City of Baker School Board
Workshop Agenda
Special Board Meeting Agenda
Wednesday, August 19, 2026, 5:30 P.M.
School Board Office

Monique Butler, President – Presiding

"The beautiful thing about learning is that no one can take it away from you." - B.B. King

A special board meeting will follow the conclusion of the workshop.

Workshop Agenda-

A. Policy Discussion
   1. Property and casualty Insurance-Butler Bourgeois
   2. CBSS Helix Governance Agreement for Federal Programs
   3. Financial Governance Agreement for Federal Programs
   4. 2026 Legislative Update Policies
   5. RFA – Cooperative Endeavor Agreement Professional Services Contractor

A. Meeting Commencement
   1. Call to Order
   2. Roll Call
   3. Silent Meditation
   4. Pledge of Allegiance

B. Welcome of Visitors

C. Recognitions

D. Approval of Agenda (Action)

E. Action Items-The public may comment on Action Items. Public Comment is limited to 2 minutes per individual.
   1. Consideration and Approval of Property and Casualty Insurance renewal for the 2026-2027 school year.
   2. Consideration and Approval of CBSS Helix Governance Agreement for Federal Programs
   3. Consideration and Approval of Financial Governance Agreement for Federal Programs
   4. Consideration and Approval of RFA – Cooperative Endeavor Agreement Professional Services Contractor with ACTion Educational Services, LLC.
   5. Consideration and Approval of Attendance Improvement Specialist FTE and Job Description.

F. Information Items

G. Announcements
   1. Date of Next Meeting – September 1, 2026

H. Adjournment (Action)

In accordance with the Americans with Disabilities Act, if you need special assistance, please contact Catrina Blackmore at 225.774.5795 to describe the assistance that is necessary.

CITY OF BAKER SCHOOL SYSTEM

GOVERNANCE AGREEMENT

Federal Programs, Fiscal Claims, Special Education, English Learner, Homeless Education, Data Reporting, and Compliance Oversight

Between

City of Baker School System (CBSS)

and

Helix Community Schools

FY 2026-2027

Draft for Review and Completion Before Submission to LDOE

Prepared for CBSS review based on the existing June 2026 roles, responsibilities, and compliance oversight checklist and the Louisiana Department of Education feedback requesting a more detailed delineation of roles, actual named contacts, reimbursement workflow, IDEA/pupil appraisal responsibility, EL and homeless responsibility, fiscal oversight, and federal citations.

Table of Contents

1. Purpose and LDOE Response Summary

This Governance Agreement converts the prior CBSS/Helix roles, responsibilities, and compliance checklist into an executable agreement that identifies decision-making authority, program implementation responsibility, fiscal review responsibility, documentation requirements, monitoring cadence, corrective action procedures, and responsible personnel for each workstream.

The agreement is intended to answer LDOE feedback by documenting how CBSS will ensure adherence to federal program requirements and objectives, particularly regarding fiscal operations, and by delineating the roles of Dr. Roberts, Helix, and the contracted CPA firm.

1.1 Direct response to the LDOE concerns

LDOE concern	Agreement response
Detailed explanation of federal compliance and fiscal operations	Sections 3, 5, 10, and 11 establish reserved CBSS authority, approval steps, documentation standards, financial review, reimbursement controls, records, monitoring, and enforcement.
Clear role for Dr. Roberts	Section 4 designates Dr. Roberts as the CBSS compliance coordination lead, subject to final title confirmation by CBSS.
Clear role for Helix	Sections 3, 5, 6, 7, 8, 9, and Appendix A define Helix as the implementer and documentation submitter for daily operations and student services.
Clear role for contracted CPA firm	Sections 4 and 5 define the CPA role as fiscal source-document, coding, drawdown support, reimbursement support, internal control, and audit-readiness review; final legal and programmatic approval remains with CBSS.
Reimbursement claims submitted by Helix	Section 5 and Appendix B create a step-by-step claim packet and approval workflow before CBSS submits any claim to LDOE.
IDEA: IEP Facilitator, IEP accuracy, pupil appraisal team	Section 7 creates a named IDEA chain of responsibility and workflow for child find, evaluations, eligibility, IEP development, service delivery, progress monitoring, discipline removals, and monthly documentation.
Homeless and English Learner responsibilities	Sections 8 and 9 create named responsible parties and workflows for EL identification, parent notification, services, homeless identification, immediate enrollment, transportation coordination, liaison logs, and CBSS oversight.
Actual names for every workstream	Section 4 and Appendix A require named contacts. Names not confirmed from the uploaded materials are shown as bracketed fields for CBSS completion before final submission.
Federal citations	Appendix D ties each major area to federal/state authority, including Uniform Guidance, IDEA, ESEA/ESSA, Title III, McKinney-Vento, and Louisiana charter oversight authority.

2. Parties, Term, and Authority

2.1 Parties

This Governance Agreement is entered into by and between the City of Baker School System (CBSS), acting as the Local Education Agency and local charter authorizer, and Helix Community Schools (Helix), acting as the operator of the applicable Type III charter school(s) under contract with CBSS.

2.2 Term

The term of this Governance Agreement is July 1, 2026 through June 30, 2030, unless extended, modified, or terminated in writing by CBSS and Helix, or unless a different effective date is inserted below.

Effective date	End date	Renewal / amendment method
July 1, 2026	June 30, 2030	Written amendment approved by authorized representatives of CBSS and Helix.

2.3 Governing relationship

CBSS retains final governance, fiscal, programmatic, reporting, monitoring, and compliance authority for federal and state programs administered through CBSS. Helix is responsible for daily implementation, student service delivery, documentation, staff coordination, and timely submission of records to CBSS for review and approval.

2.4 Incorporation of existing materials

The prior CBSS/Helix compliance checklist and SOP materials are incorporated as operational guidance to the extent they do not conflict with this Governance Agreement. If a conflict exists, this Governance Agreement controls unless CBSS issues a written amendment.

3. Governance Structure and Reserved LEA Authority

3.1 CBSS reserved authority

- CBSS retains final authority over federal program applications, budgets, budget amendments, allowability determinations, reimbursements, drawdowns, fiscal coding, LDOE submissions, and required assurances.

- CBSS retains final responsibility for compliance with federal program requirements, including Title I, Title II, Title III/EL, Title IV, IDEA, McKinney-Vento, ESSER or other federal recovery funds, Perkins/CTE if applicable, CLSD if applicable, and other programs administered through CBSS.
- CBSS retains authority to require documentation, inspect records, review student service data, request corrective action, withhold or deny reimbursement, impose increased monitoring, and notify LDOE or other authorities when required.
- CBSS retains final responsibility for state and federal reporting, including SIS, PEP, TSDL, EdLink, special education, EL, homeless, discipline, fiscal, and other reporting required by LDOE or federal authorities.
- CBSS owns and controls all fixed assets purchased with public funds to the extent required by grant terms, state law, board policy, and federal regulations.

3.2 Helix implementation responsibility

- Helix implements approved programs and services at the school level according to CBSS policies, approved budgets, grant requirements, student plans, and applicable federal/state rules.
- Helix must submit complete, accurate, and timely documentation to CBSS under the monthly, quarterly, annual, and immediate notification timelines in this agreement.
- Helix must make staff, records, student service documentation, fiscal records, procurement records, inventory records, and data systems available to CBSS, the contracted CPA firm when authorized by CBSS, LDOE, auditors, and other authorized reviewers.
- Helix must not submit reimbursement claims, grant claims, fiscal reports, federal program amendments, or official compliance responses directly to LDOE unless CBSS provides written authorization.

3.3 Non-delegable compliance responsibility

The parties acknowledge that daily implementation tasks may be performed by Helix, and fiscal review tasks may be supported by the contracted CPA firm, but CBSS does not waive or delegate final LEA authority for programmatic approval, fiscal approval, reporting, and compliance certification.

4. Named Responsible Parties and Role Matrix

The following named contacts are required so LDOE, CBSS, Helix, and auditors can identify who is responsible for each workstream. Bracketed fields must be completed before final submission.

Role / Workstream	Named person or entity	Primary responsibility	Final approval / escalation
CBSS Superintendent / LEA Executive Authority	JT Stroder, Superintendent	Overall LEA authority, final executive oversight, escalation to Board/attorney/LDOE as appropriate.	CBSS Superintendent
CBSS Compliance Coordination Lead	Dr. Kartina Roberts	Coordinates implementation of this agreement, tracks compliance calendar, convenes monthly reviews, follows up on corrective actions, and ensures workstreams are moving to closure.	CBSS Superintendent
CBSS Federal Programs Director / Designee	Dr. Kartina Roberts	Programmatic review for federal program alignment, allowability, required evidence, LDOE submissions, and corrective action tracking.	CBSS Superintendent or designee
CBSS Business Office / Finance Lead	Ashley Elisar	Accounting, budget coding, purchase order alignment, vendor/payment support, reimbursement preparation, and fiscal records.	CBSS Superintendent or designee
Contracted CPA Firm	Ericksen-Krentel	Independent fiscal support, documentation review, coding support, internal-control review, reimbursement packet review, audit-readiness support, and reconciliation support.	CBSS retains final approval
Helix Authorized Representative	[INSERT NAME/TITLE]	Certifies completeness and accuracy of Helix submissions and resolves operational issues.	CBSS Superintendent / designee
Helix Federal Programs Contact	[INSERT NAME/TITLE]	Coordinates Title I, Title II, Title III/EL, Title IV, ESSER, CLSD, and related documentation from Helix to CBSS.	CBSS Federal Programs Director / designee
IEP Facilitator / SPED Lead	[INSERT NAME/TITLE]	Schedules and facilitates IEP meetings, verifies IEP accuracy, monitors service logs, coordinates with pupil appraisal/evaluation team, and submits IDEA evidence.	CBSS SPED Supervisor / designee
Pupil Appraisal / Evaluation Lead	[INSERT NAME/TITLE]	Coordinates evaluations, eligibility, re-evaluations, timelines, and assessment documentation.	CBSS SPED Supervisor / designee
EL Coordinator / Lead	[INSERT NAME/TITLE]	Coordinates Home Language Surveys, screening, identification, LIEP/service documentation, parent notification, and EL progress evidence.	CBSS Federal Programs Director / EL designee
Homeless Liaison / McKinney-Vento Lead	Latoya Belin	Coordinates homeless identification, immediate enrollment support, transportation coordination, family outreach, dispute documentation, and liaison logs.	CBSS Homeless Liaison / designee
Data Reporting Lead	[INSERT NAME/TITLE]	Maintains SIS/EdLink/PEP/TSDL and related data accuracy; submits monthly data-error certifications to CBSS.	CBSS Data Manager / designee
HR / Staffing Credential Lead	[INSERT NAME/TITLE]	Maintains staff roster, credentials, job descriptions, time and effort certification support, background checks, and required HR evidence.	CBSS HR / Superintendent designee

4.1 Role of Dr. Roberts

Dr. Roberts shall serve as CBSS compliance coordination lead for purposes of this agreement unless CBSS designates another individual in writing. This role is coordination and oversight-support, not a waiver of CBSS Superintendent or Board authority.

- Maintain the master implementation calendar and LDOE response tracker.
- Coordinate monthly CBSS/Helix compliance meetings and collect status updates from each workstream lead.
- Confirm that Helix and CBSS staff understand required documentation, deadlines, and corrective actions.
- Track unresolved items and elevate any missed deadline, missing documentation, or risk of noncompliance to the Superintendent and appropriate CBSS workstream lead.
- Coordinate with the contracted CPA firm on fiscal documentation status, without substituting for programmatic approval by CBSS or fiscal approval by CBSS.

4.2 Role of the contracted CPA firm

The contracted CPA firm shall support CBSS in fiscal documentation, reimbursement review, reconciliation, internal controls, and audit-readiness. The CPA firm may recommend corrections or identify support gaps, but the CPA firm does not certify programmatic allowability or submit claims to LDOE unless CBSS gives written authorization.

- Review reimbursement packets for source documentation, mathematical accuracy, object/function coding support, budget alignment, payment support, and reconciliation to CBSS accounting records.
- Review documentation for Uniform Guidance requirements, including financial management, internal controls, procurement support, allowability, and record retention.
- Prepare a fiscal review note for each claim packet stating whether support is complete, incomplete, or requires correction before CBSS submission.
- Assist CBSS with audit-readiness and monitoring responses, including evidence indexes and fiscal crosswalks.

4.3 Role of Helix

Helix is responsible for daily implementation and first-level documentation. Helix must designate named contacts for each workstream and must certify that each submission is complete, accurate, and supported by contemporaneous source records.

5. Fiscal Operations and Reimbursement Claims Workflow

5.1 General rule

No federal reimbursement claim may be submitted to LDOE until the required Helix documentation is complete, CBSS has reviewed programmatic allowability, the CBSS Business Office and/or contracted CPA firm has reviewed fiscal support, and the CBSS authorized approver has approved submission.

5.2 Reimbursement claim workflow

1. Helix prepares the claim packet using the CBSS-required template and uploads all source documentation to the CBSS-designated shared drive by the established deadline.
2. Helix Authorized Representative certifies the packet for completeness, accuracy, and alignment with approved activities and approved budget codes.
3. CBSS Federal Programs Director / designee reviews the packet for programmatic allowability, grant alignment, required activity evidence, and program documentation.
4. CBSS Business Office reviews purchase order, invoice, proof of payment, accounting code, object/function code, vendor, payroll, and budget-to-actual support.
5. Contracted CPA firm reviews the fiscal documentation, source records, coding support, reconciliation, allowability indicators, and audit-readiness status and issues a fiscal review note.
6. CBSS resolves all exceptions. If a packet is incomplete or noncompliant, CBSS returns it to Helix for correction and may deny or withhold reimbursement until corrected.
7. CBSS Superintendent or authorized designee gives final approval for submission.
8. CBSS submits the claim or reimbursement request to LDOE. Helix shall not submit directly to LDOE unless CBSS provides written authorization.
9. CBSS retains the final claim packet, review notes, approval evidence, LDOE submission confirmation, payment/drawdown evidence, and any follow-up communication in the grant file.

5.3 Minimum reimbursement packet components

Packet component	Required evidence
Claim summary	Program, grant year, budget code, object/function code, amount, school/site, activity description, and requested reimbursement amount.
Programmatic support	Approved plan, approved budget line, activity evidence, participant lists/sign-ins when applicable, service logs when applicable, and explanation of connection to grant objective.
Procurement support	Purchase requisition/PO, quotes/bids or procurement justification, contract, vendor selection notes, debarment/suspension check if required, and board or superintendent approval if required.
Invoice/payment support	Invoice, receiving documentation, proof of payment, check/EFT record, payment date, account coding, and vendor record.
Payroll support	Payroll register, employee list, pay dates, pay codes, time and effort certification/PAR, contract or stipend approval, and benefit calculation support.
Inventory support	Asset tag, serial number, location, photo, inventory log update, custodian, and funding source for

	equipment or controlled assets.
CPA fiscal review note	Complete/incomplete status, fiscal exceptions, coding concerns, reconciliation status, and recommendation for correction or submission.
CBSS final approval	Signature or electronic approval by authorized CBSS approver before LDOE submission.

5.4 Noncompliant or unsupported costs

CBSS may reject, withhold, deny, or delay reimbursement for any cost that is unsupported, not allowable, not reasonable, not allocable, not properly coded, not approved in advance when required, inconsistent with CBSS policy, inconsistent with the approved grant budget, or not submitted according to this agreement.

6. Federal Programs Implementation and Documentation

Helix shall implement federal programs only according to CBSS-approved plans, budgets, policies, and written instructions. CBSS retains final authority for applications, amendments, assurances, and LDOE submissions.

Program area	Helix implementation/documentation duty	CBSS review/approval duty
Title I, Part A	Comprehensive Needs Assessment, schoolwide plan evidence, intervention documentation, parent/family engagement evidence, annual meeting evidence, parent compact/policy distribution, and required parent notices.	Approve plan and budget, review evidence, verify parent/family engagement, approve reimbursement, and submit required state/federal reports.
Title II, Part A	Stakeholder engagement evidence, professional development logs, agendas, sign-ins, materials, evaluation evidence, and data-driven planning evidence.	Approve PD priorities, verify alignment to needs, review stakeholder evidence, and approve claims.
Title III / EL	Home Language Surveys, screening, identification, service logs, parent notification, parent refusal documentation, EL-certified oversight evidence, and progress documentation.	Verify identification and service model compliance, review parent notifications, review data reporting, and approve claims.
Title IV, Part A	Evidence for approved well-rounded education, safe/healthy student, or effective technology activities and required documentation.	Approve activities and verify alignment to approved plan and federal requirements.
ESSER / Recovery Funds if applicable	Evidence-based intervention documentation, needs assessment support, expenditure evidence, inventory, and implementation evidence.	Verify allowable use, prior approvals, documentation, inventory, and reporting.
CLSD / Literacy if applicable	Literacy implementation evidence, allowable expenditure support, progress monitoring, and required reports.	Approve/monitor literacy plan, review implementation evidence, and approve claims.
Perkins / CTE if applicable	CTE equipment inventory, photos/tags, program of study documentation, teacher credentials, and expenditure support.	Verify plan alignment, inventory controls, and allowable cost support.
Nonpublic Equitable Services	Provide CBSS with residency/attendance data and support documentation as requested. Helix shall not manage NES budgets/services unless CBSS directs in writing.	Conduct consultation, calculate proportional share, manage NES budget/services, and maintain official documentation.

6.1 Monthly submission deadline

Unless CBSS provides a different written deadline, Helix must submit monthly federal program and fiscal documentation by the 5th business day of each month. IDEA service documentation is due by the 10th calendar day of each month unless a different CBSS deadline is issued.

7. Special Education / IDEA, IEP, and Pupil Appraisal Workflow

7.1 Non-delegable IDEA oversight

CBSS retains LEA/public agency responsibility for IDEA oversight, including FAPE, child find, evaluations, eligibility, IEP compliance, service delivery oversight, discipline protections, state reporting, and corrective action. Helix implements services and maintains required documentation at the school level.

7.2 Required named IDEA contacts

IDEA function	Required named contact	Backup contact	CBSS escalation
IEP Facilitator / IEP accuracy lead	[INSERT NAME/TITLE]	[INSERT NAME/TITLE]	CBSS SPED Supervisor / designee
Pupil Appraisal / Evaluation lead	[INSERT NAME/TITLE]	[INSERT NAME/TITLE]	CBSS SPED Supervisor / designee
Related services coordinator	[INSERT NAME/TITLE]	[INSERT NAME/TITLE]	CBSS SPED Supervisor / designee
Service log reviewer	[INSERT NAME/TITLE]	[INSERT NAME/TITLE]	CBSS SPED Supervisor / designee
Discipline / manifestation determination contact	[INSERT NAME/TITLE]	[INSERT NAME/TITLE]	CBSS SPED Supervisor / designee

7.3 IDEA workflow

1. Child Find / referral: Helix staff identify suspected disabilities and immediately refer concerns to the named IEP Facilitator and CBSS SPED designee according to CBSS procedures.
2. Evaluation / pupil appraisal: The Pupil Appraisal / Evaluation Lead coordinates evaluation timelines, consent documentation, assessment completion, and eligibility documentation with CBSS oversight.
3. Eligibility: Eligibility decisions are documented by the properly constituted team and submitted to CBSS for review and records compliance.
4. IEP meeting: The IEP Facilitator schedules meetings, ensures required participants, parent notices, interpreters/translation when needed, and CBSS representative participation when required.

5. IEP accuracy review: Before finalization, the IEP Facilitator verifies present levels, goals, accommodations, services, minutes, related services, placement, signatures, and implementation dates.
6. Service delivery: Helix ensures services are provided as written, accommodations/modifications are implemented, and missed services are documented and corrected.
7. Service logs and progress monitoring: Helix submits signed/digital service logs, progress monitoring, related service evidence, and compensatory service documentation to CBSS monthly.
8. Discipline and removals: Helix notifies CBSS within 24 hours of any removal, suspension, expulsion, manifestation determination meeting, or potential change of placement involving a student with a disability.
9. CBSS review: CBSS reviews monthly logs, timelines, discipline data, and IEP implementation evidence and issues corrective action when needed.
10. Corrective action: Helix must correct documentation or service delivery issues within 10 business days unless CBSS establishes a shorter timeline due to student service risk or legal deadline.

7.4 Required monthly IDEA evidence

- IEP service logs signed/digital-certified by provider and reviewed by the IEP Facilitator.
- Progress monitoring aligned to IEP goals.
- Related service logs and provider notes.
- FBA/BIP updates when applicable.
- Compensatory service logs when applicable.
- Discipline removals, suspensions, expulsions, manifestation determinations, and change-of-placement reviews.
- SPED staffing credentials and vacancy/substitute coverage documentation.
- Evaluation, eligibility, annual review, and re-evaluation timeline status.

8. English Learner Services Workflow

Helix must identify, serve, document, and report English Learner needs under CBSS oversight. CBSS retains final authority for EL program model approval, compliance review, state/federal reporting, and corrective action.

8.1 Required named EL contacts

EL function	Required named contact	Monthly evidence
EL Coordinator / Lead	[INSERT NAME/TITLE]	EL roster, HLS status, screening status, service logs, parent notices, refusal forms, progress evidence.
School data contact	[INSERT NAME/TITLE]	SIS/EdLink EL data verification and error corrections.
Parent notification contact	[INSERT NAME/TITLE]	Notification dates, language access, interpreter/translation evidence.

8.2 EL workflow

1. Home Language Survey collected for each newly enrolled student and reviewed promptly by Helix.
2. Potential EL students are screened using the CBSS-approved process within required timelines.
3. EL identification and LIEP/service placement are documented in the student record and data system.
4. Parents receive required notification in an understandable format and, to the extent practicable, in a language they can understand.
5. EL services, accommodations, progress monitoring, and parent refusals are documented and submitted to CBSS monthly.
6. CBSS reviews EL data and documentation monthly and directs corrections when records, services, or data are incomplete.

9. Homeless Education / McKinney-Vento Workflow

Helix must promptly identify and support students experiencing homelessness and must coordinate with the CBSS Homeless Liaison. CBSS retains oversight responsibility for policy, liaison coordination, dispute resolution, data reporting, and compliance monitoring.

9.1 Required named homeless contacts

Homeless function	Required named contact	Monthly evidence
CBSS Homeless Liaison	Dr. Kartina Roberts	District liaison logs, training, dispute records, transportation coordination, state/federal reporting.
Helix Homeless Lead	Latoya Belin	Identification/referral logs, enrollment support, outreach evidence, weekly liaison logs, transportation requests.
Transportation coordination contact	[INSERT NAME/TITLE]	Transportation requests, approvals, route coordination, cost support.

