

PERSON RECAP

Person Level Hours Rate Amount

IDH Jappifor D. Honomich PARAL EGAL 3.20 \$110.00 \$352.00

JDH Jennifer D. HonomichI PARALEGAL 3.20 \$110.00 \$352.00

Total Professional Services for this Matter \$352.00

Total Current Charges for this Matter \$352.00

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RE:	000049	General Student Discipline	

SERVICES	49 Gen	erar Student Discipline				
Date	Person	Description of Service			Hours 0.20	
11/1/2023	SGR	Telephone conference	Telephone conference with Duffey re code of conduct revision.			
11/30/2023	SGR	Telephone conference with Duffey re weapon policy. 0.2			0.20	
			Total Professional Services		0.40	\$94.00
PERSON R	ECAP					
Person			Level	Hours	Rate	Amount
SGR Ste	phen G. R	awson	PARTNER	0.40	\$235.00	\$94.00
			Total Professional Services for	or this Matter		\$94.00
			Total Current Charges for t	his Matter		\$94.00

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RE: 00005	58 Vehi	cle Forfeiture Matters				
SERVICES						
Date	Person	Description of Service	Description of Services			
11/15/2023	JDH	Review officer's affiday	vit re seizure and impoundm	nents of vehicles.	0.10	
11/20/2023	JDH	Review email correspondence; email correspondence to Dunn Malone Johnson and Pearson re pre-auction sale of seized motor vehicles re December date.			0.20	
11/28/2023	VRM	Telephone conference with Day and Honomichl re sale of vehicles, release of titles and related issues.			0.10	
			Total Professional Service	es	0.40	\$56.50
PERSON RE	CAP					
Person			Level	Hours	Rate	Amount
VRM V. Rod Malone		PARTNER	0.10	\$235.00	\$23.50	
JDH Jennifer D. Honomichl		onomichl	PARALEGAL	0.30	\$110.00	\$33.00
			Total Professional Service	es for this Matter		\$56.50
			Total Current Charges for			\$56.50

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\$517.00

RE: 00006	31 Gen	eral Policy Review				
SERVICES						
Date	Person	Description of Service	es		Hours	
11/15/2023	SGR	Review and respond to information request re contracts reviewed; review and respond to emails re policy.			0.80	
11/16/2023	SGR	Review email from Womack re policy proposal.			0.10	
11/20/2023	SGR	Telephone conference with Dossenbach re accreditation survey issue and public comment policy.		0.30		
11/20/2023	SGR	Review agenda and materials; attend policy committee meeting.		1.00		
			Total Professional Service	es	2.20	\$517.00
PERSON RE	ECAP					
Person			Level	Hours	Rate	Amount
To the state of th	phen G. R	awson	PARTNER	2.20	\$235.00	\$517.00
			Total Professional Service	es for this Matter		\$517.00

Total Current Charges for this Matter

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RE:	000063	General Contract Review	

SERVICES

Date	Person	Description of Services	Hours	
11/10/2023	SGR	Review and respond to email from Meassamer re Google contract.	0.10	
11/10/2023	SGR	Review and respond to email from Tolliver re related services contract.	0.20	
11/16/2023	SGR	Review contract from McNeill.	0.20	
11/20/2023	SGR	Review and respond to email from Dossenbach re services contract.	0.10	
11/28/2023	SGR	Review and respond to email from Dossenbach re survey issue.	0.10	
11/29/2023	SGR	Review vendor contract and respond to email from Tolliver re same.	0.30	
		Total Professional Services	1.00	\$235.00

Person SGR	TO RESIDENCE TO THE RESIDENCE OF THE PARTY O	Level PARTNER	Hours 1.00	Rate \$235.00	Amount \$235.00
	Total Professional Service Total Current Charges f			\$235.00 \$235.00	

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RE: 0000	67 Gen	eral Student Matters				
SERVICES						
Date	Person	Description of Service	es		Hours	
11/9/2023	SGR	Telephone conference	Telephone conference with Dossenbach re parent concern.		0.10	
11/20/2023	SGR	Telephone conference homebound students.	with Duffey re remote services fo	r	0.10	
			Total Professional Services		0.20	\$47.00
PERSON R	ECAP					
Person			Level	Hours	Rate	Amount
SGR Stephen G. Rawson		awson	PARTNER	0.20	\$235.00	\$47.00
			Total Professional Services for the	his Matter		\$47.00
			Total Current Charges for this	Matter		\$47.00

December 12, 2023 Client: 0133

Invoice #:

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RE: 0000	72 Gen	eral Construction Issue	S			
SERVICES						
Date	Person	Description of Servi	ces		Hours	
11/1/2023	VRM	Review and revision of RFQ; telephone confeder project.	eview and revision of RFQ; interoffice conference with Brown re 0.30 FQ; telephone conference with McNeill re RFQ – all re high school eacher project.			
11/1/2023	VRM	Review and revision of same.	Review and revision of RFQ; interoffice conference with Brown re 0.10			
11/6/2023	SGR	Review and respond to policy re same.	Review and respond to email from McNeill re bidding issue; review 0.3 policy re same.			
			Total Professional Servic	es -	0.70	\$164.50
PERSON R	ECAP					
Person			Level	Hours	Rate	Amount
VRM V. Rod Malone		PARTNER	0.40	\$235.00	\$94.00	
SGR Stephen G. Rawson		PARTNER	0.30	\$235.00	\$70.50	
			Total Professional Service	es for this Matter		\$164.50
			Total Current Charges f	or this Matter		\$164.50

SERVICES

Date	Person	Description of Service	Description of Services			
11/20/2023	MHW	Review letter of finding	gs from DPI.		0.20	
			Total Professional Services		0.20	\$42.00
PERSON RI	ECAP					
Person MHW May	ya H. Weir	nstein	Level ASSOCIATE	Hours 0.20	Rate \$210.00	Amount \$42.00
		Total Professional Services for this Matter Total Current Charges for this Matter			\$42.00 \$42.00	

December 12, 2023 Client: 0133

Invoice #:

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RE:	000999	Expenses

DISBURSEMENTS

Date	Description of Disbursements	Amount
11/6/2023	Stephen G. Rawson- Travel Auto- (77 @ \$0.655)	\$50.44
11/7/2023	Stephen G. Rawson- Travel Auto- (77 @ \$0.655)	\$50.44
11/30/2023	Thomson Reuters - West Payment Center- Westlaw Expense-	\$8.04
	Total Disbursements	\$108.92
	Total Disbursements for this Matter Total Current Charges for this Matter	\$108.92 \$108.92

December 12, 2023 Client: 013334 Invoice #: 511219

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Total Services \$4,586.50
Total Disbursements \$108.92

 Total Current Charges
 \$4,695.42

 Previous Balance
 \$9,250.55

 Less Payments
 \$9,250.55

 PAY THIS AMOUNT
 \$4,695.42

Payments received after the invoice date are not reflected on this invoice.

Due Upon Receipt. A late fee of 8% per annum will be added to unpaid balances after 60 days.

Please include the invoice number on all remittance. Thank you.





P.O. Box 1151 Raleigh, N.C. 27602

Telephone: (919) 821-4711 http://www.tharringtonsmith.com Federal Tax I.D. No.: 56-0852713

Lee County Board Of Education by email to: Susan Britt, Admin Asst. to Superintendent sbritt@lee.k12.nc.us January 11, 2024

Client: 013334 Invoice #: 512539

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For Professional Services Rendered Through December 31, 2023