9.2 Homeless workflow

1. Helix identifies possible homeless students through enrollment, staff referral, family/student disclosure, attendance patterns, or outreach.

2. Helix immediately notifies the CBSS Homeless Liaison and submits the required referral/intake documentation.
3. Students are enrolled and served without delay while documentation, residency, or dispute matters are resolved.
4. Transportation, school stability, supplies, academic supports, and referrals are coordinated with the CBSS Homeless Liaison.
5. Helix maintains weekly liaison logs and submits monthly evidence to CBSS.
6. CBSS reviews identification, enrollment, services, disputes, transportation, and data reporting monthly and issues corrective action if needed.

10. Data Reporting, Records, and Access

10.1 Data reporting

Helix must maintain accurate, timely, and auditable student, personnel, program, fiscal, attendance, discipline, special education, EL, homeless, and assessment data. CBSS retains ownership and final reporting authority for official submissions.

- Helix must provide SIS, PEP, TSDL, EdLink, attendance, discipline, EL, SPED, homeless, and program records according to CBSS timelines.
- Helix must correct data errors within the timeline required by CBSS or LDOE.
- Helix must submit a monthly data certification identifying known errors, corrections made, and unresolved issues.
- CBSS may directly inspect systems, records, or reports to verify data accuracy.

10.2 Record access and retention

Helix must provide CBSS, LDOE, auditors, the contracted CPA firm when authorized by CBSS, and other authorized reviewers prompt access to all fiscal, programmatic, student service, personnel, inventory, and data records needed for monitoring, claims review, audits, investigations, or corrective action. Records must be retained according to applicable federal/state law, grant terms, CBSS policy, and any litigation, audit, investigation, or monitoring hold.

10.3 Documentation standards

- All documentation must be complete, accurate, dated, legible, and tied to the relevant student, employee, vendor, asset, activity, grant, budget code, and time period.
- Electronic submissions must use CBSS naming conventions and be uploaded to the CBSS-designated shared drive or system.
- If documentation is missing or incomplete, Helix must provide a written explanation and corrective action plan within the timeline set by CBSS.

11. Monitoring Cycle, Corrective Action, and Enforcement

11.1 Monitoring cadence

Review type	Frequency	Required activity	Written output
Monthly compliance review	Monthly	Review fiscal, programmatic, IDEA, EL, homeless, data, HR, inventory, and corrective action evidence.	Monthly monitoring note or dashboard.
Quarterly deep-dive review	Quarterly	Review higher-risk samples, reimbursement packets, service logs, data accuracy, inventory, and unresolved findings.	Quarterly compliance report.
Annual compliance review	Annually by June 30	Full year-end review of program implementation, fiscal support, student service documentation, data reporting, and record retention.	Annual compliance report.
Targeted review	As needed	Triggered by complaints, missing documentation, fiscal concern, service delivery concern, LDOE request, audit finding, data error, or student risk.	Targeted review memo, corrective action notice, or escalation notice.

11.2 Corrective action process

1. CBSS issues a written notice identifying the concern, required corrective action, evidence required, responsible party, and deadline.
2. Helix must acknowledge receipt within 2 business days unless a shorter timeline is required due to student service, safety, fiscal, or legal risk.
3. Helix must submit corrections within 10 business days unless CBSS sets a shorter or longer deadline in writing.
4. CBSS reviews corrections within 5 business days when practicable and either closes the item, requests additional correction, escalates monitoring, or imposes an enforcement action.
5. Repeated or unresolved noncompliance may result in increased monitoring, denial/withholding of reimbursement, suspension of spending authority, LDOE notification, contract remedies, or other action permitted by law, board policy, or contract.

11.3 Immediate notification events

Helix must notify CBSS within 24 hours of any of the following events:

- SPED discipline removal, manifestation determination issue, potential change of placement, or failure to provide IEP services.

- Suspected misuse of federal funds, procurement irregularity, vendor issue, questioned cost, missing asset, damaged asset, or inventory discrepancy.
- Data breach, reporting error, enrollment/data mismatch, or state reporting problem.
- Homeless enrollment barrier, transportation dispute, or family/student complaint related to rights or services.
- EL identification/service issue, parent notification issue, or language-access concern.
- Any compliance incident that could affect federal/state reporting, funding, student services, safety, or LDOE monitoring.

12. Communication Protocols and Required Meetings

12.1 Required meetings

Meeting	Participants	Minimum frequency	Required records
Federal Programs Check-In	CBSS Federal Programs Director/designee, Dr. Roberts, Helix Federal Programs Contact, CPA firm as needed, relevant workstream leads.	Monthly	Agenda, sign-in/attendance, notes, action items, deadlines.
Fiscal Claims Review	CBSS Business Office, Federal Programs, CPA firm, Helix fiscal/program contact.	Monthly or before each claim	Claim packet, fiscal review note, exceptions log, approval record.
IDEA/SPED Compliance Review	CBSS SPED lead, IEP Facilitator, pupil appraisal lead, Helix SPED team.	Monthly	Service log review, timelines report, discipline report, corrective actions.
EL/Homeless/Data Review	CBSS and Helix EL, homeless, and data leads.	Monthly	Rosters, referrals, parent notices, liaison logs, data validation report.
Quarterly Charter Compliance Meeting	CBSS leadership, Helix leadership, Dr. Roberts, CPA firm as needed, workstream leads.	Quarterly	Quarterly compliance report and corrective action status.

12.2 Written communication and submission method

- All official submissions must be uploaded to the CBSS-designated shared drive or system and confirmed by email.
- Emails transmitting compliance documents must identify the program, school, month/period, responsible Helix contact, and whether the submission is original, correction, or resubmission.
- CBSS feedback, corrective action notices, claim exceptions, and final approvals must be documented in writing.
- The parties must maintain a central compliance tracker showing status, owner, deadline, and evidence location for each item.

13. Signatures

By signing below, the parties agree to the roles, responsibilities, timelines, documentation standards, monitoring procedures, and corrective action/enforcement provisions in this Governance Agreement. Signatures should be added only after all bracketed fields are completed and reviewed by CBSS leadership and counsel as appropriate.

City of Baker School System	Helix Community Schools
Authorized signature: ________________________________ Printed name/title: JT Stroder, Superintendent Date: ___________________	Authorized signature: ________________________________ Printed name/title: _________________________________ Date: ___________________
CBSS Federal Programs / Compliance: ____________________ Printed name/title: _________________________________ Date: ___________________	Helix Federal Programs / Compliance: __________________ Printed name/title: _________________________________ Date: ___________________
CBSS Business Office / Fiscal: _________________________ Printed name/title: _________________________________ Date: ___________________	Helix Fiscal / Operations: _____________________________ Printed name/title: _________________________________ Date: ___________________
Contracted CPA Firm Acknowledgment: ____________________ Firm/contact: ____ Date: ___________________	Dr. Roberts Acknowledgment: __________________________ Full name/title: _____________________________________ Date: ___________________

Appendix A: Detailed Responsibility Matrix

This matrix should be completed with actual names, titles, emails, and telephone numbers before final submission. It is intentionally detailed so the agency can identify who is responsible for each workstream.

Workstream	CBSS owner	Helix owner	Support / monitoring	Key accountability
Federal programs governance	CBSS Superintendent / Federal Programs Director	Helix Federal Programs Contact	Dr. Roberts	Final approval of plans, applications, amendments, and LDOE submissions.
Fiscal management	CBSS Business Office	Helix Fiscal Contact	CPA Firm	Budget coding, PO/invoice/payment support, reconciliation, and fiscal exception review.
Reimbursement claims	CBSS Federal Programs + Business Office	Helix Authorized Representative	CPA Firm	No LDOE submission until CBSS final approval.
Procurement	CBSS Business Office / Procurement Lead	Helix Operations/Fiscal Contact	CPA Firm	Quotes/bids/sole-source/contract support must be in packet before reimbursement.
Time and effort	CBSS Federal Programs + Business Office	Helix HR/Fiscal Contact	CPA Firm	PARs or certifications for federally funded staff required before payroll reimbursement.
Fixed assets/inventory	CBSS Business Office / Asset Lead	Helix Asset Custodian	CPA Firm as needed	Tags, photos, serials, location, custodian, inventory updates, missing/damaged reports.
IDEA - Child Find	CBSS SPED Supervisor / designee	IEP Facilitator	Dr. Roberts tracks status	Referrals and timelines monitored monthly.
IDEA - Evaluations/pupil appraisal	CBSS SPED Supervisor / Pupil Appraisal Lead	Helix IEP Facilitator	Dr. Roberts tracks status	Evaluations, eligibility, and re-evaluation documentation.
IDEA - IEP development	CBSS SPED Supervisor / designee	IEP Facilitator	Dr. Roberts tracks status	IEP meetings, parent notices, required participants, IEP accuracy review.
IDEA - Service delivery	CBSS SPED Supervisor / designee	Helix SPED providers	Dr. Roberts tracks status	Service logs, progress monitoring, missed services, compensatory services.
IDEA - Discipline	CBSS SPED Supervisor / discipline designee	Helix Discipline/SPED Contact	Dr. Roberts tracks status	24-hour notice for removals, MDR, failure to provide services, or potential change of placement.
English Learners	CBSS EL/Federal Programs designee	Helix EL Lead	Dr. Roberts tracks status	HLS, screening, identification, parent notices, LIEP, service logs, refusal forms.
Homeless education	CBSS Homeless Liaison	Helix Homeless Lead	Dr. Roberts tracks status	Identification, immediate enrollment, transportation, outreach, dispute records, liaison logs.
Data reporting	CBSS Data Manager / designee	Helix Data Lead	Dr. Roberts tracks status	SIS/EdLink/PEP/TSDL, attendance, discipline, SPED, EL, homeless, program data.
HR/staff credentials	CBSS HR / Superintendent designee	Helix HR Contact	Dr. Roberts tracks status	Staff rosters, credentials, background checks, vacancy coverage, federally funded staff records.
Parent/family engagement	CBSS Federal Programs Director/designee	Helix Family Engagement Contact	Dr. Roberts tracks status	Agendas, sign-ins, notices, meeting materials, communication logs.
Corrective action	CBSS Superintendent / Federal Programs Director/designee	Helix Authorized Representative	Dr. Roberts	CAP notice, evidence, deadlines, closure or escalation.

Appendix B: Reimbursement Claims Checklist

Each reimbursement packet must include the following. CBSS should not submit the claim to LDOE until all applicable items are complete or a written exception is approved by CBSS.

Required item	Minimum documentation
Claim summary sheet	Program, year, account code, object/function code, amount, school/site, activity, certification.
Approved budget line	Evidence expenditure is included in approved grant budget or approved amendment.
Programmatic justification	Explanation of why the cost is necessary, reasonable, allocable, and connected to approved activity.
Procurement record	Requisition, PO, quotes/bids, sole-source justification if applicable, contract, vendor selection.
Invoice and receiving	Invoice, packing slip/receiving record, delivery date, acceptance record.
Proof of payment	Check/EFT/payment record, payment date, vendor record, account code.
Payroll support	Payroll register, staff list, pay code, pay date, time and effort, contract/stipend approval, benefit calculation.
Inventory evidence	Asset tag, serial number, photo, location, custodian, inventory log, funding source.
Helix certification	Signed/electronic certification by Helix Authorized Representative.
Programmatic review	CBSS Federal Programs Director/designee signs off or identifies exceptions.
Fiscal review	CBSS Business Office and/or CPA firm review note included.
Final approval	CBSS Superintendent/designee approval before LDOE submission.
Submission evidence	LDOE claim submission confirmation and any follow-up correspondence retained.

Appendix C: Monthly Evidence Submission Checklist

Area	Due date	Required monthly evidence
Fiscal	5th business day	Payroll docs, time/effort, POs, invoices, proof of payment, procurement docs, contracts, inventory, budget-to-actual.
Title I	5th business day	Schoolwide plan evidence, intervention logs, parent/family engagement, notices, annual meeting evidence, compact/policy evidence.
Title II	5th business day	Stakeholder engagement, PD agendas/sign-ins/materials, data-driven planning, evaluation evidence.
Title III / EL	5th business day	HLS, screening/identification, LIEP/service logs, parent notices, refusal forms, progress evidence.
Homeless	5th business day	Identification/referral logs, liaison logs, enrollment support, transportation docs,

		outreach, dispute docs.
IDEA/SPED	10th calendar day unless CBSS changes	IEP service logs, progress monitoring, discipline removals, FBA/BIP, compensatory services, evaluations/eligibility timelines, staffing credentials.
Data reporting	Monthly	SIS/EdLink/PEP/TSDL reports, attendance, discipline, SPED, EL, homeless data validation and correction log.
Inventory/assets	Monthly updates and January/June verification	Tagged assets, photos, serials, location/custodian, missing/damaged items, disposal approval.
Corrective action	As assigned	Evidence of correction, responsible party, date completed, CBSS closure or further action.

Appendix D: Federal and State Authority Crosswalk

This appendix lists key authorities that support the agreement. It is not intended to be an exhaustive legal index. CBSS should confirm program-specific requirements in the applicable grant award, LDOE guidance, board policy, and current federal/state rules before final approval.

Area	Requirement used in agreement	Official source
Louisiana Type III charter oversight	Louisiana Department of Education charter authorization guidance states that oversight for Type 1, 3, and 3B charter schools lies with the local district by which the schools are authorized.	LDOE Charter School Authorization: https://doe.louisiana.gov/topic-pages/louisiana-school-choice/charter-schools/charter-school-authorization
Financial management	Federal award records must sufficiently identify source and expenditure of federal funds and be supported by source documentation.	2 CFR 200.302: https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200/subpart-D/section-200.302
Internal controls	Recipients/subrecipients must establish, document, and maintain effective internal control over the federal award.	2 CFR 200.303: https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200/subpart-D/section-200.303
Allowability of costs	Costs must be necessary, reasonable, allocable, and conform to limitations or exclusions in federal cost principles and the federal award.	2 CFR 200.403: https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200/subpart-E
Procurement standards	Uniform Guidance procurement standards are located at 2 CFR 200.317 through 200.327.	2 CFR Part 200 TOC: https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200?toc=1
Pass-through monitoring / corrective action model	Pass-through entities must monitor subrecipient activities, review financial/performance reports, and ensure corrective action when significant developments affect the subaward.	2 CFR 200.332: https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200/subpart-D/subject-group-ECFR031321e29ac5bbd/section-200.332
Record retention	Federal award records generally must be retained for three years from submission of the final financial report, with exceptions and extensions where required.	2 CFR 200.334: https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200/subpart-D/subject-group-ECFR4acc10e7e3b676f/section-200.334
IDEA FAPE	FAPE must be available to eligible children with disabilities within the state age range.	34 CFR 300.101: https://www.ecfr.gov/current/title-34/subtitle-B/chapter-III/part-300/subpart-B/subject-group-ECFR4c69ab8d340f516/section-300.101
IDEA Child Find	Policies/procedures must ensure children with disabilities are identified, located, and evaluated.	34 CFR 300.111: https://www.ecfr.gov/current/title-34/subtitle-B/chapter-III/part-300/subpart-B/subject-group-ECFRf27988d69cd5d3a/section-300.111
IEP Team	The public agency must ensure required IEP Team participants, including parents, teachers/providers, and public agency representative.	34 CFR 300.321: https://www.ecfr.gov/current/title-34/subtitle-B/chapter-III/part-300/subpart-D/subject-group-ECFR28b07e67452ed7a/section-300.321
IEP in effect	At the beginning of each school year, each public agency must have an IEP in effect for each child with a disability within its jurisdiction.	34 CFR 300.323: https://www.ecfr.gov/current/title-34/subtitle-B/chapter-III/part-300/subpart-D/subject-group-ECFR28b07e67452ed7a
IDEA discipline	IDEA discipline rules limit removals and require services after certain removal thresholds.	34 CFR Part 300 Subpart E: https://www.ecfr.gov/current/title-34/subtitle-B/chapter-III/part-300/subpart-E/subject-group-ECFRfb9aefa81a38ee9
English Learner parent notice	U.S. Department of Education guidance references ESEA Section 1112(e)(3) parent notification for EL identification and LIEP placement and requires understandable format/language to the extent practicable.	USDE English Learners and Title III Guidance: https://www.ed.gov/media/document/non-regulatory-guidance-english-learners-and-title-iii-of-esea-amended-essa-september-23-2016-55406.pdf
Title I parent/family engagement	U.S. Department of Education guidance identifies Title I, Part A parent and family engagement requirements under ESEA Section 1116.	USDE Parent and Family Engagement Guidance: https://www.ed.gov/media/document/parent-and-family-engagement-guidance-2025-109202.pdf
McKinney-Vento homeless education	The EHCY program is authorized under Title VII-B of the McKinney-Vento Act, and LEAs must address barriers to identification, enrollment, attendance, and success.	USDE EHCY Guidance: https://www.ed.gov/sites/ed/files/2020/07/160240ehcyguidanceupdated082718.pdf

Appendix E: LDOE Feedback Crosswalk

This crosswalk can be used as the cover page or attachment when sending the final agreement to LDOE. It shows exactly where the revised agreement addresses the concerns raised by LDOE.

LDOE feedback item	Where addressed	Responsible party
District must explain how it will ensure adherence to federal program requirements/objectives, especially fiscal operations.	Sections 3, 5, 6, 10, 11; Appendices B-D.	CBSS Superintendent; Federal Programs Director; Business Office; CPA firm support.
Need clear delineation of roles of Dr. Roberts, Helix, and contracted CPA firm.	Section 4; Appendix A.	CBSS Superintendent assigns/approves roles.
How will district receive and process reimbursement claims submitted by Helix?	Section 5; Appendix B.	Helix prepares/certifies; CBSS reviews/approves/submits; CPA supports fiscal review.
IDEA: who will serve as IEP Facilitator, ensure IEPs are updated/accurate, and oversee pupil appraisal team?	Section 7; Appendix A.	CBSS SPED Supervisor/designee; IEP Facilitator; Pupil Appraisal Lead.
Helix responsibilities for homeless students and English Learners, and how CBSS is involved.	Sections 8 and 9; Appendix A/C/D.	Helix EL/Homeless Leads; CBSS EL designee and Homeless Liaison.
Include actual names of CBSS/Helix staff responsible for each workstream.	Section 4 and Appendix A contain the required name fields.	CBSS must complete bracketed fields before final submission.
Include federal citations for fiscal and programmatic requirements where applicable.	Appendix D.	CBSS Federal Programs Director / counsel to verify final citation list.
Monitoring visits will evaluate the components of the agreement.	Sections 10-12 and Appendices A-C create auditable evidence, meetings, records, and corrective action artifacts.	CBSS, Helix, CPA firm, and workstream leads.

8/10/2026

SCHOOL DISTRICT FINANCIAL GOVERNANCE AND BUSINESS MANAGEMENT AGREEMENT

BETWEEN THE SCHOOL BOARD, SUPERINTENDENT, AND CONTRACTED CPA FIRM

School District: [NAME OF SCHOOL DISTRICT]
School Board: [NAME OF SCHOOL BOARD]
Superintendent: [NAME]
CPA Firm: [NAME OF CPA FIRM]
Responsible CPA: [NAME OF CPA]
Effective Date: [DATE]

I. PURPOSE

This School District Financial Governance and Business Management Agreement ("Governance Agreement") establishes the governance framework under which **[CPA FIRM NAME] ("CPA Firm")** performs the District's business-management and financial-management functions.

The parties acknowledge that the District does **not** maintain a District-employed business manager or separately employed Chief Financial Officer responsible for the District's business-management function.

The CPA Firm currently performs the District's business-management function through its professional personnel.

This Governance Agreement is intended to:

1. Establish clear responsibility for the District's financial-management function;
2. Identify the qualified CPA responsible for the CPA Firm's performance of that function;
3. Establish the relationship among the School Board, Superintendent, and CPA Firm;
4. Preserve the School Board's governmental and statutory authority;

5. Establish financial reporting and accountability requirements;
6. Establish appropriate internal-control expectations;
7. Support compliance with applicable BESE and LDOE requirements;
8. Establish enhanced oversight appropriate for a District subject to fiscal-risk or high-risk monitoring; and
9. Prevent ambiguity concerning responsibility for the District's financial-management operations.

This Governance Agreement is intended to operate in conjunction with, and not replace, any separately approved professional-services agreement, procurement document, or other legally required agreement between the District and CPA Firm.

II. GOVERNANCE PRINCIPLE

The parties expressly recognize three separate levels of responsibility:

A. School Board — GOVERNANCE AND LEGAL AUTHORITY

The School Board retains all governmental, statutory, policy-making, fiduciary, and oversight authority vested in the Board by Louisiana law, BESE requirements, and District policy.

B. Superintendent — ADMINISTRATIVE OVERSIGHT

The Superintendent is responsible for administrative oversight of the District's financial-management function and for ensuring that the Board's policies and directives are implemented.

C. CPA FIRM — PROFESSIONAL BUSINESS MANAGEMENT

The CPA Firm performs the District's day-to-day business-management and financial-management functions pursuant to the District's approved arrangement with the Firm.

The CPA Firm shall perform those functions through qualified professional personnel and under the direction and professional responsibility of the **Responsible CPA identified in this Governance Agreement**.

III. RESPONSIBLE CPA

The CPA Firm shall identify one individual who is the professional responsible for overseeing the CPA Firm's performance of the District's business-management function.

Responsible CPA: [FULL NAME]

Louisiana CPA License Number: [NUMBER]

License Status: [ACTIVE]

Additional Certification, if applicable: [CLSBA/OTHER]

The Responsible CPA shall serve as the CPA Firm's designated professional responsible for the District's business-management engagement.

The Responsible CPA is **not a District employee solely by virtue of this Governance Agreement**.

The designation is intended to establish clear professional responsibility for the business-management function performed by the CPA Firm.

The District shall maintain documentation demonstrating the Responsible CPA's applicable professional qualifications.

IV. NO SEPARATE DISTRICT BUSINESS MANAGER

The parties expressly acknowledge that:

1. The District does not employ a separate business manager;

2. The District does not employ a separate CFO performing the business-management function;

3. The CPA Firm performs the District's business-management function;

4. The Responsible CPA is identified as the qualified professional responsible for the CPA Firm's performance of that function; and

5. The School Board and Superintendent retain governmental and administrative accountability that cannot be transferred merely by contracting for professional services.