RE: 000000 General

SERVICES

Date	Person	Description of Services	Hours	
12/6/2023	SGR	Review and respond to emails from Britt re upcoming Board meeting.	0.10	
12/12/2023	SGR	Telephone conference with Dossenbach re meeting agenda and procedures.	0.30	
12/12/2023	SGR	Travel to and attend Board meeting.	3.60	
12/13/2023	SGR	Review and respond to email from Britt re calendar committee.	0.10	
12/14/2023	SGR	Review resolution draft from Rummel re ESL learning.	0.40	
		Total Professional Services	4.50	\$1,057.50

Person	ı	Level	Hours	Rate	Amount
SGR	Stephen G. Rawson	PARTNER	4.50	\$235.00	\$1,057.50
		Total Professional Service	ces for this Matter		
		Total Current Charges	for this Matter		\$1,057.50

Client:

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RE:	000030	General Personnel	

SERVICES

Date	Person	Description of Services	Hours	
12/8/2023	SGR	Telephone conference with Cosimo re contract issue.	0.20	
12/12/2023	SGR	Telephone conference with Cosimo re accommodations request.	0.10	
		Total Professional Services	0.30	\$70.50

Person	ſ	Level	Hours	Rate	Amount
SGR	Stephen G. Rawson	PARTNER	0.30	\$235.00	\$70.50
		Total Professional Services for this Matter			\$70.50
		Total Current Charges t	for this Matter		\$70.50

Client:

013334 Invoice #: 512539

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RE:	000031	Bond Forfeiture Matters

SERVICES

Date	Person	Description of Services	Hours	
12/6/2023	JDH	Review e-courts portal Odyssey re motions to set aside in district and superior court bond matters and retrieve court documents to include served order for arrest and conditions of release.	0.40	
12/7/2023	JDH	Review e-courts portal Odyssey re motions to set aside in district court bond matter and retrieve court documents to include served order for arrest and conditions of release.	0.10	
12/12/2023	JDH	Update spreadsheet re delegation of authority agreement and contact information for pre and post auction sale reports.	0.10	
12/14/2023	JDH	Review e-courts portal Odyssey re motions to set aside in district court bond matters and retrieve court documents to include conditions of release.	0.20	
12/18/2023	JDH	Review e-courts portal Odyssey re motions to set aside in district court bond matters and retrieve court documents to include conditions of release.	0.20	
12/19/2023	JDH	Review e-courts portal Odyssey re motions to set aside in district court bond matters and retrieve court documents to include conditions of release.	0.30	
12/19/2023	JDH	Telephone conference with Walker (bail agent) re \$10,000 district court bond matter; review e-courts portal Odyssey re same and retrieve court documents.	0.20	
12/20/2023	SGR	Meet with Honomichl re bail agent request for extension.	0.10	
12/20/2023	JDH	Interoffice conference with Rawson re \$10,000 outstanding district court bond matter.	0.10	
12/20/2023	JDH	Telephone conference with Walker (bail agent) re \$10,000 district court bond matter.	0.10	
12/21/2023	JDH	Review e-courts portal Odyssey re motions to set aside in district court bond matters and retrieve court documents to include conditions of release.	0.20	
12/28/2023	JDH	Review e-courts Odyssey re notice to plaintiff in writ of execution and retrieve court documents to include transcribe of judgment; email to Rawson re same.	0.30	
12/28/2023	JDH	Review e-courts portal Odyssey re motions to set aside in district and superior court bond matter and retrieve conditions of release.	0.20	
12/29/2023	JDH	Review e-courts portal Odyssey re motions to set aside in district court bond matters and retrieve conditions of release.	0.30	
12/29/2023	JDH	Revise draft correspondence for Rawson re monthly report regarding bond forfeiture matters (December 2023).	0.20	
12/29/2023	JDH	Revise draft correspondence for Rawson re monthly report regarding bond forfeiture matters (November 2023).	0.10	
		Total Professional Services	3.10	\$353.50

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RE: 000031 Bond Forfeiture Matters					
TE: 000001 Bond Forloadio Mattero	IRF.	000031	Rond Forfeiture Matters		
	1	000001	Bona i onoltaro mattoro		

Person	1	Level	Hours	Rate	Amount
SGR	Stephen G. Rawson	PARTNER	0.10	\$235.00	\$23.50
JDH	Jennifer D. Honomichl	PARALEGAL	3.00	\$110.00	\$330.00
		Total Professional Services for this Matter		\$353.50	
		Total Current Charges for	or this Matter		\$353.50

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RE: 0000	RE: 000049 General Student Discipline						
SERVICES							
Date	Person	Description of S	Services		Hours		
12/1/2023	SGR	Telephone confeissue.	rence with Duffey re suspensior	n recommendation	0.20		
12/7/2023	SGR	Telephone confe	rence with Duffey re surveillanc	e video issue.	0.10		
			Total Professional Service	ces	0.30	\$70.50	
PERSON RI	ECAP						
Person			Level	Hours	Rate	Amount	
SGR Ste	phen G. R	awson	PARTNER	0.30	\$235.00	\$70.50	
		Total Professional Service	ces for this Matter		\$70.50		
			Total Current Charges	for this Matter		\$70.50	

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RE: 000055 General EC							
SERVICES							
Date	Person	Description of Serv	ices		Hours		
12/4/2023	SGR	Telephone conference visit.	e with Sessoms re Disabilit	y NC monitoring	0.20		
			Total Professional Service	ces	0.20	\$47.00	
PERSON R	ECAP						
Person			Level	Hours	Rate	Amount	
SGR Ste	ephen G. R	awson	PARTNER	0.20	\$235.00	\$47.00	
		Total Professional Service	ces for this Matter		\$47.00		
			Total Current Charges	for this Matter		\$47.00	

January 11, 2024 Client: 01

Invoice #:

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RE: 0000	58 Veh	cle Forfeiture Matters				
SERVICES						
Date	Person	Description of Services			Hours	
12/12/2023	VRM	Interoffice conference with Johnso ongoing delegation issues and not vehicles.			0.10	
		Total Prof	essional Services		0.10	\$23.50
PERSON RI	ECAP					
Person		Level		Hours	Rate	Amount
VRM V. F	Rod Malon	PARTNEF	₹	0.10	\$235.00	\$23.50
		Total Prof	essional Services for this M	latter		\$23.50
		Total Cur	rent Charges for this Mat	ter		\$23.50

Client:

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RE: 00000	61 Gen	eral Policy Review				
SERVICES						
Date	Person	Description of Ser	vices		Hours	
12/11/2023	SGR	Telephone conferer guide issue.	nce with Dossenbach re studer	nt achievement	0.20	
			Total Professional Service	es	0.20	\$47.00
PERSON RI	ECAP					
Person			Level	Hours	Rate	Amount
SGR Ste	phen G. R	awson	PARTNER	0.20	\$235.00	\$47.00
			Total Professional Service	es for this Matter		\$47.00
			Total Current Charges for	or this Matter		\$47.00

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RE:	000063	General Contract Review	

SERVICES

Date	Person	Description of Services	Hours	
12/6/2023	SGR	Review CCCC CCP MOU.	0.50	
12/14/2023	SGR	Review and respond to emails from Duffy re invoice dispute with Scribbles.	0.20	
12/19/2023	SGR	Telephone conference with Womack re contract approval issue.	0.10	
		Total Professional Services	0.80	\$188.00

Person		Level	Hours	Rate	Amount
SGR	Stephen G. Rawson	PARTNER	0.80	\$235.00	\$188.00
		Total Professional Service	es for this Matter		\$188.00
		Total Current Charges	for this Matter		\$188.00

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Invoice #:

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RE: 00006	67 Gen	eral Student Matters				
SERVICES						
Date	Person	Description of Servi	ces		Hours	
12/13/2023	SGR	Review and respond	to email from Mazzola re r	ecords issues.	0.10	
12/14/2023	SGR	Telephone conference and student accomme	e with Mazzola re retention odation issues.	n schedule issues	0.50	
			Total Professional Serv	rices	0.60	\$141.00
PERSON RE	ECAP					
Person			Level	Hours	Rate	Amount
SGR Ste	phen G. R	awson	PARTNER	0.60	\$235.00	\$141.00
			Total Professional Serv	rices for this Matter		\$141.00
			Total Current Charges	s for this Matter		\$141.00

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RE:	000079	Parents Bill of Rights	

SERVICES

Date	Person	Description of Services	Hours	
12/11/2023	NAR	Attend DPI webinar on Parents Guide to Student Achievement and ask questions of panelists for clarification; review DPI guidance document and Parents Guide to Student Achievement rubric; exchange interoffice emails re same.	0.10	
		Total Professional Services	0.10	\$23.50

Person NAR Ne	eal A. Ramee	Level PARTNER	Hours 0.10	Rate \$235.00	Amount \$23.50
		Total Professional Services for this Total Current Charges for this M			\$23.50 \$23.50

January 11, 2024 Client: 013

Invoice #:

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RE:	000999	Expenses

DISBURSEMENTS

Date	Description of Disbursements	Amount
12/12/2023	Stephen G. Rawson- Travel Auto- (77 @ \$0.655)	\$50.44
12/31/2023	Thomson Reuters - West Payment Center- Westlaw Expense-	\$17.52
	Total Disbursements	\$67.96
	Total Disbursements for this Matter	\$67.96
	Total Current Charges for this Matter	\$67.96

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\$2,089.96

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Total Services \$2,022.00
Total Disbursements \$67.96

Total Current Charges \$2,089.96
Previous Balance \$4,695.42
Less Payments \$4,695.42

PAY THIS AMOUNT

Payments received after the invoice date are not reflected on this invoice.

Due Upon Receipt. A late fee of 8% per annum will be added to unpaid balances after 60 days.

Please include the invoice number on all remittance. Thank you.