Nothing in this Governance Agreement shall be interpreted as creating a District employment position that does not otherwise exist.

V. CPA FIRM BUSINESS-MANAGEMENT RESPONSIBILITY

The CPA Firm shall be responsible for performing the District's business-management functions, including, as applicable:

Financial Accounting

- General ledger;
- Fund accounting;
- Accounts payable;
- Accounts receivable;
- Cash management;
- Bank reconciliations;
- Payroll accounting;
- Revenue accounting;

- Expenditure accounting;
- Financial statements; and
- Financial record maintenance.

Budget Management

- Annual budget preparation assistance;
- Budget monitoring;
- Budget-to-actual analysis;
- Revenue projections;
- Expenditure projections;
- Budget amendments;
- Year-end projections; and
- Identification of projected deficits or material variances.

Financial Reporting

The CPA Firm shall provide financial reports sufficient to permit the Superintendent and School Board to exercise meaningful financial oversight.

Reports shall include, as applicable:

- Monthly financial statements;
- Budget-to-actual reports;
- Cash-position reports;

- Fund-balance reports;
- Accounts payable reports;
- Accounts receivable reports;
- Grant financial reports;
- Annual financial reporting;
- LDOE financial submissions; and
- Other reports required by applicable law or District policy.

VI. SCHOOL BOARD GOVERNANCE RESPONSIBILITIES

The School Board retains responsibility for governance and oversight, including:

1. Adopting the annual District budget;
2. Approving budget amendments when required;
3. Establishing financial policies;
4. Approving expenditures and contracts as required;
5. Approving debt and financing;
6. Establishing appropriate fiscal controls;
7. Receiving and reviewing financial reports;
8. Monitoring the District's financial condition;
9. Addressing material financial risks;

10. Reviewing audit findings; and

11. Ensuring that appropriate corrective action is taken.

The School Board shall not delegate governmental authority to the CPA Firm merely by delegating financial-management functions.

VII. SUPERINTENDENT RESPONSIBILITIES

The Superintendent shall:

1. Provide administrative oversight of the CPA Firm;
2. Ensure that financial reports are presented to the Board;
3. Review material financial risks;
4. Monitor compliance with Board financial policies;
5. Direct corrective actions within administrative authority;
6. Ensure that Board directives are implemented;
7. Coordinate with the Responsible CPA concerning District financial matters; and
8. Notify the School Board of material financial concerns.

The Superintendent shall have authority to request additional financial analysis, documentation, reports, and corrective actions from the CPA Firm.

VIII. RESPONSIBLE CPA DUTIES

The Responsible CPA shall provide professional oversight of the CPA Firm's performance of the District's business-management function.

The Responsible CPA shall:

1. Oversee the District's financial-management engagement;
2. Ensure that qualified CPA Firm personnel perform assigned financial functions;
3. Review significant financial reports;
4. Advise the Superintendent concerning material financial conditions;
5. Identify material financial risks;
6. Assist the District in maintaining appropriate internal controls;
7. Coordinate responses to audits and governmental monitoring;
8. Assist with LDOE financial requirements;
9. Assist with corrective-action plans;
10. Ensure continuity of financial-management services; and
11. Serve as the primary professional contact concerning the District's business-management function.

IX. INTERNAL CONTROL GOVERNANCE

The District and CPA Firm shall maintain a system of internal controls designed to protect public funds and District assets.

The parties shall address, to the extent reasonably practicable:

- Segregation of duties;

- Authorization of expenditures;
- Purchasing controls;
- Cash receipts;
- Cash disbursements;
- Payroll;
- Bank reconciliations;
- Journal entries;
- Credit cards;
- Fixed assets;
- Inventory;
- Federal funds;
- Restricted funds; and
- Financial reporting.

Where staffing limitations or the outsourced structure prevent complete segregation of duties, the CPA Firm shall recommend appropriate compensating controls and management review.

The existence of a CPA Firm performing multiple financial functions shall not eliminate the District's obligation to maintain appropriate oversight.

X. FEDERAL AND RESTRICTED FUNDS

The CPA Firm shall maintain financial-management procedures designed to ensure that federal, state, restricted, and other designated funds are used only for authorized purposes.

Financial activity shall be:

- Properly authorized;
- Properly documented;
- Properly coded;
- Allowable under the applicable funding source;
- Allocable to the applicable program;
- Consistent with the approved budget; and
- Supported by appropriate documentation.

The CPA Firm shall coordinate with District program administrators concerning financial requirements associated with restricted and federal programs.

XI. LDOE AND BESE COMPLIANCE

The parties acknowledge that the District is responsible for compliance with applicable BESE and LDOE requirements.

The CPA Firm shall provide the professional financial-management services necessary to assist the District in meeting those requirements.

The District shall maintain documentation identifying the Responsible CPA and documenting the individual's applicable qualifications.

The District shall not represent that a CPA firm, as a corporate entity, independently satisfies a qualification applicable to an individual school business administrator unless LDOE or BESE expressly permits such treatment.

Instead, the District shall identify the qualified individual responsible for the CPA Firm's performance of the business-management function.

XII. FISCAL-RISK AND HIGH-RISK OVERSIGHT

Because the District is subject to heightened fiscal oversight, the parties establish enhanced financial governance procedures.

The CPA Firm shall provide the Superintendent and School Board with a written monthly financial report addressing:

1. Budget-to-actual activity;
2. Cash position;
3. Fund balances;
4. Significant variances;
5. Accounts payable;
6. Accounts receivable;
7. Projected year-end financial position;
8. Federal and restricted-fund activity;
9. Material internal-control concerns;
10. Audit findings and corrective actions; and
11. Other material financial risks.

Material financial risks shall be communicated to the Superintendent promptly.

The Superintendent shall communicate material risks to the School Board as appropriate.

XIII. QUARTERLY FINANCIAL GOVERNANCE REVIEW

At least quarterly, the Superintendent, School Board leadership, and Responsible CPA shall review the District's financial condition.

The review shall address:

- Financial position;
- Cash flow;
- Budget performance;
- Fund balance;
- Revenue projections;
- Expenditure projections;
- Outstanding liabilities;
- Audit findings;
- Internal controls;
- Federal funds;
- Corrective actions; and
- Fiscal-risk indicators.

The review shall be documented in the District's official records.

XIV. AUDIT AND GOVERNMENTAL MONITORING

The CPA Firm shall cooperate with:

- Louisiana Department of Education;
- Board of Elementary and Secondary Education;
- Louisiana Legislative Auditor;
- Independent auditors;
- Federal agencies;
- Federal program monitors; and
- Other authorized governmental oversight entities.

The CPA Firm shall assist the District in responding to requests for financial records and documentation.

The Responsible CPA shall participate in meetings with governmental oversight agencies when requested by the District.

XV. MATERIAL FINANCIAL EVENTS

The CPA Firm shall promptly notify the Superintendent of material events, including:

- Projected budget deficits;
- Significant cash-flow problems;
- Material unauthorized expenditures;

- Material internal-control deficiencies;
- Suspected misuse of public funds;
- Significant audit issues;
- Federal grant compliance concerns;
- Material accounting errors; or
- Other conditions that could materially affect the District's financial condition or compliance status.

The Superintendent shall determine whether the matter requires immediate notification to the School Board, legal counsel, LDOE, auditors, or another governmental authority.

Nothing in this section limits any mandatory reporting obligation imposed by law.

XVI. RECORDS AND TRANSPARENCY

District financial records remain the property of the District.

The CPA Firm shall maintain records in a manner that permits the District and authorized governmental agencies to obtain timely access.

The District shall have reasonable access to:

- General ledgers;
- Financial statements;
- Bank reconciliations;
- Supporting documentation;

- Budget records;
- Grant records;
- Audit documentation;
- Financial workpapers; and
- Other District financial records.

XVII. BOARD OVERSIGHT OF THE CPA FIRM

The School Board shall periodically review whether the CPA Firm is adequately performing the business-management function.

The review shall consider:

- Accuracy;
- Timeliness;
- Compliance;
- Internal controls;
- Audit results;
- LDOE monitoring;
- Responsiveness;
- Financial reporting;
- Corrective actions; and

- Performance of the Responsible CPA.

The Board may require corrective action when deficiencies are identified.

XVIII. CHANGE IN RESPONSIBLE CPA

If the Responsible CPA leaves the CPA Firm, loses an applicable professional qualification, becomes unable to perform the responsibilities described herein, or is otherwise replaced, the CPA Firm shall promptly notify the Superintendent.

The CPA Firm shall identify a replacement individual whose qualifications are documented before that individual assumes responsibility for the District's business-management function.

The District shall update its records and any applicable LDOE documentation accordingly.

XIX. GOVERNANCE ACCOUNTABILITY MATRIX

?

Function	**School Board**	**Superintendent**	**CPA Firm / Responsible CPA**
Adopt annual budget	**Approve**	**Recommend/Implement**	**Prepare/Advise**
Budget amendments	**Approve when required**	**Recommend**	**Prepare/Analyze**
Financial statements	**Review**	**Review**	**Prepare/Oversee**

Cash management	**Oversight**	**Oversight**	**Perform/Monitor**
Bank reconciliations	**Oversight**	**Review**	**Perform/Review**
Expenditure accounting	**Oversight**	**Administrative review**	**Perform**
Federal financial accounting	**Oversight**	**Administrative oversight**	**Perform/Monitor**
Internal controls	**E**stablish policy	**Implement**	**Recommend/Monitor**
Audit response	**Oversight**	**Coordinate**	**Prepare/Assist**
LDOE financial reporting	**Oversight**	**Coordinate**	**Prepare/Submit as authorized**
Corrective action	**Oversight**	**Implement**	**Assist/Monitor**
Financial-risk reporting	**Receive/Review**	**Receive/Act**	**Prepare**
Contract/procurement approval	**Board authority**	**Administrative authority**	**Recommend/Process**
Governmental authority	**Retained by Board**	**Retained by Superintendent**	**None unless expressly authorized**

XX. GOVERNANCE PRINCIPLE REGARDING ACCOUNTABILITY

The parties expressly acknowledge that outsourcing the District's business-management function does not outsource the School Board's governmental accountability.

The CPA Firm is responsible for performing the professional financial-management functions assigned to it.

The Superintendent is responsible for administrative oversight.

The School Board remains responsible for governance, policy, statutory authority, and oversight.

This allocation is intended to ensure that the District maintains a clear chain of accountability while utilizing a CPA firm to perform the District's business-management function.

XXI. EFFECTIVE GOVERNANCE DOCUMENT

This Governance Agreement shall be adopted by formal action of the School Board and maintained as part of the District's financial-governance records.

The Superintendent shall ensure that the Governance Agreement is reviewed periodically and updated when there is a material change in:

- LDOE or BESE requirements;
- District financial structure;
- CPA Firm responsibilities;
- Responsible CPA;
- Internal-control structure;
- Fiscal-risk status; or
- Applicable law or regulation.

XXII. ADOPTION

ADOPTED BY THE GOVERNING AUTHORITY OF [SCHOOL DISTRICT]

Resolution/Action No.: ______________________

Date Adopted: ______________________________

SCHOOL BOARD

President: __________________________________
Name: ______________________________________
Date: _______________________________________

Secretary: __________________________________
Name: ______________________________________
Date: _______________________________________

SUPERINTENDENT

Signature: __________________________________
Name: ______________________________________
Date: _______________________________________

CPA FIRM ACKNOWLEDGMENT

The CPA Firm acknowledges its understanding of the governance responsibilities and professional responsibilities established by this Agreement.

CPA Firm: __________________________________

Authorized Representative: ___________________

Title: ___________________________________

Date: ___________________________________

RESPONSIBLE CPA ACKNOWLEDGMENT

I acknowledge that I have been identified as the Responsible CPA for the CPA Firm's performance of the District's business-management function.

Name: ___________________________________

Louisiana CPA License No.: __________________

Signature: ________________________________

Date: ___________________________________

Our goal is to ensure that we meet compliance requirements including clarifying the governance agreement separate from the CPA firm's actual services / procurement agreement.

The governance document establishes the accountability framework; the services agreement establishes compensation, scope, insurance, termination, procurement terms, etc.

CBSS understands this separation is particularly useful for a high-risk district because the CBSS and the Board can show LDOE a clear governance structure and chain of accountability without creating the inaccurate impression that the CPA firm is a District employee or that the Board has delegated its governmental authority.

FORETHOUGHT CONSULTING INC.

POLICY ALERT
Keeping Tabs on School Board Policy

2026 Legislative Update — Part I

The first installment of our 2026 Legislative Update series. Ten policies have been revised in response to acts of the 2026 Regular Session.

Ten Policies Revised — All acts in this issue are effective August 1, 2026.

This installment addresses ten policies affected by seven acts of the 2026 Regular Session. These are the policies we prioritized in the first batch. Four of the ten come from a single act, the Teacher's Shield Act, which reaches both employee leave and student discipline. Please use the summaries below as a guide to the revised policy updates you will receive next week.

POLICIES IN THIS ISSUE

- Child Abuse
- Sick Leave
- Suspension
- Education of Students with Exceptionalities
- Behavioral Health Services for Students
- Personal Leave
- Discipline
- Expulsion
- Cameras in Special Education Classrooms
- Emergency Operations Plans

2026 LEGISLATIVE CHANGES

Effective August 1, 2026

Child Abuse

R.S. 17:421 ACT 631

Act 631 enacts La. Rev. Stat. Ann. §17:421, confirming that school employees who are mandatory reporters are subject to all provisions of state law relative to mandatory reporters, including the training and reporting requirements of the Children's Code. The **Child Abuse** policy has been revised to add this provision. Effective August 1, 2026.

Personal Leave

R.S. 17:1208 ACT 625

Act 625 amends La. Rev. Stat. Ann. §17:1208 to increase personal leave from two (2) days to four (4) days per school year. The increase applies to teachers only. The **Personal Leave** policy has been revised to provide four (4) days for teachers, with other employees remaining at two (2) days. Bus operators continue to be excluded by statute. Effective August 1, 2026.

Sick Leave

R.S. 17:1201, 17:1206.1 ACT 539

Act 539, the Teacher's Shield Act, provides that sick leave resulting from an assault or battery may be used for medical treatment, psychological treatment, and physical rehabilitation. The **Sick Leave** policy has been revised to add this language. Effective August 1, 2026.

Discipline

R.S. 17:416 ACT 539

Act 539 amends La. Rev. Stat. Ann. §17:416 to provide that no principal or administrator may prohibit, discourage, or retaliate against a teacher or school employee for taking disciplinary action against a student, so long as the action is taken in accordance with School Board policy. Each school must also give written notice at the beginning of each school year to teachers and school employees, including bus operators, of their rights to take or request disciplinary action and of their eligibility for leave if injured by a student. The **Discipline** policy has been revised accordingly. Effective August 1, 2026.

Suspension

R.S. 17:416 ACT 539

Act 539 revises the immediate suspension requirements for assault or battery on a school employee. When a student is formally accused, the principal is to suspend the student immediately and remove the student from the school premises, or prohibit the student from returning. The requirement now reaches an incident occurring off school property only when that incident continues a documented altercation that began on school property. The **Suspension** policy has been revised. Effective August 1, 2026.

Expulsion

R.S. 17:416 ACT 539

Act 539 adds expulsion requirements for assault or battery on a school employee. Following an immediate suspension, the principal is to recommend the student's expulsion, which is to be no less than two complete school semesters, during which the student is placed in an alternative school or alternative educational placement and participates in an anger management program. Unless the school system has no other school of suitable grade level for the student to attend, a student found guilty may not be assigned to or attend the school to which the affected employee is assigned; a student expelled under this provision may not attend that school under any circumstances. Related documentation is to be maintained in the student's records. The **Expulsion** policy has been revised. Effective August 1, 2026.

Education of Students with Exceptionalities

R.S. 17:1946 ACT 943

Act 943 enacts La. Rev. Stat. Ann. §17:1946(B)(3), placing the burden of proof in special education due process hearings on the School Board. The Board carries both the burden of persuasion and the burden of production as to the appropriateness of a student's program or placement, and must meet it by a preponderance of the evidence. The **Education of Students with Exceptionalities** policy has been revised to add this provision. Effective August 1, 2026.

Cameras in Special Education Classrooms

R.S. 17:1948 ACT 237

Act 237 amends La. Rev. Stat. Ann. §17:1948 to require that both the superintendent and his designee, or two designees of the superintendent, be present at the initial viewing of a recording after a request has been made. It also requires any person who views a recording and suspects a violation of state or federal law to report the suspected violation to the appropriate law enforcement agency. The **Cameras in Special Education Classrooms** policy has been revised to add both requirements. Effective August 1, 2026.

Behavioral Health Services for Students

R.S. 17:173 ACT 944

Act 944 makes extensive changes to La. Rev. Stat. Ann. §17:173. Behavioral health services are now to be provided in the classroom to the extent medically necessary, and outside the classroom where medically necessary. The Act adds a school-based service delivery review meeting to be held after a parent submits a treatment plan, sets expectations for provider conduct on campus, and provides that a parent or legal guardian is the only person who may file a dispute resolution claim. Where a provider's treatment plan conflicts with a student's educational plan, the student plan controls. The **Behavioral Health Services for Students** policy has been revised throughout. Effective August 1, 2026.

Emergency Operations Plans

R.S. 17:416.16 ACT 821

Act 821 rewrites La. Rev. Stat. Ann. §17:416.16 and renames this policy. Boards will find it in their manuals under its former title, *Emergency/Crisis Management.* The Crisis Management and Response Plan becomes the Emergency Operations Plan, the District Threat Assessment Team becomes the District Safety and Emergency Team with revised membership, and "active shooter" becomes "active assailant." The Act also classifies preparedness exercises as discussion-based or operations-based, revises the classroom door requirements, and replaces the Superintendent's annual report with annual school and district safety questionnaires. The **Emergency Operations Plans** policy has been revised. Effective August 1, 2026.

A NOTE ON NEXT STEPS

Revised policy language for the ten policies above will be delivered next week. Our review of the 2026 session is ongoing, and additional policies will follow in later installments. Questions in the meantime? Reach out to your Forethought consultant directly.

H-4.4

Child Abuse

LEGISLATIVE UPDATE - DRAFT - July 29, 2026

The City of Baker School Board shall require that instances of suspected child abuse and/or neglect be reported in accordance with appropriate state and local laws and procedures. Therefore, the School Board directs that all school personnel be informed of their responsibilities under law as mandatory reporters when performing their occupational duties.

Each school employee who is a mandatory reporter as defined in the Louisiana Children's Code is subject to all provisions of state law relative to mandatory reporters, including but not limited to the training and reporting requirements for teaching or childcare providers provided in the Louisiana Children's Code.

Students shall be provided age- and grade-appropriate instruction relative to child assault awareness and prevention, and how students may report abuse or assault to the child protection toll-free hotline operated by the State Department of Children and Family Services, and where students may locate the number for the hotline.

Each public school shall post the hotline number in a prominent location on its website.

DEFINITIONS

Abuse means any one of the following acts which seriously endanger the physical, mental, or emotional health and safety of the child:

1. The infliction, attempted infliction, or, as a result of inadequate supervision, the allowance of the infliction or attempted infliction of physical or mental injury upon the child by a parent or any other person.

2. The exploitation or overwork of a child by a parent or any other person, including but not limited to commercial sexual exploitation of the child.

3. The involvement of the child in any sexual act with a parent or any other person, or the aiding or toleration by the parent, caretaker or any other person of the child's involvement in (i) any sexual act with any other person; (ii) pornographic displays; (iii) any sexual activity constituting a crime under Louisiana law; or (iv) a coerced abortion conducted upon a child.

Caretaker means any person legally obligated to provide or secure adequate care for a child, including a parent, tutor, guardian, legal custodian, foster home parent, an employee of a public or private day care center, an operator or employee of a registered family child day care home, or other person providing a residence for the child.

Child, for purposes of this policy, means a person under eighteen (18) years of age, who prior to juvenile proceedings, has not been judicially emancipated or emancipated by marriage.

A *mandatory reporter* means any person who provides or assists in the teaching, training, and supervision of a child, including any public or private teacher, teacher's aide, instructional aide, school principal, school staff member, bus operator, coach, professor, technical or vocational instructor, technical or vocational school staff member, college or university administrator, college or university staff member, social worker, probation officer, foster home parent, group home or other child care institutional staff member, personnel of residential home facilities, a licensed or unlicensed day care provider, or any individual who provides such services to a child in a voluntary or professional capacity.

A *permitted reporter* means any other person having cause to believe that a child's physical or mental health or welfare is endangered as a result of abuse or neglect.

Neglect means the refusal or unreasonable failure of a parent or caretaker to supply the child with necessary food, clothing, shelter, care, treatment, or counseling for any injury, illness, or condition of the child, as a result of which the child's physical, mental, or emotional health and safety is substantially threatened or impaired. Neglect includes prenatal neglect. In accordance with statutory provisions, the inability of a parent or caretaker to provide for a child due to inadequate financial resources shall not, for that reason alone, be considered neglect. Whenever, in lieu of medical care, a child is being provided treatment in accordance with the tenets of a well-recognized religious method of healing which has a reasonable, proven record of success, the child shall not, for that reason alone, be considered to be neglected or maltreated. However, nothing herein shall prohibit the court from ordering medical services for the child when there is substantial risk of harm to the child's health or welfare.

<u>PROCEDURE FOR REPORTING CHILD ABUSE OR NEGLECT</u>

A *permitted reporter* shall make a report through the designated state child protection reporting hotline phone number or in person at any child welfare office of the state.

A *mandatory reporter*, notwithstanding any claim of privileged communication, who has cause to believe that a child's physical or mental health or welfare is endangered as a result of abuse or neglect or that abuse or neglect was a contributing factor in a child's death, in accordance with statutory provisions, shall immediately report suspected abuse/neglect in accordance with the following guidelines:

1. Reports in which the abuse or neglect is believed to be perpetrated by a parent or caretaker, a person who maintains an interpersonal dating or engagement relationship with the parent or caretaker or a person living in the same residence with the parent or caretaker as a spouse whether married or not, the mandatory reporter shall make the report to the Department of Children and Family Services through the designated state child protection reporting hotline telephone number, via the Department of Children and Family Services *Mandated Reporter Portal* online, or in person at any child welfare office.