October 2023 Financials

			Beginning				PO'S &		
			Budget/Beg	Budget	Current	Year-to-Date	Encumbrances	Remaining	Percent
Fund	1 digit Purpose	Description	Balance	Adjustments	Budget/Balance	Expenses	Outstanding	Balance	Spent
1	5XXX	Instructional Services	63,082,141.00		\$63,082,141.00	\$19,409,217.46	\$727,160.38	\$42,945,763.16	31.92%
	XXX9	System-Wide Support Services	6,897,820.00		\$6,897,820.00	\$2,207,326.70	\$594,005.12	\$4,096,488.18	40.61%
	7XXX	Ancillary Services	250,000.00		\$250,000.00	\$20,764.31	\$0.00	\$229,235.69	8.31%
1 Total			\$70,229,961.00	\$0.00	\$70,229,961.00	\$21,637,308.47	\$1,321,165.50	\$47,271,487.03	32.69%
2	5XXX	Instructional Services	9,336,954.00		\$9,336,954.00	\$2,599,542.54	\$332,112.67	\$6,405,298.79	31.40%
	XXX9	System-Wide Support Services	9,522,070.00		\$9,522,070.00	\$3,954,149.34	\$0.00	\$5,567,920.66	41.53%
	7XXX	Ancillary Services	100,000.00		\$100,000.00	\$63,074.75	\$10,673.40	\$26,251.85	73.75%
	8XXX	Non-Programmed Charges	1,175,000.00		\$1,175,000.00	\$212,050.20	\$0.00	\$962,949.80	18.05%
2 Total	_		\$20,134,024.00	\$0.00	\$20,134,024.00	\$6,828,816.83	\$342,786.07	\$12,962,421.10	35.62%
3	5XXX	Instructional Services	9,583,232.00		\$9,583,232.00	\$2,955,273.64	\$633,793.37	\$5,994,164.99	37.45%
	XXX9	System-Wide Support Services	1,757,320.00		\$1,757,320.00	\$1,117,035.04	\$360,920.06	\$279,364.90	84.10%
	7XXX	Ancillary Services	25,571.00	\$9,000.00	\$34,571.00	\$34,515.25	\$0.00	\$55.75	99.84%
	8XXX	Non-Programmed Charges	402,921.00		\$402,921.00	\$0.00	\$0.00	\$402,921.00	0.00%
3 Total			\$11,769,044.00	\$9,000.00	\$11,778,044.00	\$4,106,823.93	\$994,713.43	\$6,676,506.64	43.31%
4	5XXX	Instructional Services	200,000.00		\$500,000.00	\$0.00	\$11,674.17	\$488,325.83	2.33%
	XXX9	System-Wide Support Services	1,185,000.00		\$1,185,000.00	\$312,034.09	\$540,972.36	\$331,993.55	71.98%
	8XXX	Non-Programmed Charges	1		\$0.00	\$0.00	\$0.00	\$0.00	0.00%
	XXX6	Capital Outlay	1,600,500.00		\$1,600,500.00	\$0.00	\$0.00	\$1,600,500.00	0.00%
4 Total	_		\$3,285,500.00	\$0.00	\$3,285,500.00	\$312,034.09	\$552,646.53	\$2,420,819.38	26.32%
2	7XXX	Ancillary Services	5,626,875.00		\$5,626,875.00	\$1,431,349.13	\$239,255.32	\$3,956,270.55	29.69%
	8XXX	Non-Programmed Charges	325,000.00		\$325,000.00	\$0.00	\$0.00	\$325,000.00	0.00%
5 Total	_		\$5,951,875.00	\$0.00	\$5,951,875.00	\$1,431,349.13	\$239,255.32	\$4,281,270.55	28.07%
8	5XXX	Instructional Services	2,000,000.00		\$2,000,000.00	\$613,014.92	\$150,617.04	\$1,236,368.04	38.18%
	XXX9	System-Wide Support Services	350,000.00		\$350,000.00	\$110,375.46	\$34,443.98	\$205,180.56	41.38%
	7XXX	Ancillary Services	125,000.00		\$125,000.00	\$0.00	\$0.00	\$125,000.00	%00.0
8 Total			\$2,475,000.00	\$0.00	\$2,475,000.00	\$723,390.38	\$185,061.02	\$1,566,548.60	36.71%
Grand Total	ıtal		\$113,845,404.00	\$9,000.00	\$113,854,404.00	\$35,039,722.83	\$3,635,627.87	\$75,179,053.30	33.97%