2. Reports in which the abuse or neglect is believed to be perpetrated by someone other than a caretaker, a person who maintains an interpersonal dating or engagement relationship with the parent or caretaker, or a person living in the same residence with the parent or caretaker as a spouse whether married or not, and the caretaker is not believed to have any responsibility for the abuse or neglect shall be made immediately to a local or state law enforcement agency.

3. Dual reporting to both the Louisiana Department of Child and Family Services and the local or state law enforcement agency is permitted.

4. A report made to the Louisiana Department of Children and Family Services by facsimile does not relieve the reporter of his/her duty to report in accordance with the applicable requirements.

Reporting Procedure

1. If the initial report was in oral form, it shall be followed by a written report made within five (5) days via the online *Mandated Reporter Portal* of the Department of Children and Family Services, or by mail to the centralized intake unit of the Department at the address provided on the website of the Department, or, if necessary, to the local law enforcement agency to whom the initial report was made.

2. The report shall contain the following information if known by the reporter:

   A. The name, address, age, sex, and race of the child.

   B. The nature, extent, and cause of the child's injuries or endangered condition, including any previous known or suspected abuse to this child or the child's siblings.

   C. The name and address of the child's parent(s) or other caretaker.

   D. The names and all the ages of all other members of the child's household.

E. The name and address of the reporter.

F. An account of how this child came to the reporter's attention.

G. Any explanation of the cause of the child's injury or condition offered by the child, the caretaker, or any other person.

H. The number of times the reporter has filed a report on the child or the child's siblings.

I. Any other information which the reporter believes might be important or relevant.

3. The report shall also name the person or persons who are thought to have caused or contributed to the child's condition, if known, and the report shall contain the name of such person if he/she is named by the child.

4. The reporter shall also immediately notify the principal or his/her designee of the school attended by the child of the fact that a report had been filed and the agency(ies) to which it was reported.

INVESTIGATION OF REPORTS

Admission of the investigator on school premises or access to the child in school shall not be denied by school officials.

ALLEGATION AGAINST SCHOOL EMPLOYEES OR VOLUNTEERS

When an employee is accused of the use of impermissible corporal punishment or moral offenses involving students, the principal shall initiate an investigation (see procedures under policy *F-12.3, Investigations*). If the offender is a central office employee, or principal, the immediate supervisor will initiate an investigation.

Upon any school employee receiving a report of, or information about, child abuse, against another school employee or volunteer, and the employee receiving said information has cause to believe the truthfulness thereof, the reporting procedure as outlined in this policy shall be followed, depending upon whether the employee or volunteer is considered a caretaker or someone other than a caretaker.

The school employee shall also, as soon as reasonably possible, notify the appropriate immediate supervisor of the accused individual, and that supervisor in turn will as soon as reasonably possible, notify the Superintendent or his/her designee. The Superintendent and the School Board's attorney will determine what appropriate action the school system may take over and above the investigation being conducted by the appropriate state agency. In any incident involving an employee or volunteer which is reported to the Superintendent or designee, the person shall be removed from all activities involving direct contact with students until the matter is resolved.

ALLEGATIONS OF SEXUAL OFFENSES

The Superintendent or his/her designee shall be required to notify the local law enforcement agency of any allegation made by a student of the commission of a sex offense as defined by La. Rev. Stat. Ann. §15:541. Such notification shall be made by the Superintendent or his/her designee within twenty-four (24) hours of the time the student notified the Superintendent or other appropriate personnel. Any school employee who receives information from a student concerning the possible commission of a sexual offense shall immediately comply with the reporting procedure outlined in this policy and inform the Superintendent or his/her designee.

CONFIDENTIALITY

The circumstances and information of the initial report, the fact that a report was made to an agency, and the written report shall be held in confidence and shall not be disseminated to third parties other than those persons or agencies designated by this policy or required by state law. Any written report or other written information regarding the report shall be kept in a confidential file separate from the child's routine school records and accessible only by the principal/designee/supervisory employee or by court order.

INSERVICE TRAINING

Teaching or child care providers shall be required to complete an online training course provided by the Department of Children and Family Services between June first and August thirty-first annually. A record of completion of the course by the teaching or child care provider shall be provided to and retained by the School Board. The School Board shall retain a list of all teaching or child care providers who have not complied with the training requirements provided by State law.

IMMUNITY FROM LIABILITY

Any person who in good faith makes a report, cooperates in any investigation arising as a result of such report, or participates in judicial proceedings authorized under the Louisiana Children's Code shall have immunity from civil or criminal liability that otherwise might be incurred or imposed. This immunity, however, does not extend to (1) a person who participates in or conspires with a participant or an accessory to an offense involving the abuse or neglect of a child; (2) any person who makes a report known to be false or with reckless disregard for the truth of the report.

LIABILITY

The Louisiana Children's Code and Louisiana criminal law provide substantial penalties for mandatory reporters who fail to report facts which would support a reasonable belief that child abuse or neglect has occurred. Additionally, educators or other employees of the City of Baker School Board who fail or refuse to report child abuse/neglect as provided by law or by this policy may be subject to disciplinary and/or dismissal proceedings for neglect of duty.

Latest revised**Revised: December 6, 2022**

▶ Full revision history (6 entries)

References

- La. Rev. Stat. Ann. §§14:403, 15:539, 15:541, 17:421, 17:81, 17:81.6

  La. Children's Code, Title VI, Art. 601, Art. 603, 603.1, Art. 609, Art. 610

Board Minutes

- Board minutes, 3-4-08, 5-3-16, 7-25-18, 3-3-20, 11-18-20, 12-6-22

F-11.5

REDLINE

Personal Leave

LEGISLATIVE UPDATE - DRAFT - July 30, 2026

Teachers ~~and other employees~~ of the City of Baker School Board, except those who receive annual leave (vacation time), shall be allowed up to ~~two (2)~~ four (4) days absence during each school year to be used for such purposes as may be determined by the individual employee without loss of pay. ~~Personal leave shall be charged to and deducted from current and/or accumulated sick leave as of the date personal leave is taken.~~ All other employees of the City of Baker School Board, except bus operators and those who receive annual leave (vacation time), shall be allowed up to two (2) days absence during each school year to be used for such purposes as may be determined by the individual employee without loss of pay. ~~Personal leave shall not be accumulated from year to year, nor shall personal leave be compensated for upon death or retirement or paid in any other manner except as provided by law.~~

Personal leave shall be charged to and deducted from current and/or accumulated sick leave as of the date personal leave is taken. Personal leave shall not be accumulated from year to year, nor shall personal leave be compensated for upon death or retirement or paid in any other manner except as provided by law.

Persons wishing to take personal leave shall notify the principal of the school in which he/she is employed or his/her staff supervisor of his/her intention to take such personal leave at least twenty-four (24) hours before personal leave will be taken. All employees requesting personal leave must submit a *Request for Leave* form to the principal/immediate supervisor for approval.

References

- La. Rev. Stat. Ann. §§17:1208, 17:1208.1

City of Baker School District

G-2.4C

Education of Students with Exceptionalities

LEGISLATIVE UPDATE - DRAFT - July 30, 2026

The City of Baker School Board shall make available a free appropriate public education in the least restrictive educational environment to each student with an exceptionality, ages three through twenty-one, who is a resident of the geographical boundaries of the school district. Special education and related services may be provided by the School Board to eligible children with exceptionalities under three years of age. Generally, identified children shall be screened and evaluated to determine eligibility to receive special education and related services. If it is determined through the evaluation process that a child has a disability and, by reason thereof, needs special education and related services, then the child is classified in accordance with Louisiana's *Pupil Appraisal Handbook*, Bulletin 1508, and becomes eligible to receive special education services. All special education services shall be provided to eligible students with exceptionalities in accordance with the regulations outlined in *Regulations for the Implementation of the Exceptional Children's Act*, Bulletin 1706 and all other applicable federal and state regulations.

The School Board shall establish and maintain policies and procedures in accordance with federal and state laws and regulations to ensure that students with exceptionalities and their parents are provided the necessary procedural safeguards with respect to the provision of free appropriate public education by the School Board. In any special education due process hearing, the School Board shall have the burden of proof, including the burden of persuasion and production, relative to the appropriateness of a student's program or placement or the appropriateness of the program or placement proposed by the School Board. This burden shall be met by a preponderance of the evidence.

NOTIFICATION OF INDIVIDUAL RIGHTS

Each school shall provide parents, legal guardians, or tutors of students with exceptionalities written information regarding legal procedures affecting the transfer of individual rights from parent, legal guardian, or tutor to child when the child attains the age of majority, including but not limited to supported decision making, power of attorney, continuing or permanent tutorship, and limited and full interdiction. The document shall inform parents, legal guardians, or tutors and how each option relates to such transfer of rights.

At the child's first Individualized Education Program (IEP) meeting of the school year, the document shall be provided to a parent, legal guardian, or tutor of each child who is fourteen, fifteen, sixteen, or seventeen years old who participates in alternate assessment pursuant to La. Rev. Stat. Ann. §17:24.4(F)(3) or an alternate pathway to promotion pursuant to La. Rev. Stat. Ann. §17:24.4(H). Parents, legal guardians, or tutors shall be provided a form by which to confirm receipt of the information.

SECLUSION AND RESTRAINT

The School Board recognizes that, in order for students to receive a free appropriate public education, a safe learning environment needs to be provided. In doing so, the School Board also recognizes that there are circumstances in school under which reasonable and appropriate measures and techniques will need to be employed in dealing with students with exceptionalities who pose an imminent risk of harm to self or others.

The School Board fully supports the use of positive behavior interventions and support when addressing student behavior. The School Board reserves its right, however, to use physical restraint and/or seclusion consistent with state law to address the behavior of a student with an exceptionality when school personnel reasonably believe the behavior poses an imminent risk of harm to the student or others. The School Board shall not preclude the use of physical restraint and/or seclusion performed consistent with the requirements of a student's *Individualized Education Program* (IEP) or behavior intervention/management plan.

The provisions regarding seclusion and restraint shall not be applicable to a student who has been deemed to be gifted or talented under Bulletin 1508, unless the student has been identified as also having a disability under Bulletin 1508.

Definitions

Imminent risk of harm shall mean an immediate and impending threat of a person causing substantial physical injury to self or others.

Seclusion shall mean a procedure that isolates and confines a student in a separate room or area until he or she is no longer an immediate danger to self or others.

Seclusion room means a room or other confined area, used on an individual basis, in which a student is removed from the regular classroom setting for a limited time to allow the student the opportunity to regain control in a private setting and from which the student is involuntarily prevented from leaving.

Mechanical restraint means the application of any device or object used to limit a person's movement. Mechanical restraint does *not* include: (1) A protective or stabilizing device used in strict accordance with the manufacturer's instructions for proper use and which is used in compliance with orders issued by an appropriately licensed health care provider; and (2) Any device used by a duly licensed law enforcement officer in the execution of his/her official duties.

Physical restraint means bodily force used to limit a person's movement. Physical restraint does *not* include: (1) Consensual, solicited, or unintentional contact; (2) Momentary blocking of a student's action if the student's action is likely to result in harm to the student or other person; (3) Holding of a student, by one school employee, for the purpose of calming or comforting the student, provided the student's freedom of movement or normal access to his or her body is not restricted; (4) Minimal physical contact for the purpose of safely escorting a student from one area to another; (5) Minimal physical contact for the purpose of assisting the student in completing a task or response.

Positive behavior interventions and support means a systematic approach to embed evidence-based practices and data-driven decision making when addressing student behavior in order to improve school climate and culture.

School employee means a teacher, paraprofessional, administrator, support staff member, or a provider of related services.

Documentation and Notification

The parent or other legal guardian of a student who has been placed in seclusion or physically restrained shall be notified as soon as possible. The student's parent or other legal guardian shall also be notified in writing, within twenty-four (24) hours, of each incident of seclusion or physical restraint. Such notice shall include the reason for such seclusion or physical restraint, the procedures used, the length of time of the student's seclusion or physical restraint, and the names and titles of any school employee involved.

The director or supervisor of special education shall be notified any time a student is placed in seclusion or is physically restrained.

A school employee who has placed a student in seclusion or who has physically restrained a student shall document and report each incident. Such report shall be submitted to the school principal not later than the school day immediately following the day on which the student was placed in seclusion or physically restrained and a copy shall be provided to the student's parent or legal guardian.

The guidelines and procedures regarding seclusion and restraint maintained by the Superintendent and staff shall be provided to the Louisiana Department of Education (LDE), all school employees, and every parent of a student identified with a disability under Bulletin 1508.

All instances where seclusion or physical restraint is used to address student behavior of students with disabilities under Bulletin 1508 shall be reported, in accordance with the

Louisiana Board of Elementary and Secondary Education (BESE) policy, by the School Board to the LDE.

Guidelines and Procedures

The School Board shall require the Superintendent and staff to maintain adequate written guidelines and procedures governing the use of seclusion and physical restraint of students in accordance with federal and state law, as well as regulations and guidelines promulgated by BESE. The School Board shall approve written guidelines and procedures regarding appropriate responses to student behavior that may require immediate intervention using seclusion and/or restraint. The written guidelines and procedures shall be provided to all school employees and every parent of a student with an exceptionality and shall include reporting requirements and follow-up procedures, including notification requirements for school officials, notification to the student's parent or legal guardian, and reporting of seclusion and restraint incidents to the LDE.

The written guidelines and procedures shall be posted at each school under the jurisdiction of the School Board, and on the School Board's website.

Follow-Up

Following any situation resulting in the use of seclusion or restraint of a student, a *Functional Behavioral Assessment* (FBA) should be considered. If a student subject to the use of seclusion or physical restraint is involved in five (5) such incidents in the school year, the student's *Individualized Education Program* (IEP) team shall review and revise the student's Behavior Intervention Plan (BIP) to include any appropriate and necessary behavioral supports. Thereafter, if the student's challenging behavior continues or escalates, requiring repeated use of seclusion or physical restraint practices, the special education director or supervisor or his/her designee shall review the student's plans at least once every three (3) weeks.

Employee Training Requirements

The Superintendent or his/her designee shall be responsible for conducting or obtaining appropriate training programs for school personnel designed to address the use of seclusion and restraint techniques with students with disabilities. In addition, positive behavioral intervention strategies, crisis intervention, and de-escalation, as well as other procedures, may also be included in any training.

Charter Schools

Notwithstanding any state law, rule, or regulation to the contrary and except as may be otherwise specifically provided for in an approved charter, a charter school established and operated in accordance with State law, including its approved charter and the school's officers and employees, shall be subject to the School Board's policy and written procedures and guidelines regarding the use of seclusion and restraint with students with exceptionalities.

Latest revised**Revised: January 14, 2025**

▶ Full revision history (7 entries)

References

- 20 USC 1400 et seq. (*Individuals with Disabilities Education Act*)
- 34 CFR 300 (*Assistance to States for the Education of Children with Disabilities*)
- La. Rev. Stat. Ann. §§17:7, 17:416.21, 17:1941, 17:1942, 17:1943, 17:1944, 17:1945, 17:1946, 17:1947

Pupil Appraisal Handbook, Bulletin 1508

Regulations for the Implementation of the Exceptional Children's Act, Bulletin 1706, Louisiana Department of Education

City of Baker School District

Board Minutes

- Board minutes, 5-19-09, 5-3-16, 7-25-18, 2-1-22, 1-14-25

H-3.6I

Behavioral Health Services for Students

LEGISLATIVE UPDATE - DRAFT - August 5, 2026

The City of Baker School Board recognizes the connection between a student's social, emotional, and mental well-being and the student's academic success. The School Board desires to assist students in developing the social and emotional skills needed for participation in the educational environment and society at large. In addition to any support services provided by the School Board, the School Board shall allow behavioral health providers to provide medically necessary behavioral health services authorized by an independent third-party payor, including but not limited to Medicaid and commercial insurance, to a student at school during school hours if the student's parent or legal guardian provides a written request for such behavioral health provider and services to the Superintendent or Superintendent's designee, and all other requirements of La. Rev. Stat. Ann. §§17:173 and 17:3996, this policy, and any administrative procedures are met.

A behavioral health provider who provides services according to this policy shall:

1. Maintain general liability insurance coverage in an amount not less than $1,000,000.00 per occurrence and $1,000,000.00 per aggregate and provide a certificate of insurance naming the public school as the certificate holder.

2. Complete a criminal background check conducted by the Louisiana State Police and shall pay all related costs. Applied behavior analysis providers who are licensed, certified, or registered by the Louisiana Behavior Analyst Board, who provide documentation of having passed a criminal background check conducted by the Louisiana State Police and are in good standing with the Board shall not be required to complete an additional criminal background check.

   No person who has been convicted of or pled *nolo contendere* to a crime listed in La. Rev. Stat. Ann. §15:587.1 (C) shall be permitted to provide behavioral health services to a student at school during school hours.

Behavioral health services shall be permitted during school hours if the student's parent or legal guardian presents a behavioral health evaluation performed by an evaluator as well as an assessment and authorized treatment plan performed by a behavioral health provider chosen by the parent or legal guardian and the evaluation indicates that the services are necessary during school hours to assist the student with behavioral health impairments associated with a medical diagnosis that the evaluator determines are interfering with the student's ability to thrive in the educational setting. A behavioral health evaluation or assessment presented by the parent or legal guardian of a student shall not be construed as an independent educational evaluation for purposes of determining if a student meets the criteria established for eligibility for special education and related services.

In addition, the parent or legal guardian of a student receiving services from a behavioral service provider shall be required to execute a *consent to release information* form between the provider and the School Board.

No behavioral health evaluation, assessment, or authorized treatment plan shall be prohibited from being performed on school property in order to establish medical necessity or to deliver medically necessary services. Behavioral health services shall be provided in a physical classroom, to the extent that it is medically necessary, during any part of the school day, including any and all instructional time in courses including but not limited to English, reading, mathematics, and science. However, behavioral health services shall also be provided outside of the physical classroom to the extent that it is medically necessary.

~~No behavioral health evaluation, assessment, or authorized treatment plan shall be prohibited from being performed on school property in order to establish medical necessity or to deliver medically necessary services. Behavioral health services may be provided during any part of the school day, including any and all instructional time in English, reading, mathematics, and science.~~ The school administrator and service provider shall work collaboratively to create a consistent schedule that meets the medical needs of the student and complies with the provider's ethical code of conduct. In developing the student's plan, consideration shall include impacts on a school's operations and a student's testing schedule. If the parties cannot agree, then the parties shall engage in a dispute resolution process set forth by the state Department of Education.

The School Board shall not enter into a contract or an exclusive agreement with a behavioral health provider that prohibits the parent or legal guardian from choosing the behavioral health provider for the student. However the provisions of this paragraph shall not impair any existing contract on the effective date of this policy, or the renewal thereof.

The cost of all behavioral health services provided to a student shall be the sole responsibility of the parent or legal guardian, individually or through an applicable health insurance policy, Medicaid, or other third-party payor, other than the School Board, that has made funds available for the payment for the services provided.

While on a school campus, a behavioral ~~service~~ health provider shall comply with, and abide by, the terms of any *Individualized Education Plan, Individualized Accommodation Plan, Section 504 Plan, Behavior Management Plan*, or *Individualized Health Plan* applicable to a student who is a patient of the provider. The services furnished by a provider shall be incorporated into a written treatment plan applicable to a student.

The School Board shall establish reporting requirements for a behavioral health provider related to the student's progress and student and school safety concerns as related to the student's educational program.

SCHOOL-BASED SERVICE DELIVERY REVIEW MEETING

The Superintendent shall approve administrative procedures to provide for student safety and effective implementation of this policy.

Within twenty-one days after a parent or guardian submits a behavioral health treatment plan to a school administrator and no later than fourteen school days after behavioral health services begin, the school administrator or his designee shall ensure that a school-based service delivery review meeting is held in person or virtually.

At a minimum, the meeting shall include the school administrator or his designee, the student's classroom teacher(s), and the behavioral health provider. The meeting may also include the student's special education teacher, case manager, or other school employee responsible for implementation of the student's Individualized Education Plan, Individualized Accommodation Plan, Section 504 Plan, Behavior Intervention Plan, or Individualized Health Plan.

Behavioral health services may begin prior to the school-based service delivery review meeting, if reasonable efforts are made to coordinate with school personnel. A behavioral health provider may initiate and continue medically necessary services, and the school shall provide reasonable access to the student, pending completion of the meeting. Reasonable access shall include the ability to enter the school, observe the student, and deliver authorized services during the school day in coordination with instructional activities.

The school-based service delivery review meeting shall, at a minimum address the following:

1. Review of the provider's written treatment plan and any applicable Individualized Education Plan, Individualized Accommodation Plan, Section 504 Plan, Behavior Intervention Plan, or Individualized Health Plan.
2. The role and responsibilities of the behavioral health provider while on the school campus, including activities to be conducted in the classroom during instructional time.
3. The classroom routines, school policies, and behavioral expectations applicable to the student.
4. The method and frequency of ongoing communication between the behavioral health provider and school personnel and the chain of communication for questions

or concerns.

5. The schedule for behavioral health services during the school day, including how services will be coordinated with instructional activities, assessments, and school-wide events.
6. Procedures for requesting a follow-up school-based service delivery review meeting when the behavioral health provider changes or there is a material change in the student's classroom or educational placement or in the behavioral health provider's written treatment plan.
7. The school-based service delivery meeting shall not take the place of any meetings required by a student's Individualized Education Plan.

A behavioral health provider delivering services shall use reasonable efforts to minimize disruption to instruction and classroom management. Recommendations, concerns, or requested changes regarding classroom strategies, interventions, accommodations, modifications, supports, or safety procedures shall be communicated to the teacher and the school administrator or his designee outside the presence of other students, except when immediate action is necessary to prevent imminent risk of harm to the student or another person. If supervision of the behavioral health provider is conducted virtually, no other student except the student receiving behavioral health services shall be recorded.

A behavioral health provider shall not direct, supervise, or evaluate the job performance of a teacher or other school employee. A behavioral health provider's role in the classroom shall be limited to delivery of services to the designated student, which may include collaboration with school personnel to support implementation of the student's treatment plan. A behavioral health provider shall not implement or direct the implementation of medically necessary services that knowingly interfere, impede, or conflict with services the school is legally required to provide under a student's Individualized Education Plan, Individualized Accommodation Plan, Section 504 Plan, Behavior Intervention Plan, or Individualized Health Plan, without collaboration and agreement between service providers.

The School Board may establish sanctions, including termination of a provider's authorization to provide services on any school campus, against a behavioral health provider for failure to comply with the provisions of this policy and associated procedures and/or any other School Board policy and procedures. The contract or agreement between the School Board and a behavioral health provider may specify whether a school principal may dismiss a behavioral health provider staff member from the campus and the terms under which such a dismissal is permissible.

Any behavioral health evaluation, assessment, or treatment plan administered by the School Board shall not supersede the behavioral health evaluation, assessment, or treatment plan provided by an independent behavioral health provider of a student's parent's choosing. Any applied behavior analysis services provided by the School Board shall be delivered either by behavioral health providers licensed, certified, or registered by the Louisiana Behavior Analyst Board in accordance with La. Rev. Stat. Ann.

§37:3701 et seq. or behavioral health providers providing services in accordance with La. Rev. Stat. Ann. §37:3715.

DEFINITIONS

Applied behavior analysis provider shall mean a provider who is licensed, certified, or registered by the Louisiana Behavior Analyst Board and is in good standing to provide applied behavior analysis services.

Applied behavior analysis services shall include the design, implementation, and evaluation of systematic instructional and environmental modifications by an applied behavior analysis provider to produce socially significant improvements in behavior as described in the Behavior Analyst Practice Act.

Behavioral health evaluation shall include but not be limited to the following criteria:

- Diagnosis.
- Type of intervention.
- Length of intervention.
- Identification of a student's goals.
- Identification of impact of student behavior on a student's educational program.
- Recommendations for applied behavior analysis services.

Behavioral health provider shall mean a provider who is licensed by the Louisiana Department of Health or a health profession licensing board and is in good standing to provide behavioral health services in Louisiana including but not limited to a psychiatrist, psychologist, medical psychologist, licensed specialist in school psychology, marriage and family therapist, professional counselor, clinical social worker, applied behavioral analysis provider, or a behavioral health provider organization licensed to provide health services in Louisiana.

Behavioral health services shall include but not be limited to individual psychotherapy, family psychotherapy, psychotropic medication management, community psychiatric support and treatment, crisis intervention, and medically necessary applied behavior analysis services.

Evaluator shall mean a licensed psychiatrist, psychologist, medical psychologist, licensed specialist in school psychology, professional counselor, marriage and family therapist, clinical social worker, or applied behavioral analysis provider who is certified by the respective board of examiners in Louisiana to provide necessary evaluations and who is not an employee of the School Board or the Louisiana Department of Education.

Independent third-party payor means an individual who serves as a case reviewer for Medicaid or commercial insurers.

Medically necessary services means services that meet the following requirements:

1. Provided for the diagnosis, treatment, cure, or relief of a health condition, illness, injury, or disease.

2. Except for clinical trials that are described within the policy, not for experimental, investigational, or cosmetic purposes.

3. Within the generally accepted standards of medical care in the community.

4. Not solely for the convenience of the insured, the insured's family, or the provider.

~~No provisions of this policy shall be construed to supersede any of the following:~~

1. ~~The authority of a student's Individualized Education Program Team or Section 504 Committee to determine appropriate services for a student pursuant to applicable federal and state.~~

2. ~~The provisions of the *Behavioral Health Services Provider Licensing Law* or any regulation promulgated by the Louisiana Department of Health pursuant to that law.~~

3. ~~The provisions of the *Behavior Analysis Practice Act*.~~

~~**New policy: March 3, 2020**~~

~~Recoded from H-3.6h: July 2, 2024~~

~~**Revised: October 1, 2024**~~

School-based service delivery review meeting means a meeting held, either in person or virtually, for the purpose of reviewing the delivery of behavioral health services in the school setting, including the behavioral health provider's role, applicable student plans, classroom expectations, communication, scheduling, and other procedures necessary to support uninterrupted instruction and appropriate coordination with school personnel and the behavioral health provider.

A parent or legal guardian shall be the sole person permitted to file a dispute resolution claim in relation to a student, which shall be filed only after an alleged incident has occurred. In the event of a conflict between a student's Individualized Education Plan, Individualized Accommodation Plan, Section 504 Plan, Behavior Intervention Plan, or Individualized Health Plan and a behavioral health provider's written treatment plan, the Individual Education Plan, Individualized Accommodation Plan, Section 504 Plan, Behavior Intervention Plan, or Individualized Health Plan shall control with respect to the student’s educational services and supports. Nothing in this Section shall be construed to require medically necessary behavioral health services authorized under this Section be included in any such student plan as a condition of being delivered on school property, nor shall the absence of such services from any such student plan constitute a basis to deny those services.

No provisions of this policy shall be construed to supersede any of the following:

1. The authority of a student's Individualized Education Program Team or Section 504 Committee to determine appropriate services for a student pursuant to applicable federal and state.

2. The provisions of the *Behavioral Health Services Provider Licensing Law* or any regulation promulgated by the Louisiana Department of Health pursuant to that law.

3. The provisions of the *Behavior Analysis Practice Act*.

New policy: March 3, 2020

Recoded from H-3.6h: July 2, 2024

Revised: October 1, 2024

Cross References

- H-4
- H-12

References

- 20 USC 1232(g-i) (*Family Educational Rights and Privacy Act*)
- La. Rev. Stat. Ann. §§17:7, 17:173

Board Minutes

- Board minutes, 3-3-20, 7-2-24, 10-1-24

City of Baker School District
~~City of Baker School District~~

E-1.1B

Emergency Operations Plans

LEGISLATIVE UPDATE - DRAFT - August 9, 2026

Unanticipated tragic events can quickly escalate into a school-wide catastrophe if not dealt with immediately and effectively. School personnel shall plan in advance for the welfare, safety, and care of students and staff members. ~~Every school shall be required to have a Crisis Management and Response Plan and a District Threat Assessment Team.~~ Every school shall be required to have an *Emergency Operations Plan.* ~~The School District shall have an Emergency Preparedness and Recovery Point of Contact.~~ The School District shall also have an Emergency Support Coordinator and a Safety and Emergency Team.

DEFINITIONS

~~*Crisis Management and Response*~~ *Emergency Operations* *Plan* shall mean a plan to address school safety and the incidence of a shooting or other violence at schools, on school buses, and at school-related activities; to respond effectively to such incidents; and to ensure that every student, teacher, and school employee has access to a safe, secure, and orderly school that is conducive to learning. The plan shall also address the management of any other emergency situation.

~~*District Threat Assessment Team* shall mean a team established by the School Board. The team shall include the Superintendent; the principal of each school; a person with responsibility over the school facilities; a mental health professional employed by the School Board, or, if the School Board has no such employee, a mental health professional selected by the Superintendent; any school resource officer employed by the School Board; any Junior Reserve Officer Training Corps instructor employed by the School Board; and the emergency preparedness and recovery point of contact.~~

~~*Emergency preparedness and recovery point of contact* which shall mean a person selected by the Superintendent to serve as a point of contact with local and state officials and the media in the event of an emergency.~~

~~CRISIS MANAGEMENT AND RESPONSE PLAN~~

District Safety and Emergency Team shall mean a team established by the School Board. The team shall include, at a minimum, the Superintendent, a representative from school facilities, transportation, school nutrition, curriculum, student services, athletics, logistics, mental health, medical services, technology, and special education; the emergency response coordinator; the public information officer; and an elementary school principal, middle school principal, and high school principal.

Emergency response coordinator which shall mean a person selected by the Superintendent who oversees the development of the emergency operations plan and any associated training.

EMERGENCY OPERATIONS PLAN

The ~~*Crisis Management and Response*~~ *Emergency Operations* *Plan* shall be prepared by the principal jointly with local law enforcement, fire, public safety, and emergency preparedness officials. The plan shall seek to utilize resources and information available through the Louisiana Commission on School and Nonprofit Security, La. Rev. Stat. Ann. §29:726.5, et seq. In preparing or revising the plan, the principal shall consult with the ~~Threat Assessment~~ District Safety and Emergency Team. The principal and ~~Threat Assessment~~ the Team shall determine whether to consider input from students enrolled in the school and their parents, teachers at the school, other school employees, and community leaders.

The plan, which shall focus on preventing the loss of life and the injury of students and teachers and other school employees, shall:

1. Detail the roles and responsibilities of each school employee and of each local and state public safety and emergency preparedness office.
2. Include the relevant coordination agreements, services, and security measures of a school.
3. Provide for an all-hazards approach response plan for emergency events including any event with a hostage, an active ~~shooter,~~ assailant, or a building lock-down.
4. Provide for notification of parents, faculty, staff, and local public safety officials in the event of a shooting or other violent incident or emergency situation.
5. Provide for the counseling of students by mental health professionals, encouraging peer helper programs, and identifying students who may have experienced rejection or other traumatic life events.

Each principal, jointly with local law enforcement, fire, public safety, school resource officers, and emergency preparedness officials, shall review the plan at least once annually and shall revise the plan as necessary. When conducting the annual review for a high school, the school principal shall seek input from the president of the senior class or the president of the student council, and at least one other responsible student selected by the principal as representatives of students enrolled in the high school. Each principal shall submit the plan in writing to the Superintendent for approval at least once annually, including upon each revision, and shall notify all teachers and other school employees of the contents of the plan and any revisions made to it.

~~Within the first thirty (30) days of each school year, each principal shall conduct a safety drill to rehearse the components of the *Crisis Management and Response Plan*, including an active shooter scenario. In addition, each school year, each principal shall conduct at least one additional drill during high traffic or transition points in the school~~

~~day. Not later than seven (7) days after each drill, the principal shall submit a written report summarizing the details of the drill to the Superintendent. The Superintendent shall comment on the drill to the principal, who shall consider the comments in revising the plan.~~

~~Each *Crisis Management and Response Plan* shall provide that:~~

1. ~~Classroom doors with locks shall be in compliance with all fire safety standards promulgated by the office of state fire marshal code enforcement and building safety of the Department of Public Safety and Corrections and shall remain locked during instructional time. Each plan shall provide that a locked door shall not obstruct egress.~~
2. ~~If legislative funding is provided, bleeding control kits shall be placed in easily accessible locations in each school; and,~~
3. ~~The principal shall designate employees to be trained in the proper use of a bleeding control kit and in traumatic injury response.~~

~~A person acting in good faith who administers aid for a traumatic injury, including through the use of a bleeding control kit, shall be immune from criminal and civil liability for the administration, unless personal injury results from the gross negligence or willful or wanton misconduct in the administration of aid.~~

~~Each school year, each principal shall be responsible for providing in-service training, which may be incorporated into a meeting or training session held for another purpose, for all teachers and school employees pertaining to the plan and shall involve local law enforcement, fire, public safety, and emergency preparedness officials in the preparation and presentation of the training. The training shall include an active shooter exercise. The training shall be reported to the Superintendent and the Louisiana Department of Education.~~

~~Each principal shall keep a copy of the approved plan in his office and shall provide a copy to the following individuals and departments, each of whom shall be responsible for keeping in his/her respective office a copy of the plan that is readily accessible in the event of a school shooting or other violent incident or emergency situation:~~

1. ~~The President of the School Board;~~
2. ~~The Superintendent; and,~~
3. ~~The chief of police of the municipality or the sheriff of the parish where the school is located, as applicable, as well as the local fire chief whose office is in closest geographic proximity to the school.~~
4. ~~The Louisiana Department of Education.~~
5. ~~The Center for Safe Schools within the Governor's Office of Homeland Security and Emergency Procedures.~~

~~The School Board may adopt rules and regulations as it deems necessary to provide for the implementation of the provisions of this Plan.~~

~~The Superintendent shall make an annual report to the School Board on the status of the plan of each school under the School Board's jurisdiction and shall submit a copy of the report to the Louisiana Department of Education and the Center for Safe Schools.~~

~~School Mapping Data~~

~~Upon preparing a school crisis management and response plan in accordance with La. Rev. Stat. Ann. §.17:416.16 the School Board, or a vendor, shall submit a copy of the most recent blueprints and school mapping data of each school building and facility in the school system, to each local law enforcement agency with jurisdiction over any portion of the school governing authority, each local and state public safety and emergency preparedness office, the Louisiana Center for Safe Schools, and to the school's office for use in response to emergencies.~~

~~All aspects of the school mapping data shall be collected, produced and stored within the United States of America.~~

~~For the purposes of this section, the following terms shall have the following meanings:~~

~~*First responders* means local, state, and federal law enforcement agencies, fire, public safety, and emergency preparedness officials.~~

~~*School mapping data* means information provided in an electronic or digital format to assist first responders in responding to emergencies at public schools.~~

~~The school mapping data provided shall do all of the following:~~

1. ~~Be compatible with software platforms used by local, parish, state, and federal public safety agencies that provide emergency services to the specific school for which the data is provided without requiring such agencies to purchase additional software or requiring a fee to view or access the data.~~
   ~~2, Be compatible with security software platforms in use by the specific school for which the data is provided without requiring public safety agencies or school districts to purchase additional software or requiring a fee to view or access the data.~~
2. ~~Be available in a printable format.~~
3. ~~Be verified by the entity producing the data for accuracy by a walk-through of school buildings and grounds.~~
4. ~~Be oriented true north.~~
5. ~~Be overlaid on current aerial imagery.~~
6. ~~Contain site-specific labeling that matches the structure of school buildings including room labels, hallway names, and external door or stairwell numbers and locations of~~

~~hazards, critical utility locations, key boxes, automated external defibrillators, and trauma kits.~~

7. ~~Contain site-specific labeling that matches the school grounds including parking areas, athletic fields, surrounding roads, and neighboring properties.~~
8. ~~Be overlaid with gridded "x" and "y" coordinates.~~

~~School mapping data shall not be modified or updated independently without corresponding updates to school mapping data within software platforms used by local, parish, state, and federal public safety agencies that provide emergency services to the specific school.~~

~~Blueprints and school mapping data of public school buildings or facilities shall not be subject to the Public Records Law.~~

~~OTHER EMERGENCY DRILLS~~

~~The City of Baker School Board shall require procedures be planned by the principal and faculty of each school to assure orderly movement and evacuation of students to the safest area in the event of fire, weather, or other disasters. Practice drills shall be used to ensure the effectiveness of the procedures.~~

~~Every separate administration building shall conduct practice drills as well.~~

~~Latest revised~~ ~~**Revised April 14, 2026**~~

▶ ~~Full revision history (5 entries)~~

EMERGENCY PREPAREDNESS EXERCISES

For purposes of planning, training, and evaluation, emergency preparedness activities conducted by a school shall be classified as either discussion-based exercises or operations-based exercises.

Discussion-based exercises are designed to increase understanding of emergency plans, roles, and decision-making processes without requiring physical response activities or simulated movement of students or staff. These exercises may include orientation or seminars, which introduce emergency plans, roles, responsibilities, and expectations; workshops, which are used to develop, review, or refine emergency plans, procedures, or interagency agreements; and tabletop exercises, in which participants discuss response actions, coordination, and decision-making during a simulated emergency scenario.

Operations-based exercises are designed to test and validate emergency response procedures through action-based activities. These exercises may include drills, which test a single emergency function, such as evacuation, lockdown, or shelter-in-place, but which shall not involve the use of blanks, simulated weapons, or the active participation of community emergency response partners reenacting response actions; functional exercises, which test command, control, coordination, and communication during a simulated incident and may involve limited participation by community partners reenacting their specific response roles, without full deployment of personnel or equipment; and full-scale exercises, which involve a simulated emergency scenario using personnel, equipment, and the coordinated participation of all community partners that would be expected to respond to that specific incident.

~~Cross ReferencesE-1.1E-1.1G ReferencesLa.~~ Within the first thirty (30) instructional days of each school year, each principal shall conduct a safety drill to rehearse the components of the plan, including an active assailant scenario. In addition, each school year, each principal shall conduct at least one additional drill during high traffic or transition points in the school day. Not later than seven (7) days after each drill, the principal shall submit a written report summarizing the details of the drill to the Superintendent. The Superintendent or emergency response coordinator shall provide feedback on the drill to the principal, who shall consider the feedback in revising the plan.

Each plan shall provide that:

1. The door of each classroom and other instructional space shall be locked and secured to prevent entry into the room where it is occupied by students, ex except between class periods when students are moving between classrooms and other instructional spaces. If a classroom or other instructional space is left unlocked or open for any other reason, the door shall be actively staffed by an authorized person standing or seated at the door. Classroom doors with locks shall be in compliance with legislatively enacted code requirements and all fire safety standards promulgated by the office of state fire marshal. Each plan shall provide that a locked door shall not obstruct egress. “Locked and secured” means that no devices or obstacles are present which would prevent the door locking mechanism from being fully engaged as a vision of the designed or intended.
2. If legislative funding is provided, bleeding control kits shall be placed in easily accessible locations in each school; and,
3. The principal shall designate employees to be trained in the proper use of a bleeding control kit and in traumatic injury response.

A person acting in good faith who administers aid for a traumatic injury, including through the use of a bleeding control kit, shall be immune from criminal and civil liability for the administration, unless personal injury results from the gross negligence or willful or wanton misconduct in the administration of aid.

Each school year, each principal shall be responsible for providing a workshop, which may be incorporated into a meeting or training session held for another purpose, for all teachers and school employees pertaining to the plan and shall involve local law enforcement, fire, public safety, and emergency preparedness officials in the preparation and presentation of the training. The training shall include an active assailant exercise. The training shall be reported to the Superintendent and the Louisiana Department of Education.

Each principal shall keep a copy of the approved plan in his office. The plan shall be accessible to the state Department of Education and Louisiana Center for Safe Schools upon request. The principal and shall provide a copy to the following individuals and departments, each of whom shall be responsible for keeping in his/her respective office a copy of the plan that is readily accessible in the event of a school shooting or other violent incident or emergency situation:

1. The President of the School Board;
2. The Superintendent; and,
3. The chief of police of the municipality or the sheriff of the parish where the school is located, as applicable, as well as the local fire chief whose office is in closest geographic proximity to the school.

The School Board may adopt rules and regulations as it deems necessary to provide for the implementation of the provisions of this Plan.

Each school shall complete an annual school safety questionnaire developed and distributed by the Louisiana Center for Safe Schools in partnership with the Louisiana Department of Education. The questionnaire shall request information related to the school's compliance with plan requirements, completion of required drills, and identified needs related to emergency response and preparedness. Upon completion of the school-level questionnaire by each school, the School Board shall complete a district-level questionnaire. Both the school-level and district-level questionnaires shall be submitted to the Department and the Center at a date and frequency to be determined.

SCHOOL MAPPING DATA

Upon preparing a school crisis management and response plan in accordance with La. Rev. Stat. Ann. §.17:416.16 the School Board, or a vendor, shall submit a copy of the most recent blueprints and school mapping data of each school building and facility in the school system, to each local law enforcement agency with jurisdiction over any portion of the school governing authority, each local and state public safety and emergency preparedness office, the Louisiana Center for Safe Schools, and to the school's office for use in response to emergencies.

All aspects of the school mapping data shall be collected, produced and stored within the United States of America.

For the purposes of this section, the following terms shall have the following meanings:

First responders means local, state, and federal law enforcement agencies, fire, public safety, and emergency preparedness officials.

School mapping data means information provided in an electronic or digital format to assist first responders in responding to emergencies at public schools.

The school mapping data provided shall do all of the following:

1. Be compatible with software platforms used by local, parish, state, and federal public safety agencies that provide emergency services to the specific school for which the data is provided without requiring such agencies to purchase additional software or requiring a fee to view or access the data.
2. Be compatible with security software platforms in use by the specific school for which the data is provided without requiring public safety agencies or school districts to purchase additional software or requiring a fee to view or access the data.
3. Be available in a printable format.
4. Be verified by the entity producing the data for accuracy by a walk-through of school buildings and grounds.
5. Be oriented true north.
6. Be overlaid on current aerial imagery.
7. Contain site-specific labeling that matches the structure of school buildings including room labels, hallway names, and external door or stairwell numbers and locations of hazards, critical utility locations, key boxes, automated external defibrillators, and trauma kits.
8. Contain site-specific labeling that matches the school grounds including parking areas, athletic fields, surrounding roads, and neighboring properties.
9. Be overlaid with gridded "x" and "y" coordinates.

School mapping data shall not be modified or updated independently without corresponding updates to school mapping data within software platforms used by local, parish, state, and federal public safety agencies that provide emergency services to the specific school.

Blueprints, school emergency operations plans, and school mapping data of public school buildings or facilities shall not be subject to the Public Records Law.

OTHER EMERGENCY DRILLS

The City of Baker School Board shall require procedures be planned by the principal and faculty of each school to assure orderly movement and evacuation of students to the safest area in the event of fire, weather, or other disasters. Practice drills shall be used to ensure the effectiveness of the procedures.

Every separate administration building shall conduct practice drills as well.

Latest revised**Revised April 14, 2026**

▶ Full revision history (5 entries)

Cross References

- E-1.1
- E-1.1G

References

- La. Rev. Stat. Ann. §§17:416.16, 17:416.16.1, 29:726.5, 29:726.5.1, 40:1578.6
- *Louisiana School Transportation Specifications and Procedures*, Bulletin 119
- *Louisiana Handbook for School Administrators*, Bulletin 741, Louisiana Department of Education
- *Life Safety Code*, National Fire Protection Association

Board Minutes

- Board minutes, 5-3-16, 3-3-20, 4-14-26.

H-3.5

Discipline

LEGISLATIVE UPDATE - DRAFT - August 7, 2026

It is the purpose of the City of Baker School Board to operate the schools in a manner that will provide an orderly process of education and that will provide for the welfare and safety of all students who attend these schools. The school's primary goal is to educate, not discipline; however, when the behavior of the individual student comes in conflict with rights of others, corrective actions may be necessary both for the benefit of that individual and the school as a whole.

The City of Baker School Board shall endeavor to address student behavior with a focus on evidence-based interventions and supports, and to prioritize classroom- and school-based interventions in lieu of out-of-school disciplinary removals to address student misconduct in order to minimize the loss of academic instructional time. Every teacher and other school employee shall endeavor to hold each student accountable for his/her behavior in school, or on the playgrounds of the school, on any school bus, on the street or while going to or returning from school, during intermission or recess, or at any school sponsored activity or function.

To assist the teacher, the School Board shall establish regulations for the use of disciplinary measures within the schools and continually monitor and appraise their usefulness. Discipline shall be administered uniformly, consistently, and in a nondiscriminatory manner, in accordance with the School Board's *Student Code of Conduct.*

Principals shall have both the authority and the duty to take disciplinary action whenever the behavior of any student(s) materially interferes with or substantially disrupts the maintenance of a proper atmosphere for learning within the classroom or other parts of the school. However, no student shall be disciplined in any manner by the School Board or school administrator, teacher, or other school employee for the use of force upon another person when it can be reasonably concluded that the use of such force more probably than not was committed solely for the purpose of preventing a forcible offense against the student or a forcible offense provided that the force used shall be reasonable and apparently necessary to prevent such offense. A student who is the aggressor or who brings on a difficulty cannot claim the right stated above to defend himself/herself.