Fund 1 – State

Fund 2 – Local

Fund 3 – Federal

Fund 4 – Capital Outlay

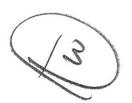
Fund 5 - Child Nutrition

Fund 8 – Special Revenue

2023-2024 Board Expenses

	SSCC SAMPLES OF STREET AND	
Patrick Kelly-70	* Registrations/Misc.	-
Tuttok Hony To	** LCBOE Sanctioned Expenditures	ū.
James Laudate-71	* Registrations/Misc.	220.00
<u> </u>	** LCBOE Sanctioned Expenditures	-
		220.00
Eric Davidson-75	* Registrations/Misc.	783.00
Eno Bariason 70	** LCBOE Sanctioned Expenditures	
		783.00
Chris Gaster-76	* Registrations/Misc.	299.91
Olino Gustor 10	** LCBOE Sanctioned Expenditures	
		299.91
Sandra Bowen-77	* Registrations/Misc.	495.00
Gandia Dowell-11	** LCBOE Sanctioned Expenditures	-
	The state of the s	495.00
Alan Rummel-78	* Registrations/Misc.	220.00
Alait Kullillei-70	** LCBOE Sanctioned Expenditures	-
		220.00
Character Managel 70	* Designations (Miles	2,038,00
Sherry Lynn Womack-79	* Registrations/Misc. ** LCBOE Sanctioned Expenditures	2,038.90
	20002 Canonica Experiance	2,038.90
	Supplies & Materials/Miss	
	Supplies & Materials/Misc.	
Misc. Expenses	NCSBA - Online Webhosting	6,150.00
	NCSBA - Video Subscription	1,500.00
	Catering - Board Retreat	368.35
	William C. Harrison - Travel Reim Board Retreat	48.47
8/9/2023	Security BOE Mtg. 7/18/23	292.20
	Security BOE Mtg 8/8/23	285.00
	Security BOE Mtg 8/17/23	37.50
	Sheraton Greensboro - S. Britt NCSBA Conf. Nov. 13-15	372.08
	NSBA Conf Registration - Nov. 13-15	495.00
	SAGA Annual Meeting	600.00 270.00
	Security BOE Mtg 9/12/23 Security BOE Mtg 10/10/23	180.00
	Travel Reim S. Britt	79.91
	P-Card Expenses	319.80
	Security BOE Mtg - 12/12	240.00
	Subtotal	11,238.31
	Castotal	
	Total Supplies & Materials/Misc.	11,238.31
	Total Budget	98,548.57
	Registration/Misc.	4,056.81
	Total Supplies & Materials/Misc.	11,238.31
	Total Expended to Date	15,295.12
	Performance Audit	12,500.00
	Salary Study	37,500.00
	Superintendent Search	22,647.86
		72,647.86

Amount Remaining



10,605.59

Patrick Kelly-70 Registrations/Misc.		LCBOE Sanctioned Expenditures	
Subtotal Total	, ,	Subtotal	
James Laudate-71 Registrations/Misc. 10/9/2023 NCSBA Annual Conf Registration	220.00	LCBOE Sanctioned Expenditures	
Subtotal Total	220.00 220.00	Subtotal	,
Eric Davidson-75 Registrations/Misc. 8/9/2023 NCSBA - Registration - SREC Lead Mtg. 10/3/2023 UNC School of Governement - Registration 11/10/2024 NCSBA Annual Conf. Registration 1/10/2024 SAGA 1/8/24	79.00 25.00 510.00 149.00 20.00	LCBOE Sanctioned Expenditures	
Subtotal Total	783.00 783.00	Subtotal	
Chris Gaster-76 Registrations/Misc. 10/2/2023 NCSBA Annual Conf Registration 12/6/2023 Travel Reim.	220.00 79.91	LCBOE Sanctioned Expenditures	
Subtotal Total	299.91 299.91	Subtotal	
Sandra Bowen-77 Registrations/Misc. 10/2/2023 NCSBA Annual Conf Registration Subtotal	495.00 495.00 495.00	LCBOE Sanctioned Expenditures Subtotal	

LCBOE Sanctioned Expenditures	Subtotal	LCBOE Sanctioned Expenditures	Subtotal					
220.00	220.00 220.00	20.00 444.09 597.00 495.00 23.00 159.82	2,038.90	12,500.00	12,500.00 12,500.00	18,750.00 18,750.00	37,500.00 37,500.00	
Alan Rummel-78 Registrations/Misc. 10/2/2023 NSBA Annual Conf Registration	Subtotal Total	Sherry Lynn Womack-79 Registrations/Misc. 8/29/2023 SAGA 9/23 10/2/2023 Four Points by Sheraton Asheville 10/2/2023 NCSBA - Law Conference Registration 10/2/2023 NCSBA Annual Conf Registration 11/2/2023 SAGA - 10/23 12/6/2023 Travel Reim. 12/6/2023 Travel Reim.	Subtotal Total	Performance Audit 7/10/2023 Evergreen Solutions LLC	Subtotal Total	Salary Study 10/3/2023 Evergreen Solutions LLC 11/8/2023 Evergreen Solutions LLC	Subtotal Total	