Each teacher may take disciplinary action to correct a student who violates school rules~~,~~ or who interferes with an orderly education process. The disciplinary action taken by the teacher shall be in accordance with such regulations and procedures established by the School Board.

Each school shall annually provide written notice at the beginning of each school year to each teacher and school employee, including bus operators, of their rights to take or request disciplinary action against a student. Notice shall include eligibility for sick and personal leave in the event that a school employee is injured by a student who committed an assault or battery against a teacher.

Disciplinary action by a school employee may include, but is not limited to:

1. Oral or written reprimands.

2. Referral for a counseling session which shall include but shall not be limited to conflict resolution, social responsibility, family responsibility, peer mediation, and stress management.

3. Written notification of parents of disruptive or unacceptable behavior, a copy of which shall be provided to the principal.

4. Other disciplinary measures approved by the principal and faculty of the school and in compliance with School Board policy.

STUDENT REMOVAL FROM CLASSROOM

When a student's behavior prevents the orderly instruction of other students, poses an immediate threat to the safety of students or the teacher, or when a student violates the school's code of conduct the teacher may have the student immediately removed from his/her classroom and placed in custody of the principal or his/her designee.

Any student removed from class in kindergarten through grade five shall not be permitted to return to class for at least thirty (30) minutes unless agreed to by the teacher initiating the disciplinary action. A student removed from class in grades six through twelve shall not be permitted to return to class during the same class period, unless agreed to by the teacher initiating the disciplinary action.

Whenever a teacher is struck by a student, the student, in addition to any other discipline given, shall be permanently removed from the teacher's classroom, unless the teacher objects, or unless the principal, with the concurrence of the building level committee, finds the striking incident to be entirely inadvertent.

Upon the student being removed from class and sent to the principal's office, the principal or designee shall advise the student of the particular misconduct of which he is accused as well as the basis for such accusation, and the student shall be given an opportunity at that time to explain his/her version of the facts. The principal or his/her designee then shall conduct a counseling session with the student as may be appropriate to establish a course of action, consistent with School Board policy to identify and correct the behavior for which the student is being disciplined.

Once removed, the student shall not be readmitted to the classroom until the principal has implemented at least one of the following disciplinary measures:

1. Conferencing with the principal or his/her designee.
2. Referral to counseling.
3. Peer mediation.
4. Referral to the school building level committee.
5. Restorative justice practices.
6. Loss of privileges
7. Detention
8. In-school suspension
9. Out-of-school suspension
10. Initiation of expulsion hearings
11. Referral for assignment to an alternative setting
12. Requiring the completion of all assigned school work and homework that would have been assigned and completed by the student during the period of out-of-school suspension.
13. Any other disciplinary measure authorized by the principal with the concurrence of the teacher or building level committee.

Parental Notification

The principal or his/her designee shall provide oral or written notification to the parent or legal guardian of any student removed from the classroom. Such notification shall include a description of any disciplinary action taken.

When a student has been removed from a classroom, the teacher or the principal or his/her designee may require the parent, or legal guardian of the student to have a conference with the teacher or the principal or his/her designee before the student is readmitted. Such conference may be in person or by telephone or other virtual means.

Upon the student's *third* removal from the same classroom, the teacher and principal shall discuss the disruptive behavior patterns of the student and the potentially appropriate disciplinary measure before the principal implements a disciplinary measure. In addition, a conference between the teacher or other appropriate school employee and the student's parent, or legal guardian may be required prior to the student being readmitted to that same classroom. Such conference may be in person or by telephone or other virtual means. If such conference is required by the school, the school shall give written notice to the parent.

For students who experience multiple behavioral incidents or disciplinary referrals, a principal or his designee shall consider a referral of the matter to an appropriate school building level committee. If the disruptive behavior persists, the teacher may request that the principal transfer the student into another setting.

STUDENT MISCONDUCT AT END OF YEAR

Any non-graduating student who commits offenses during the last ten (10) days of the school year which carry recommendations for suspension or expulsion beyond the end of the school year shall have such recommendation extended into the next school year.

Any graduating senior who commits a serious major or criminal infraction after the last regular class period as upheld by the Superintendent or his/her designee shall be excluded from year-end activities, including graduation exercises. Diplomas may be given or mailed to the student after the close of the school year. Seniors shall be made aware of this policy prior to the final exam period and a notice of the policy shall be mailed to parents from the school.

PARENT CONFERENCES

In any case where a teacher, principal, or other school employee is authorized to **require** the parent or legal guardian of a student to attend a conference or meeting regarding the student's behavior, and after notice, the parent or legal guardian willfully refuses to attend, the principal, or his/her designee, shall file a complaint, in accordance with statutory provisions, with a court exercising juvenile jurisdiction. *Notice* of the conference, specifying the time and date of the conference, shall be given by contacting the parent or legal guardian by telephone at the telephone number shown on the student's registration card or by sending a certified letter to the address shown on the student's registration card.

REPORTS TO PRINCIPAL

Any teacher or other school employee may report to the principal any student who acts in a disorderly manner or is in violation of school rules, or any misconduct or violation of school rules by a student who may or may not be known to the teacher or employee. Incidents of alleged discipline violations shall be reported on the *School Behavior Report*/*School Bus Behavior Report* form provided by the Louisiana Department of Education. The forms shall be submitted in accordance with procedures outlined by the School District, the Superintendent, and school system personnel. The principal shall review and act upon such information submitted, to determine if suspension or other disciplinary action is necessary.

Should the principal fail to act on any report of misconduct or school violation, he/she shall explain the reasons for doing so to the Superintendent or his/her designee and to the teacher or school employee, student, parent, or legal guardian reporting the violation.

DELINQUENT STUDENTS

Students who regularly disrupt the normal school environment shall be considered as delinquent, and may be reported by appropriate school personnel to the juvenile court. Any student that exhibits disruptive behavior, an incorrigible attitude, or any other discipline problems in general may be recommended by the principal for expulsion, assignment to an appropriate alternative educational placement, or transfer to adult education if the student is:

1. Seventeen (17) years of age or older with less than five (5) units of credit toward graduation;

2. Eighteen (18) years of age or older with less than ten (10) units of credit toward graduation; or

3. Nineteen (19) years of age or older with less than fifteen (15) units of credit toward graduation.

RECUSAL OF ADMINISTRATOR IN DISCIPLINE MATTERS

Any school administrator or administrator's designee who is required to make a recommendation, decide an issue, or take action in a matter involving the discipline of a student shall recuse himself/herself whenever a member of the immediate family of the administrator or administrator's designee is involved in any manner in the discipline matter. In case of recusal, the action to be taken shall be done so by the Superintendent or an impartial designee of the Superintendent.

Immediate family means the individual's children, brothers, sisters, parents, and spouse and the children, brothers, sisters, and parents of the spouse.

DISCIPLINE OF STUDENTS WITH DISABILITIES OR EXCEPTIONALITIES

Discipline of students with disabilities or exceptionalities, or an Individualized Education Program or Section 504 Individualized Accommodation Plan, shall be to the extent allowed by applicable state or federal law and regulations or the provisions of the student's specific plan.

DISCIPLINE OF STUDENTS ENGAGED IN VIRTUAL INSTRUCTION

The School Board shall adopt disciplinary measures that define the rules of conduct and expectations of students engaged in virtual instruction, including clearly defined consequences of conduct, and shall take into consideration the students' and their families' rights to privacy and other constitutional rights while at home or in a location that is not school property. Any such disciplinary measures adopted by the School Board shall be included in the policy *Discipline of Students Engaged in Virtual Instruction*.

DEFINITIONS

Out-of-school suspension means the removal of a student from all classes of instruction on public school grounds and all other school-sponsored activities.

In-school suspension means removing a student from his/her normal classroom setting but maintaining him under supervision within the school. Students participating in in-school suspension shall receive credit for work performed during the in-school suspension. However, any student who fails to comply fully with the rules for in-school suspension may be subject to immediate out-of-school suspension.

Detention shall mean activities, assignments, or work held before the normal school day, after the normal school day, or on weekends. Failure or refusal by a student to participate in assigned detention may subject the student to immediate out-of-school suspension. Assignments, activities, or work which may be assigned during detention include, but are not limited to, counseling, homework assignments, behavior modification program, or other activities aimed at improving the behavior and conduct of the student.

Expulsion (unless otherwise defined as a permanent expulsion by law) shall mean the removal of a student from school for at least one school semester. During an expulsion the Superintendent shall place the student in an alternative school or in an alternative educational placement.

Firearm means any pistol, revolver, rifle, shotgun, machine gun, submachine gun, blackpowder weapon, or assault rifle that is designed to fire or is capable of firing fixed cartridge ammunition or from which a shot or projectile is discharged by an explosive.

Virtual instruction means instruction provided to a student through an electronic delivery medium, including, but not limited to, electronic learning platforms that connect to a student in a remote location to classroom instruction.

Latest revised**Revised: July 13, 2022**

▶ Full revision history (6 entries)

Cross References

- B-13

References

- 42 USC 12112 et seq. (*Equal Opportunity for Individuals with Disabilities)*
- 42 USC 12132 et seq. (*Discrimination in Public Places*)
- La. Rev. Stat. Ann. §§17:223, 17:224, 17:233, 17:239, 17:252, 17:416, 17:416.1, 17:416.13

Regulations for Implementation of the Exceptional Children's Act, Bulletin 1706, Louisiana Department of Education

Board Minutes

- Board minutes, 4-4-00, 11-3-09, 6-1-10, 5-3-16, 5-4-21, 8-3-21, 7-13-22

CITY OF BAKER SCHOOL SYSTEM

REQUEST FOR APPLICATIONS (RFA) – APPLICATION PACKET

Cooperative Endeavor Agreement (CEA) Professional Services Contractor

Federal Programs • Compliance • Accountability • Special Education • Early Childhood

SECTION 1 — APPLICANT INFORMATION

Applicant/Organization Name: ____

Primary Contact Person: ____

Title/Role: ____

Mailing Address: ____

City/State/Zip: ____

Phone Number: ____

Email Address: ____

Website (if applicable): ____

SECTION 2 — COVER LETTER

Attach a formal cover letter addressed to:

City of Baker School System

Office of Federal Programs

Attn: Dr. Kartina J. Roberts, Director

Email: kroberts@bakerschools.org

Your cover letter must include:

- Summary of interest in the Cooperative Endeavor Agreement
- Overview of relevant experience
- Statement of capacity to meet CBSS timelines and deliverables
- Signature of authorized representative

SECTION 3 — QUALIFICATIONS & EXPERIENCE

Provide the following:

A. Resume

Attach a resume (individual contractor) showing qualifications and experience

B. Relevant Experience

Describe experience in the following areas:

- IDEA Compliance
- SPED/IEP/IAP Monitoring
- EdLink Reporting
- eSER Validation
- eGMS Grant Management
- Risk management and Type III partnership oversight
- Policy and procedure implementation

C. Evidence of Expertise

Attach documentation demonstrating proficiency with:

- EdLink
- eSER/SER
- eGMS
- IDEA/ESSA/EDGAR compliance
- Louisiana accountability systems

SECTION 4 — DESCRIPTION OF SERVICES

Provide a detailed narrative describing how you will fulfill the Scope of Work:

A. Compliance & Monitoring

Explain your approach to monitoring IDEA, SPED, IEP, IAP, and related grants.

B. Data & Reporting

Describe your process for ensuring accurate, timely federal/state submissions.

C. Grant Management

Outline your method for secondary review and oversight in eGMS.

D. Governance & Risk Management

Explain how you will support Type III partnerships and district policy implementation.

E. School Support

Describe how you will provide technical assistance to CBSS schools.

SECTION 5 — PROPOSED FEE STRUCTURE

Provide a clear fee proposal:

- Hourly rate: ________________________________
- Monthly retainer: ____________________________
- Project-based fee (if applicable): _____________
- Additional costs or reimbursables: _____________

Attach a detailed cost breakdown for a minimum six month contract, maximum 12 month contract not to exceed $25,000.

SECTION 6 — REFERENCES

Provide **three professional references** familiar with similar work.

Reference 1

Name: ____

Organization: ____

Phone: ____

Email: ____

Relationship: ____

Reference 2

Name: ____

Organization: ____

Phone: ____

Email: ____

Relationship: ____

Reference 3

Name: ____

Organization: ____

Phone: ____

Email: ____

Relationship: ____

SECTION 7 — REQUIRED DOCUMENTS

Attach the following:

- W-9
- Any additional compliance documents

SECTION 8 — CERTIFICATION & SIGNATURE

I certify that all information provided in this application is true, complete, and accurate to the best of my knowledge. I understand that submission of this application does not guarantee award of a Cooperative Endeavor Agreement.

Applicant/Authorized Representative Name: ______________________________

Signature: ____

Date: ____

SECTION 9 — SUBMISSION INSTRUCTIONS

Submit the complete packet **(MAXIMUM EIGHT (8) PAGES)**

by: **5:00 P.M. Thursday, July 30, 2026**

Electronically to:

City of Baker School System

Office of Federal Programs

Attn : Dr. Kartina J. Roberts, Director

Email : kroberts@bakerschools.org

CITY OF BAKER SCHOOL SYSTEM

"Building Baker Forward"

Date: August 12, 2026

To: J.T. Stroder, Superintendent
City of Baker School System

From: Dr. Kar-tina Roberts, Director
Federal Programs | Accountability | Compliance | Special Education

RE: Recommendation to Award a Professional Services Contract – Cooperative Endeavor Agreement to *ACTion Educational Services, LLC*

Final Evaluation Score Sheet

City of Baker School System

Professional Services Contractor RFA Evaluation Summary

Applicant	Score
ACTion Educational Services, LLC	92/100
Next Theory Advising, LLC	89/100

Final Ranking

Rank	Applicant	Recommendation
#1	***ACTion Educational Services, LLC***	**Recommendation for Award**
#2	Next Theory Advising, LLC	Not Recommended

Applications For a Cooperative Endeavor Agreement (CEA) Professional Services Contractor: The City of Baker School System, Federal Program Office conducted an open solicitation accepting applications for a *Cooperative Endeavor Agreement (CEA) Professional Services Contractor* to support federal programs, compliance, accountability, and data-quality operations on July 21, 2026.

Interested applicants were allowed to download the full *Request for Applications (RFA)* and submit all required documents by **5:00 PM on July 30, 2026,** to Dr. Kartina Roberts, CBSS Director, Federal Programs at kroberts@bakerschools.org. The solicitation was open to all qualified professionals. As required all submissions received must follow the guidelines outlined in the RFA. Interested applicants were informed that submission of an application does not guarantee an award.

Open Solicitation Process: The solicitation process closed at 5:00 PM on July 30, 2026. At that time two RFAs were received. Two applicants submitted proposals for consideration:

1. *ACTion Educational Services, LLC*
2. *Next Theory Advising, LLC*

Peer Reviewers: Both RFAs were reviewed by CBSS Office of Federal Program Staff:

1. Ms. Taurus Ross, Federal Programs Compliance and Inventory Assistant, and
2. Dr. Kartina Roberts, Federal Program Director.

Peer Review Evaluation Rubric: Based on the RFA requirements, a 100-point evaluation rubric was used that emphasizes if the applicant demonstrated expertise, compliance knowledge, service approach, and cost effectiveness while maintaining procurement transparency and consistency.

Scoring Rubric - City of Baker School System Professional Services Contractor - Cooperative Endeavor Agreement RFA Evaluation Scoring Guide (Maximum Score: 100 Points)

Evaluation Criteria	**Points Possible**
1. Cover Letter & Organizational Capacity	10
2. Qualifications & Relevant Experience	30
3. Technical Approach / Scope of Services	35
4. Cost Proposal	15
5. References	5
6. Completeness & Compliance of Submission	5
TOTAL	**100**

(See Attachments for Scoring Rubric Requirements.)

Demonstrated Qualifications and Experience: Both applicants demonstrated qualifications and experience in federal grants administration, compliance monitoring, technical assistance, and organizational support. However, one applicant demonstrated the following key strengths and the strongest alignment:

- Former Director of State and Federal Programs
- Former Louisiana Department of Education Program Consultant
- Direct IDEA compliance experience
- Direct SPED, IEP, and IAP monitoring experience
- Direct eSER validation experience
- Direct EdLink reporting experience
- Extensive eGMS Grant management expertise.
- Demonstrated experience implementing internal compliance monitoring systems.
- Demonstrated the strongest alignment with the RFA's required scope of work and
- Possesses the most relevant experience in Special Education compliance, federal program monitoring, and Louisiana accountability systems.

Comprehensive Review and Evaluation: After thoroughly reviewing both application materials, qualifications, relevant experience, technical approach, cost proposals, and references submitted by each applicant, the highest - ranked candidate scored 92/100.

Recommendation: ACTion Educational Services, LLC is recommended by the Federal Program Office for approval by the City of Baker School System Superintendent and presentation to the Board for approval of the *Professional Service Contract* funded through the line-item appropriation contained in *Act 461* of the *2025 RLS Cooperative Extension Agreement* awarded to the City of Baker School System for Educational Resource Learning.

Justification of Selected Recommendation: This recommendation is based on the degree to which each applicant's experience aligns with the specific requirements outlined in the RF and the scope of workplaces significant emphasis on *IDEA compliance*, *Special Education* oversight, *IEP* and *IAP* monitoring, *eSER* validation, *EdLink* reporting, *eGMS* grant management, risk management, and federal program accountability systems. These areas represent the primary responsibilities associated with the requested services.

ACTion Educational Services, LLC

Evaluation Category	Points
Cover Letter & Organizational Capacity	10/10
Qualifications & Relevant Experience	29/30
Technical Approach / Scope of Services	30/35
Cost Proposal	13/15
References	5/5
Completeness & Compliance	5/5
TOTAL	**92/100**

Extensive and Direct Experience in All Areas: ACTion Educational Services, LLC, demonstrated extensive and direct experience in these critical areas. The firm's principal consultant, Ms. Aleshia Taylor, has served as a Director of State and Federal Programs, a Louisiana Department of Education (LDOE) Education Program Consultant, and a district-level educational leader. Her professional background includes direct responsibility for federal grant administration, IDEA compliance, fiscal oversight, eGMS management, compliance monitoring systems, school improvement planning, and technical assistance to local education agencies throughout Louisiana.

Direct experience in Special Education Compliance: Most notably, *ACTion Educational Services, LLC,* provided evidence of direct experience with Special Education compliance, *IEP* and *IAP* processes, *eSER* validation, *EdLink* reporting support, and implementation of internal monitoring systems designed to ensure compliance with state and federal requirements. These qualifications closely mirror the services requested by the City of Baker School System and position the consultant to provide immediate support with minimal onboarding or transition time.

Ranked Number One Applicant: Based on the totality of the evaluation, *ACTion Educational Services LLC* was ranked as the **Number One Applicant** and is recommended to the City of Baker School System Leadership to be awarded the Cooperative Endeavor Agreement Professional Services Contract to *ACTion Educational Services, LLC* for a term not to exceed twelve (12) months and a contract amount not to exceed $25,000, subject to successful contract negotiations and School Board approval.

Thank you for your consideration of this recommendation. Please feel free to contact me should you require any additional information regarding the evaluation process or supporting documentation.

Respectfully submitted,

Dr. Kar-tina Roberts

Dr. Kartina J. Roberts
Director of Federal Programs
City of Baker School System

Attachments

1st RFA - *ACTion Educational Services, LLC* **– Recommended for Approval**

The following evaluation narrative supports the committee's decision to rank *ACTion Educational Services, LLC* as the #1 applicant and recommend the firm for award based on its demonstrated experience and alignment with the RFA requirements.

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1. Cover Letter & Organizational Capacity (10/10)

Strengths
- Submitted a professional cover letter that directly addressed the requirements of the RFA.
- Clearly articulated interest in partnering with the City of Baker School System.
- Demonstrated extensive experience in Federal Programs, Compliance, Accountability, and Educational Leadership.
- Provided evidence of capacity to meet district timelines and deliverables.
- Demonstrated understanding of district and state accountability expectations.

Weaknesses
- None

Why Ranked Highest

The applicant clearly demonstrated both the experience and organizational capacity necessary to immediately support the district's Federal Programs Office with minimal transition time.

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2. Qualifications & Relevant Experience (29/30)

Strengths
- Former Director of State and Federal Programs with direct responsibility for federally funded initiatives.
- Former Louisiana Department of Education (LDOE) Education Program Consultant with experience supporting local education agencies statewide.
- More than twenty years of educational leadership experience.
- Demonstrated expertise in:
  - IDEA Compliance
  - SPED Compliance
  - IEP/IAP Processes
  - EdLink Reporting
  - eSER Validation
  - eGMS Management
  - ESSA Compliance
  - EDGAR Requirements
  - Fiscal Oversight
  - Internal Controls
  - School Improvement Planning
  - Federal Monitoring Systems
  - Technical Assistance to Districts

- Experience is directly connected to the specific services requested in the RFA.

Weaknesses
- Limited direct evidence of serving as the lead administrator for a Type III partnership arrangement.
- Some experience descriptions could have included additional measurable outcomes or performance data.

Why Ranked Highest

The applicant possessed the strongest direct experience in the specialized areas identified within the RFA. Unlike competing proposals, *ACTion* provided documented experience specifically related to IDEA compliance, Special Education oversight, eSER validation, and district-level Federal Programs leadership.

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3. Technical Approach / Scope of Services (30/35)

Strengths
Compliance & Monitoring
- Demonstrated understanding of compliance monitoring requirements.
- Proposed internal reviews, corrective action support, and monitoring preparation activities.

Data & Reporting
- Identified processes for data validation and accountability reporting.
- Demonstrated prior experience supporting state and federal reporting requirements. Grant Management
- Extensive experience managing eGMS grant applications, amendments, reimbursement requests, and fiscal monitoring.
- Demonstrated direct federal grants administration experience.

Governance & Risk Management
- Demonstrated experience implementing internal controls and compliance structures.
- Showed knowledge of accountability systems and fiscal safeguards.

School Support
- Demonstrated experience providing technical assistance, training, coaching, and leadership support to schools and districts.

Weaknesses
- Technical proposal was less detailed than other applicants' submission.
- Deliverables and performance measures were not described as extensively as the competing proposal.
- Limited discussion of project-management methodology and reporting structure.

Why Ranked Highest

Although the proposal was not as detailed as other applicants' technical narrative, the experience supporting the proposed services was more directly connected to the actual responsibilities identified in the RFA. The evaluation emphasized demonstrated capability over proposal length.

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4. Cost Proposal (13/15)

Strengths
- Proposed cost complied with the RFA's maximum contract amount of $25,000.
- Monthly retainer structure was straightforward and easy to administer.
- Pricing appeared reasonable considering the applicant's level of experience and expertise.
- Provided value through access to highly specialized federal programs expertise.

Weaknesses
- Limited detailed cost breakdown.
- Did not provide extensive information regarding monthly deliverables associated with the retainer.
- Cost narrative was less detailed than that provided by another applicant.

Why Ranked Highest

Despite minor weaknesses, the proposed pricing was reasonable, compliant, and supported by qualifications that closely matched the district's needs.

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5. References (5/5)

Strengths
- Three professional references were provided.
- References represented experience in educational leadership, state-level education work, and grant administration.
- References were relevant to the scope of services requested.

Weaknesses
- No significant weaknesses identified.

Why Ranked Highest

References supported the applicant's extensive background in educational leadership, state compliance work, and federal program oversight.

---

6. Completeness & Compliance (5/5)

Strengths

- Submitted all required application components.
- Included resume, qualifications, references, fee proposal, certification, and supporting documentation.
- Submission complied with the page limitation requirement.
- Included required W-9 documentation. Weaknesses
- No significant weaknesses affecting responsiveness were identified.

Why Ranked Highest

The submission was complete, responsive, and addressed all required components of the RFA.

Evaluation Committee Summary

ACTion Educational Services, LLC was recommended as the highest-ranked applicant because it demonstrated the strongest overall alignment with the specific requirements of the RFA. The applicant provided direct and substantial experience in IDEA compliance, SPED/IEP/IAP oversight, eSER validation, EdLink reporting, federal grants management, Louisiana Department of Education compliance requirements, and district-level Federal Programs administration. While another applicant submitted a more detailed technical proposal, *ACTion Educational Services, LLC* demonstrated deeper and more directly relevant experience in the specialized service areas that are central to the City of Baker School System's needs.

Final Score: 92/100
Final Ranking: 1 Ranked Applicant
Recommended for Award

2nd RFA – *Next Theory Advising* - Not Recommended

Next Theory Advising (NTA) demonstrated expertise in federal grant administration, compliance systems, performance monitoring, project management, technical assistance, and organizational effectiveness. The proposal was strong in the areas of governance, communication, deliverables, and continuous improvement planning. However, much of *Next Theory Advising's* experience centers on Career and Technical Education, Perkins V administration, Workforce Development Initiatives, and Postsecondary Partnerships. While these experiences are valuable and relevant to grant administration, they do not provide the same level of direct experience in IDEA compliance, Special Education monitoring, eSER validation, and related federal program functions that are central to this solicitation, nor did they present the strongest overall alignment with the specialized requirements outlined in the RFA and the immediate needs of the CBSS Office of Federal Programs.

***Next Theory Advising, LLC* Scoring Rubric**

Evaluation Category	Points
Cover Letter & Organizational Capacity	10/10
Qualifications & Relevant Experience	24/30
Technical Approach / Scope of Services	31/35
Cost Proposal	14/15
References	5/5
Completeness & Compliance	5/5
TOTAL	**89/100**

Key Strengths

- Strong federal grants administration background.
- Excellent project management and reporting framework.
- Significant Perkins V and workforce development experience.
- Strong compliance and technical assistance model.

Areas of Consideration

- Limited direct IDEA compliance experience compared to other applicants.
- Limited direct SPED/IEP/IAP monitoring experience.
- Limited direct eSER validation experience.
- Experience is more heavily concentrated in Career and Technical Education, Perkins V administration, and workforce development systems.

Strengths and Weaknesses by Evaluation Category

1. Cover Letter & Organizational Capacity (10/10)

Strengths

- Submitted a professional and comprehensive cover letter.
- Clearly articulated interest in partnering with the City of Baker School System.
- Demonstrated capacity to manage projects, meet deadlines, and communicate responsively.
- Provided a strong organizational capacity statement and quality assurance approach.

Weaknesses

- No significant weaknesses identified in this category.

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2. Qualifications & Relevant Experience (24/30)

Strengths

- Current Louisiana Department of Education (LDOE) Education Program Consultant.
- Successfully administered a $1 million+ Perkins V federal grant portfolio.
- Extensive experience in grant administration, compliance monitoring, reporting, audit readiness, and stakeholder engagement.
- Strong experience providing technical assistance and supporting federal program implementation.

Weaknesses

- Limited direct IDEA compliance experience compared to another applicant.
- Limited direct SPED, IEP, and IAP monitoring experience or direct Special Education oversight
- References to special populations were largely connected to Perkins V administration
- Limited evidence of direct eSER validation experience.
- Limited evidence of direct EdLink administration and reporting responsibilities.
- No documented experience serving as a Director of Federal Programs or Special Education administrator.
- Type III partnership oversight experience was indirect rather than directly managed. Reason for

Point Deduction: While highly qualified in grants administration, the applicant's experience was less directly aligned with the Special Education and federal monitoring requirements that form the core of the RFA.

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3. Technical Approach / Scope of Services (31/35)

Strengths

- Detailed technical proposal.
- Clearly defined deliverables and monitoring procedures.
- Strong governance, risk management, and compliance-monitoring framework.
- Included project management processes, expectations, and performance measures.
- Demonstrated a structured approach to capacity building and technical assistance.

Weaknesses

- Technical approach relied heavily on consulting methodologies rather than demonstrated implementation experience in IDEA and Special Education monitoring.
- Limited discussion of specific eSER validation processes.
- Limited evidence of previous responsibility for district-level Special Education compliance reviews or corrective action monitoring.

Reason for Point Deduction: Less direct evidence of RFA specified compliance performing functions.

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4. Cost Proposal (14/15)

Strengths

- Competitive pricing is within the RFA limit.
- Monthly retainers are clearly defined.
- Hourly rate identified.
- Clear explanation of services included under contract.
- Addressed reimbursable expenses and scope modifications.

Weaknesses

- Did not provide a detailed month-by-month service plan tied to the proposed contract budget.

5. References (5/5)
Strengths

- Three professional references provided.
- References reflected professional experience in higher education and public-sector administration.

Weaknesses

- No significant weaknesses identified.

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6. Completeness & Compliance (5/5)
Strengths

- Submitted all required application components.
- Included cover letter, resume, qualifications narrative, service descriptions, references, pricing information, and certification documentation.

Weaknesses

- No significant weaknesses identified.

Evaluation Committee Summary Statement

Next Theory Advising, LLC submitted a strong responsive proposal and demonstrated expertise in federal grants management, compliance systems, technical assistance, and organizational improvement. However, they did not exceed another applicant ranked higher which demonstrated more direct and extensive experience in the specific service areas identified in the RFA, including IDEA compliance, SPED/IEP/IAP monitoring, eSER validation, EdLink reporting, and district-level Federal Programs administration.

SCORING RUBRIC

1. Cover Letter & Organizational Capacity (10 Points)

Rating	Points	Description
Excellent	9-10	Clearly demonstrates interest, understanding of CBSS needs, relevant experience, and capacity to meet timelines and deliverables.
Good	6-8	Addresses most required elements with adequate detail.
Fair	3-5	Limited detail or weak demonstration of capacity.
Poor	0-2	Missing key information or fails to demonstrate capacity.

Requirements include summary of interest, relevant experience, ability to meet timelines, and authorized signature

2. Qualifications & Relevant Experience (30 Points)
A. Education, Credentials & Resume (10 Points)

Points	Rating
9-10	Extensive qualifications and directly related experience
6-8	Strong qualifications with related experience
3-5	Limited qualifications or experience
0-2	Minimal evidence of qualifications

B. Relevant Experience Areas (20 Points)
Evaluate demonstrated expertise in:

- IDEA Compliance
- SPED/IEP/IAP Monitoring
- EdLink Reporting
- eSER Validation
- eGMS Grant Management
- Risk Management
- Type III Partnership Oversight
- Policy and Procedure Implementation

3. Technical Approach / Scope of Services (35 Points)
A. Compliance & Monitoring (10 Points)
Assessment of approach to:

- IDEA compliance
- SPED monitoring
- IEP/IAP oversight
- Federal grant compliance

B. Data & Reporting (8 Points)
Assessment of methodology for:

- EdLink reporting
- State and federal submissions
- Data quality assurance
- Error prevention and correction

C. Grant Management (7 Points)
Assessment of:

- eGMS oversight
- Secondary review process
- Budget monitoring
- Compliance controls

D. Governance & Risk Management (5 Points)
Assessment of:
- Type III partnership support
- Policy implementation
- Internal controls
- Risk mitigation strategies

E. School Support & Technical Assistance (5 Points)
Assessment of:
- Responsiveness
- Training and coaching
- Capacity-building for schools
- Communication methods
- Overall Technical Rating Scale

Points	Rating
31-35	Exceptional
24-30	Strong
17-23	Adequate
0-16	Limited

4. Cost Proposal (15 Points)
Evaluation:
- Hourly rate
- Monthly retainer
- Project-based costs
- Overall value
- Cost reasonableness
- Detailed six- to twelve-month budget
- Compliance with not-to-exceed amount of $25,000

Points	Rating	Description
13-15	Excellent Value	Highly competitive pricing with clear cost justification.
10-12	Good Value	Reasonable pricing and adequate detail.
6-9	Fair Value	Costs are acceptable but less competitive.
0-5	Poor Value	Excessive costs or insufficient detail.

5. References (5 Points)

Points	Description
5	Excellent references verifying similar work and performance.
3-4	Positive references with some relevant experience verified.
1-2	Limited or mixed references.
0	References unavailable or unsatisfactory.

Three professional references are required.

6. Completeness & Compliance of Submission (5 Points)

Points	Requirement
2	All required sections completed
1	Required documents included (resume, W-9, supporting documents)
1	Submission follows page limit and instructions
1	Application signed and certified

ACTion Educational Services, LLC

Professional Consulting Proposal

Cooperative Endeavor Agreement w/The City of Baker School System

SECTION 1: APPLICANT INFORMATION

Applicant/Organization Name: ACTion Educational Services, LLC
Primary Contact Person: Aleshia C. Taylor
Title/Role: Owner/Operator
Mailing Address: 3437 Ash St.
City/State/Zip: Zachary, LA 70791
Phone Number: 225-276-6720
Email Address: actioneducational@gmail.com

SECTION 2: COVER LETTER

Dear Dr. Kartina J. Roberts,

ACTion Educational Services, LLC is pleased to submit this proposal to enter into a cooperative endeavor agreement to provide professional consulting services to the City of Baker School System in the areas of Federal Programs, Compliance and Accountability. As a former Director of State and Federal Programs and former Louisiana Department of Education Program Consultant, I bring extensive experience supporting Louisiana school systems with federal grant administration, fiscal compliance, monitoring, accountability, and continuous improvement.

My experience includes administering federal grants, developing compliance monitoring systems, supporting eGMS budgeting and reimbursements, implementing internal controls, providing technical assistance, and collaborating with district and school leaders to improve student outcomes. I am committed to providing timely, responsive, and high-quality support that enables the City of Baker School System to remain compliant while maximizing available resources.

Thank you for your consideration. I welcome the opportunity to partner with the City of Baker School System.

Respectfully,

Aleshia C. Taylor, M.Ed.
Principal Consultant
ACTion Educational Services, LLC

SECTION 3: QUALIFICATIONS & EXPERIENCE

Resume

Aleshia C. Taylor — Servant Leader

aleshiataylor@att.net *225-276-6720 · Zachary, LA*

Strategic education leader with more than 20 years of experience leading federal programs, grants management, compliance, accountability, and school improvement initiatives in Louisiana public education. Proven track record of partnering with school boards, district leaders, principals, and community stakeholders to strengthen organizational capacity, ensure regulatory compliance, and improve student outcomes. Former Director of State and Federal Programs and Louisiana Department of Education Program Consultant with expertise in IDEA, ESSA, EDGAR, eGMS grant administration, fiscal oversight, data reporting, and continuous improvement. Recognized for building collaborative partnerships, implementing effective compliance systems, and providing high-quality technical assistance that supports district goals and long-term success.

Professional Expertise:

√ Federal Programs Administration & Compliance	√ eGMS Grant Administration	√ Fiscal Compliance
√ IDEA Compliance	√ Validation & Monitoring	√ School Improvement Planning
√ ESSA Compliance	√ Internal Controls	√ Policy & Procedure Implementation

Professional Experience

ACTion Educational Services, LLC *· Zachary, LA · October 2017 - Present*

Owner/Manager

- Provides professional learning support to school districts, school leaders, teachers and support staff
- Designs and delivers professional development for administrators and staff on best practices in mathematics and student interventions.
- Supports development and revision of district curriculum and supports the implementation of high-quality curricula
- Collaborates with cross-functional teams to streamline processes, improve educational outcomes for students
- Analyzes data and program performance metrics to guide decision-making and provide technical assistance and accountability to improve student outcomes.

Louisiana Special School District *·Baton Rouge, LA · December 2024 - September 2025*

Director of State and Federal Programs (December 2024 - September 2025)

Responsible for properly allocating, managing, overseeing and implementing all federally funded programs.

Key Accomplishments:

- Developed and implemented key compliance structures to ensure fiscal compliance of over $1.8 million dollars in federal funding
- Worked collaboratively with schools to secure $20,000 in grant funding for computer science initiative
- Implemented an internal monitoring system for all federal funds.
- Worked collaboratively with schools and other district staff to create continuous school improvement plans.
- Strategically aligned federal funds to match the needs of the students.

Louisiana Department of Education *·Baton Rouge, LA · January 2021 - December 2024*

Education Program Consultant - Operations (January 2024 - December 2024)

Served as liaison for all divisions across the agency. Responsible for providing leadership, oversight and recommendations to processes that impact the overall flow of the Super App application.

Key Accomplishments:

- Organized the standard operating procedures for the upcoming 2025-2026 Super App application.

Education Program Consultant - Federal Support and Grantee Relations (January 2021 - January 2024)

Served as the administrator for several grants within the department of grants management and ensures that districts adhere to all fiduciary responsibilities to maximize the impact on students; Responsible for ensuring that competitive grant applications are submitted to fund state-level and district-level priorities and secures discretionary funding to support those strategic activities; Approves grant applications, monitors progress and budget revisions of assigned applications.

Key Accomplishments:

- Created, trained and supported LEAs around how to organize and complete required data reporting for all ESSER grant funds
- Facilitated oversight and management of organizational processes that have helped to eliminate waste within our division
- Facilitated the successful implementation of automated mass communications to all LEAs surrounding available funding

***GEO FOUNDATION** · Baton Rouge, LA · February 2019 - September 2020*

Founding Principal, GEO Next Generation High School

Served as a change agent willing to challenge the status quo. Instituted clear goals and a vision that promotes high academic achievement and success for all students and staff. Supervised and monitored all instructional programs and school-based finances. Provided leadership, coaching, and instructional support to teachers, students and parents. Guided administrative decisions impacting the school. Observed and facilitated instructional feedback to teachers and monitored curriculum implementation, assessments and data tracking to improve student achievement. Analyzed benchmark data and provided instructional adjustments.

Key Accomplishments:

- Recruited and maintained 105 founding students by establishing a positive climate and culture
- Implemented a continuous improvement system to accurately assess instructional needs to ensure all students learn at their highest potential
- Increased the number of career academy course offerings that will lead to industry-based certifications
- Increased the number of ninth grade students enrolled in dual credit courses from six to fifteen in one school year
- Increased the number of standards-based, high-quality course offerings: ninth graders taking Algebra II; 10th graders taking college Algebra; 17 percent of first-time freshman earned three or more college credit hours; three percent of the ninth-grade students earned 18 college credit hours
- Created the master schedule to include high levels of student achievement through rigorous and engaging classes, as well as implemented a remediation/acceleration period during the regular school day to address the different learning needs of students reflected by the benchmarks.
- Provided high-quality professional learning opportunities based on school instructional plans, learning targets, achievement data, and classroom observations
- Created a data-rich environment, disaggregated, analyzed, and tracked all teacher effectiveness and student data for continuous improvement
- Assisted, supported, and monitored school leadership teams in the development and implementation of academic plans
- Identified school challenges and trends to make curricular and instructional adjustments.
- Offered free summer enrichment learning opportunities to all students to preload academic skills as well as to close instructional gaps
- Developed, evaluated, and made recommendations to the CEO regarding policies and procedures governing the operation of the school
- Communicated and developed relationships with parents and all stakeholders

***EAST BATON ROUGE PARISH SCHOOLS** ·Baton Rouge, LA, · August 2006 - February 2019*

K-12 Math Supervisor/Curriculum and Instruction Project Management Leader (April 2014 - February 2019)

Served as the K-12 Math Supervisor for the district and worked closely with the district leaders, principals, teacher leaders, teachers and other stakeholders to develop and support quality academic programs for traditionally underserved students. Managed all K - 12th grade math curriculum vetting and selection of high-quality math curriculum. Managed all federal flow-through grants that provided opportunities for teacher growth and development. Provided on-going professional learning experiences for teachers and administrators. Supported school leaders and teachers by observing, providing feedback, coaching and modeling best practices in the classroom. Improved teaching and learning for all students. Worked collaboratively with district and school level leadership teams to implement the district's school improvement initiatives. Identified critical and emerging issues related to math curriculum, instruction and school improvement and followed up with the district leaders on recommendations for effective acquisition and utilization of findings. Served as a member of the district-level recruitment team whereby I assisted with recruiting and retaining high-quality teachers.

Key Accomplishments:

- Facilitated, organized, and led district-wide core content instructional materials adoption and implementation process
- Coordinated instructional materials vendor and school leader selection process
- Managed a team of ten instructional specialist during a leadership transition and high leverage curriculum decision- making priorities
- Represented Assistant Superintendent of Curriculum and Instruction as designee with various stakeholders, district leaders, and school leaders
- Worked collaboratively with Assistant Superintendent of Curriculum and Instruction and other district leaders to organize, allocate and manage departmental budgets, title II professional development budgets, striving readers budget and all curricular resource material budgets
- Worked collaboratively with the Director of Professional Development to plan, organize, schedule and deliver high-quality professional learning to new teachers at the Smart Start Conference
- Worked collaboratively with all content areas to build and model solid cross-curricular connections
- Partnered and presented with HMH to share district success on a national level
- Reviewed and analyzed data and made instructional recommendations to principals to further assist with creating instructional support plans that could improve student achievement
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Education

SOUTHEASTERN LOUISIANA UNIVERSITY | Hammond, LA

Bachelor of Science; Math Education (1998); Master of Education; Education Administration (2003);
+30 Certification; Supervision & Child Welfare & Attendance (2006)

Relevant Experience

Experience Area	Description of Experience
IDEA Compliance	Supported IDEA compliance through strategic allocation of grant funds, review of allowable expenditures, resource alignment, and monitoring of program implementation in accordance with Louisiana Department of Education guidance, IDEA regulations, EDGAR, and Uniform Guidance.
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ACTion Educational Services, LLC proposes to partner with the City of Baker School System to provide expert consulting in Federal Programs, IDEA, ESSA and grants approaches that emphasizes proactive compliance, practical technical assistance, responsive customer service, practical problem solving and sustainable systems that strengthen district capacity while ensuring adherence to state and federal requirements.

Evidence of Expertise

Louisiana Special School District

July 14, 2025

Re: Recommendation for Aleshia Taylor

Greetings Hiring Manager,

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Respectfully submitted,

David Martin, Ed.D.
Superintendent

2888 Brightside Dr. Baton Rouge, LA 70820
www.SSDofLA.com

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SECTION 5: PROPOSED FEE STRUCTURE

Fee Proposal

Contract Amount: $25,000
Contract Term: 12 Months
Monthly Retainer: $2,083.33
Monthly retainer includes federal program consultation, support and technical assistance. Full scope and deliverables will be discussed once proposal is approved.

SECTION 6: REFERENCES

Reference 1 Name: Dr. Ni'Shawn Stovall Organization: East Baton Rouge Parish School System Phone: 225-205-4152 Email: nstovall@ebrschools.org Relationship: Colleague	**Reference 2** Name: Tonya Johnson Organization: Louisiana Department of Education Phone: 225-252-6181 Email: tonya.johnson@la.gov Relationship: Former co-grant project managers	**Reference 3** Name: Dr. Quentina Timoll Organization: University View Academy 225-955-4177 qtimoll@gmail.com Relationship: Former supervisor

SECTION 7: REQUIRED DOCUMENTS – see p. 8 for w-9

SECTION 8: CERTIFICATION & SIGNATURE

I certify that all information provided in this application is true, complete, and accurate to the best of my knowledge. I understand that submission of this application does not guarantee award of a Cooperative Endeavor Agreement.

Applicant/Authorized Representative Name: Aleshia C. Taylor

Signature: ____________________

Date: July 23, 2026

SECTION 9: SUBMISSION INSTRUCTIONS

Submit the complete packet **(MAXIMUM (8) PAGES)**
by **5:00 P.M. Thursday, July 30, 2026**
Electronically to:
City of Baker School System
Office of Federal Programs
Attn: Dr. Katrina J. Roberts, Director
Email: kroberts@bakerschools.org

Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

► Go to *www.irs.gov/FormW9* for instructions and the latest information.

Give Form to the requester. Do not send to the IRS.

Print or type.
See **Specific Instructions** on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
Aleshia C. Taylor

2 Business name/disregarded entity name, if different from above
ACTion Educational Services, LLC.

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☑ Individual/sole proprietor or single-member LLC ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► ______

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ►

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) ______

Exemption from FATCA reporting code (if any) ______

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.
3437 Ash St.

Requester's name and address (optional)

6 City, state, and ZIP code
Zachary, LA 70791

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN,* later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number
___ – __ – ____

or

Employer identification number
8 7 – 0 8 7 4 6 9 5

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here **Signature of U.S. person ►** Verified by pdfFiller Aleshia C. Taylor 01/29/2022 **Date ►** 01/29/2022

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9.*

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, *later.*

ACTion Educational Services, LLC

Professional Consulting Proposal

Cooperative Endeavor Agreement w/The City of Baker School System

SECTION 1: APPLICANT INFORMATION

Applicant/Organization Name: ACTion Educational Services, LLC
Primary Contact Person: Aleshia C. Taylor
Title/Role: Owner/Operator
Mailing Address: 3437 Ash St.
City/State/Zip: Zachary, LA 70791
Phone Number: 225-276-6720
Email Address: actioneducational@gmail.com

SECTION 2: COVER LETTER

Dear Dr. Kartina J. Roberts,

ACTion Educational Services, LLC is pleased to submit this proposal to enter into a cooperative endeavor agreement to provide professional consulting services to the City of Baker School System in the areas of Federal Programs, Compliance and Accountability. As a former Director of State and Federal Programs and former Louisiana Department of Education Program Consultant, I bring extensive experience supporting Louisiana school systems with federal grant administration, fiscal compliance, monitoring, accountability, and continuous improvement.

My experience includes administering federal grants, developing compliance monitoring systems, supporting eGMS budgeting and reimbursements, implementing internal controls, providing technical assistance, and collaborating with district and school leaders to improve student outcomes. I am committed to providing timely, responsive, and high-quality support that enables the City of Baker School System to remain compliant while maximizing available resources.

Thank you for your consideration. I welcome the opportunity to partner with the City of Baker School System.

Respectfully,

Aleshia C. Taylor, M.Ed.
Principal Consultant
ACTion Educational Services, LLC

SECTION 3: QUALIFICATIONS & EXPERIENCE

Resume

Aleshia C. Taylor — Servant Leader

aleshiataylor@att.net — *225-276-6720 · Zachary, LA*

Strategic education leader with more than 20 years of experience leading federal programs, grants management, compliance, accountability, and school improvement initiatives in Louisiana public education. Proven track record of partnering with school boards, district leaders, principals, and community stakeholders to strengthen organizational capacity, ensure regulatory compliance, and improve student outcomes. Former Director of State and Federal Programs and Louisiana Department of Education Program Consultant with expertise in IDEA, ESSA, EDGAR, eGMS grant administration, fiscal oversight, data reporting, and continuous improvement. Recognized for building collaborative partnerships, implementing effective compliance systems, and providing high-quality technical assistance that supports district goals and long-term success.

Professional Expertise:

√ Federal Programs Administration & Compliance	√ eGMS Grant Administration	√ Fiscal Compliance
√ IDEA Compliance	√ Validation & Monitoring	√ School Improvement Planning
√ ESSA Compliance	√ Internal Controls	√ Policy & Procedure Implementation

Professional Experience

ACTion Educational Services, LLC *· Zachary, LA · October 2017 - Present*

Owner/Manager

- Provides professional learning support to school districts, school leaders, teachers and support staff
- Designs and delivers professional development for administrators and staff on best practices in mathematics and student interventions.
- Supports development and revision of district curriculum and supports the implementation of high-quality curricula
- Collaborates with cross-functional teams to streamline processes, improve educational outcomes for students
- Analyzes data and program performance metrics to guide decision-making and provide technical assistance and accountability to improve student outcomes.

Louisiana Special School District *·Baton Rouge, LA · December 2024 - September 2025*

Director of State and Federal Programs (December 2024 - September 2025)

Responsible for properly allocating, managing, overseeing and implementing all federally funded programs.

Key Accomplishments:

- Developed and implemented key compliance structures to ensure fiscal compliance of over $1.8 million dollars in federal funding
- Worked collaboratively with schools to secure $20,000 in grant funding for computer science initiative
- Implemented an internal monitoring system for all federal funds.
- Worked collaboratively with schools and other district staff to create continuous school improvement plans.
- Strategically aligned federal funds to match the needs of the students.

Louisiana Department of Education *·Baton Rouge, LA · January 2021 - December 2024*

Education Program Consultant - Operations (January 2024 - December 2024)

Served as liaison for all divisions across the agency. Responsible for providing leadership, oversight and recommendations to processes that impact the overall flow of the Super App application.

Key Accomplishments:

- Organized the standard operating procedures for the upcoming 2025-2026 Super App application.

Education Program Consultant - Federal Support and Grantee Relations (January 2021 - January 2024)

Served as the administrator for several grants within the department of grants management and ensures that districts adhere to all fiduciary responsibilities to maximize the impact on students; Responsible for ensuring that competitive grant applications are submitted to fund state-level and district-level priorities and secures discretionary funding to support those strategic activities; Approves grant applications, monitors progress and budget revisions of assigned applications.

Key Accomplishments:

- Created, trained and supported LEAs around how to organize and complete required data reporting for all ESSER grant funds
- Facilitated oversight and management of organizational processes that have helped to eliminate waste within our division
- Facilitated the successful implementation of automated mass communications to all LEAs surrounding available funding

***GEO FOUNDATION** · Baton Rouge, LA · February 2019 - September 2020*

Founding Principal, GEO Next Generation High School

Served as a change agent willing to challenge the status quo. Instituted clear goals and a vision that promotes high academic achievement and success for all students and staff. Supervised and monitored all instructional programs and school-based finances. Provided leadership, coaching, and instructional support to teachers, students and parents. Guided administrative decisions impacting the school. Observed and facilitated instructional feedback to teachers and monitored curriculum implementation, assessments and data tracking to improve student achievement. Analyzed benchmark data and provided instructional adjustments.

Key Accomplishments:

- Recruited and maintained 105 founding students by establishing a positive climate and culture
- Implemented a continuous improvement system to accurately assess instructional needs to ensure all students learn at their highest potential
- Increased the number of career academy course offerings that will lead to industry-based certifications
- Increased the number of ninth grade students enrolled in dual credit courses from six to fifteen in one school year
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Superintendent

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SECTION 7: REQUIRED DOCUMENTS – see p. 8 for w-9

SECTION 8: CERTIFICATION & SIGNATURE

I certify that all information provided in this application is true, complete, and accurate to the best of my knowledge. I understand that submission of this application does not guarantee award of a Cooperative Endeavor Agreement.

Applicant/Authorized Representative Name: Aleshia C. Taylor

Signature: Aleshia Taylor

Date: July 23, 2026

SECTION 9: SUBMISSION INSTRUCTIONS

Submit the complete packet **(MAXIMUM (8) PAGES)**
by **5:00 P.M. Thursday, July 30, 2026**
Electronically to:
City of Baker School System
Office of Federal Programs
Attn: Dr. Katrina J. Roberts, Director
Email: kroberts@bakerschools.org

Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

► Go to *www.irs.gov/FormW9* for instructions and the latest information.

Give Form to the requester. Do not send to the IRS.

Print or type. See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
Aleshia C. Taylor

2 Business name/disregarded entity name, if different from above
ACTion Educational Services, LLC.

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☑ Individual/sole proprietor or single-member LLC ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► ________

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ►

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) ________

Exemption from FATCA reporting code (if any) ________

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.
3437 Ash St.

Requester's name and address (optional)

6 City, state, and ZIP code
Zachary, LA 70791

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN,* later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number
___ – __ – ____

or

Employer identification number
8 7 – 0 8 7 4 6 9 5

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here **Signature of U.S. person ►** Verified by pdfFiller Aleshia C. Taylor 01/29/2022 **Date ►** 01/29/2022

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9.*

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, *later.*

Tessica Johnson, M.A.

Baton Rouge, LA | 225-910-3977 | tessica@nexttheoryadvising.com

EDUCATION GRANTS | FEDERAL COMPLIANCE | PROGRAM ADMINISTRATION | DISTRICT SUPPORT

Education grants and compliance professional with 10+ years of experience leading federal and state-funded initiatives across K–12 education, higher education, workforce development, and public-sector organizations. Experienced in administering multimillion-dollar grant portfolios, ensuring regulatory compliance, monitoring program implementation, supporting audit readiness, and providing technical assistance to education partners. Recognized for strengthening operational systems, improving reporting accuracy, and aligning grant resources with organizational priorities to improve educational outcomes.

CORE COMPETENCIES

Federal Grant Administration • Grant Compliance • Program Monitoring • Federal & State Reporting • Audit Preparation • Budget Administration • Fiscal Compliance • Continuous Improvement • Technical Assistance • Education Policy Implementation • School Operations • Performance Measurement • Data Analysis • Stakeholder Engagement • Community Partnerships • Project Management • Inventory Accountability

Technology: Microsoft 365 • Advanced Excel • Power BI • Google Workspace • Monday.com • Asana

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PROFESSIONAL EXPERIENCE

Louisiana Department of Education

Education Program Consultant 3 – Career & College Readiness | 2025–Present

- Administer statewide Career and College Readiness initiatives supporting dual enrollment, Fast Forward, postsecondary readiness, and industry credential attainment.
- Coordinate implementation among local education agencies, postsecondary institutions, workforce partners, and internal agency divisions to ensure alignment with state priorities.
- Monitor statewide implementation, participation trends, and performance outcomes to support continuous program improvement.
- Prepare executive reports and quantitative analyses to support agency leadership and statewide accountability efforts.
- Provide technical assistance and policy guidance to education partners regarding program implementation, compliance expectations, and state initiatives.
- Collaborate across divisions to coordinate strategic initiatives, monitor deliverables, and maintain program effectiveness.

Baton Rouge Community College

Carl Perkins Grant Administrator | Region 2 CTE Coalition Director | 2022–2025

- Administered a **$1M+ Perkins V federal grant portfolio**, ensuring compliance with federal regulations, state requirements, and institutional policies.
- Managed grant budgets, reimbursement documentation, expenditure monitoring, fiscal accountability, and funding allocations.
- Prepared grant applications, annual plans, amendments, performance reports, and supporting compliance documentation.
- Coordinated implementation across **16 school districts**, three postsecondary institutions, workforce agencies, and business partners.
- Maintained audit-ready documentation supporting federal monitoring visits and compliance reviews.
- Oversaw inventory accountability for federally funded equipment and assets.
- Evaluated program performance using Perkins indicators and institutional research to drive continuous improvement.
- Supervised professional staff and strengthened regional employer engagement by **40%**.

Next Theory Advising, LLC

Principal Consultant | 2025–Present

- Advise education agencies and nonprofit organizations on grant readiness, compliance planning, program development, and strategic implementation.
- Develop operational frameworks supporting performance measurement, reporting, and continuous improvement.
- Provide technical assistance on federal grant requirements, organizational capacity building, and program evaluation.
- Facilitate professional development on grant management, strategic planning, workforce development, and data-informed decision-making.

East Baton Rouge Parish Housing Authority

Family Self-Sufficiency Program Director | 2019–2022

- Directed administration of a federally funded Family Self-Sufficiency program while ensuring compliance with HUD regulations and grant requirements.
- Managed program documentation, participant records, compliance monitoring, and audit preparation.
- Coordinated partnerships with workforce agencies, educational institutions, employers, and community organizations.
- Designed operational tracking systems that increased compliance efficiency by **35%**.
- Prepared required reports, maintained grant documentation, and monitored program outcomes.

Earlier Experience

Parent Educator – Southern University Agricultural Research & Extension Center

Community & Family Content Area Specialist – East Baton Rouge Head Start

CSBG Workforce Development Specialist – Louisiana Workforce Commission

These roles included federal program implementation, compliance monitoring, technical assistance, community engagement, and grant-funded program support.

EDUCATION

Master of Arts, Sociology
Southern University and A&M College

Bachelor of Science, Sociology
Southern University and A&M College

CERTIFICATIONS

- Louisiana Notary Public
- Federal Grants Management (2022, 2025)
- HUD Housing Choice Voucher Certification
- HUD Service Coordination Certification

PROFESSIONAL LEADERSHIP

- Association for Career and Technical Education (ACTE)
  - IAED Fellow
  - Region IV Resolutions Committee
- National Coalition of 100 Black Women – MBR LEAD Cohort IV
- MetroMorphosis Urban Leadership Development Initiative – Cohort 12

Next Theory Advising, LLC

Strategic Insight. Measurable Impact.

Federal Programs & Compliance Consulting Services

Submitted to City of Baker School System

July 29, 2026

City of Baker School System
Attn: Dr. Kartina J. Roberts
Office of Federal Programs
Email: kroberts@bakerschools.org

Dear Dr. Roberts:

Next Theory Advising, LLC is pleased to submit this proposal in response to the City of Baker School System's Request for Applications for a Cooperative Endeavor Agreement Professional Services Contractor. Our mission is to help education organizations strengthen compliance, improve organizational systems, and build sustainable capacity that leads to stronger outcomes for students, families, and communities.

As Principal Consultant, I bring more than ten years of experience administering federal and state-funded programs across K–12 education, higher education, workforce development, and public-sector organizations. My experience includes statewide leadership with the Louisiana Department of Education, administration of a $1M+ Perkins V federal grant portfolio at Baton Rouge Community College, HUD-funded program administration, and consulting engagements through Next Theory Advising, the Louisiana Community and Technical College System, and Just Right Reader.

This also includes supporting Perkins V Special Populations, including students with disabilities, through recruitment, performance reporting, and initiatives designed to promote access to Career and Technical Education opportunities. This work required implementation of federal and state requirements, including ESSA, EDGAR, Bulletin 741, Bulletin 1530, and related Louisiana Department of Education guidance.

Relevant experience includes federal grant administration, eGMS grant management, compliance monitoring, audit readiness, technical assistance, executive reporting, stakeholder engagement, and continuous improvement planning. I have collaborated with local education agencies, postsecondary institutions, workforce organizations, and state partners to implement initiatives that improve accountability and organizational performance.

Capacity Statement

Next Theory Advising possesses the organizational capacity, technical expertise, and project management systems necessary to successfully fulfill the requirements of this Agreement. As Principal Consultant, I provide direct oversight of every engagement to ensure responsive communication, quality assurance, timely deliverables, and practical, solutions-oriented support. Our experience enables us to quickly assess district needs, strengthen compliance systems, and deliver measurable results while meeting all project timelines and expectations.

I welcome the opportunity to discuss our qualifications further.

Sincerely,

Tessica Johnson, M.A.
Principal Consultant

SECTION 3 – QUALIFICATIONS & EXPERIENCE

A. Resume

A current resume is attached and outlines my education, professional experience, certifications, and leadership roles relevant to this application.

B. Relevant Experience

IDEA Compliance
My experience supporting federally funded Career and Technical Education (CTE) programs has required ongoing collaboration with local education agencies to ensure equitable access and success for Perkins Special Populations, including students with disabilities. Through administration of the Carl D. Perkins Career and Technical Education Act (Perkins V), I monitored special population participation and performance, reviewed program outcomes, and provided technical assistance to support compliance with federal and state requirements. This work strengthened my understanding of the relationship between Perkins V, ESSA, IDEA, and student support systems.

SPED / IEP / IAP Monitoring
My responsibilities have included supporting Perkins Special Populations through recruitment, participation monitoring, performance reporting, and continuous improvement planning. I collaborated with school and postsecondary personnel to promote equitable access to Career and Technical Education programs and used performance data to identify barriers and improve student outcomes.

EdLink Reporting
My experience includes analyzing statewide education data, validating performance measures, reviewing accountability metrics, and supporting federal and state reporting requirements. I have consistently demonstrated the ability to quickly learn Louisiana education systems and successfully manage complex reporting and compliance processes.

eSER Validation
My professional experience includes reviewing documentation, monitoring compliance, validating supporting records, and ensuring federally funded programs maintained accurate and complete documentation. My background in compliance monitoring and documentation review has prepared me to effectively support districts utilizing electronic compliance systems.

eGMS Grant Management
Federal grant administration has been a central component of my career. As Carl D. Perkins Administrator at Baton Rouge Community College, I managed grant activities through Louisiana's eGMS system, including grant applications, budget revisions, reimbursement requests, performance reporting, fiscal monitoring, and supporting documentation. I also facilitated the Comprehensive Local Needs Assessment (CLNA), supported the Local Application Process (LAP), and worked with secondary and postsecondary partners to ensure compliance with federal grant requirements.

Risk Management & Type III Partnership Oversight
Throughout my career, I have worked collaboratively with school districts, postsecondary institutions, workforce organizations, nonprofit organizations, and governmental agencies to strengthen partnerships and improve program implementation. As Region II Career and Technical Education Coalition Director, I

coordinated regional collaboration among sixteen education and workforce partners while supporting accountability, documentation, compliance, and continuous improvement initiatives.

Policy & Procedure Implementation
My experience includes interpreting, implementing, and providing technical assistance related to federal and state education policies and regulations. Relevant experience includes implementation of the Carl D. Perkins Career and Technical Education Act (Perkins V), the Every Student Succeeds Act (ESSA), the Education Department General Administrative Regulations (EDGAR), Louisiana Bulletin 741, Louisiana Bulletin 1530, Louisiana Department of Education guidance, and institutional policies supporting program compliance, accountability, and continuous improvement.

C. Evidence of Expertise

The following documents and professional experiences demonstrate my qualifications to perform the requested services:

- Current professional resume outlining more than ten years of experience in education, federal programs, workforce development, and public administration.
- EDGAR Compliance Certificate demonstrating knowledge of federal education grant requirements.
- Professional experience administering federally funded Perkins V programs through Louisiana's eGMS system, including grant management, fiscal oversight, monitoring, and compliance.
- Statewide technical assistance and policy implementation experience with the Louisiana Department of Education.
- Experience facilitating Comprehensive Local Needs Assessments (CLNA), supporting Local Application Processes (LAP), and monitoring Perkins performance indicators.
- Consulting engagements through Next Theory Advising, LLC, including strategic planning, grant readiness, professional learning, and organizational development for education agencies and nonprofit organizations.
- Professional consulting services provided to the Louisiana Community and Technical College System and Just Right Reader, demonstrating experience delivering technical assistance, professional development, facilitation, and capacity-building services.

SECTION 4 – QUALIFICATIONS & EXPERIENCE

A. Compliance & Monitoring

Next Theory Advising employs a continuous compliance monitoring framework designed to strengthen district systems while ensuring adherence to applicable federal and state requirements. Our approach extends beyond identifying compliance concerns by helping districts establish sustainable internal processes that promote accountability, transparency, and continuous improvement.

Services include comprehensive reviews of program documentation, grant files, supporting evidence, internal controls, monitoring instruments, implementation practices, and applicable federal and state guidance. We evaluate compliance with program requirements, identify potential areas of risk, and provide actionable recommendations designed to strengthen program implementation while reducing audit findings and corrective actions.

Drawing upon extensive experience administering federally funded education programs, our monitoring process emphasizes collaboration with district leadership to develop practical solutions that improve operational effectiveness while maintaining compliance with applicable laws, regulations, grant requirements, and Louisiana Department of Education guidance.

Key Deliverables

- Program compliance reviews
- Monitoring reports with findings and recommendations
- Compliance checklists and documentation reviews
- Corrective action recommendations and follow-up support
- Monthly compliance status updates

B. Data & Reporting

Accurate and timely reporting is fundamental to effective federal program administration. Next Theory Advising provides technical assistance that strengthens data integrity, improves reporting processes, and supports informed decision-making at both the district and school levels.

Services include reviewing documentation for completeness and accuracy, validating supporting records, identifying discrepancies, strengthening internal quality assurance procedures, and assisting with corrective actions when necessary. We also assist districts in developing reporting practices that improve consistency across schools while supporting compliance with federal and state reporting expectations.

Our experience administering federal education programs has demonstrated that reliable data not only supports compliance but also informs strategic planning, resource allocation, program evaluation, and continuous improvement.

Key Deliverables

- Data quality reviews
- Reporting validation support
- Documentation verification
- Written recommendations for process improvement

- Reporting timelines and compliance tracking

C. Grant Management

Next Theory Advising provides comprehensive grant administration support throughout the entire grant lifecycle from planning and application development through implementation, monitoring, reporting, fiscal oversight, and closeout.

Our methodology is informed by extensive experience administering federally funded Carl D. Perkins Career and Technical Education grants through Louisiana's eGMS system. This experience includes facilitating Comprehensive Local Needs Assessments (CLNA), supporting Local Application Process (LAP) development, reviewing budgets and amendments, monitoring performance indicators, processing reimbursement documentation, maintaining audit-ready records, and providing technical assistance to local recipients.

We work collaboratively with district leadership to strengthen grant management practices, improve internal documentation systems, ensure timely submissions, and promote responsible stewardship of public funds while maintaining compliance with federal and state grant requirements.

Key Deliverables

- Grant application and amendment reviews
- Budget and reimbursement documentation review
- Grant implementation monitoring
- eGMS technical assistance
- Audit-ready documentation recommendations
- Grant management progress reports

D. Governance & Risk Management

Strong governance establishes the foundation for effective federal program administration. Next Theory Advising assists districts in strengthening organizational systems through policy review, procedural guidance, internal control assessments, partnership documentation review, and risk mitigation strategies. Our approach includes evaluating existing practices, identifying compliance vulnerabilities, recommending process improvements, and assisting leadership with implementation of policies that promote accountability, consistency, and operational excellence.

By proactively addressing compliance risks and strengthening organizational systems, districts are better positioned to maintain regulatory compliance, improve operational efficiency, and successfully implement federally funded initiatives.

Key Deliverables

- Policy and procedure review
- Internal control assessment
- Risk mitigation recommendations
- Governance documentation support

- Continuous improvement action plans

E. School Support

Next Theory Advising believes the most effective technical assistance empowers district and school personnel to confidently implement and sustain high-quality federal programs.

We provide individualized consultation, coaching, professional learning, implementation planning, documentation review, compliance guidance, and ongoing problem-solving support tailored to district needs. Technical assistance is delivered through a collaborative partnership model that emphasizes knowledge transfer, practical application, and continuous organizational learning.

Our experience providing statewide technical assistance, facilitating professional learning, supporting education leaders, and implementing complex federal initiatives enables us to quickly understand district needs and provide practical, solutions-oriented guidance that strengthens local capacity long after the engagement concludes.

Rather than simply assisting districts in achieving compliance, Next Theory Advising partners with educational leaders to build stronger systems, develop internal expertise, and create sustainable practices that improve student outcomes while ensuring responsible stewardship of federal resources.

Key Deliverables

- Individualized technical assistance
- Professional learning sessions
- Implementation guidance
- Resource development
- Technical assistance logs
- Capacity-building recommendations

F. Project Management & Communication

Next Theory Advising utilizes a collaborative project management approach that emphasizes responsiveness, transparency, and accountability. At the outset of the engagement, we will work with district leadership to establish priorities, communication protocols, deliverable timelines, and reporting expectations. Throughout the engagement, we will maintain regular communication, provide timely progress updates, document completed activities, and promptly respond to district requests.

Our goal is to function as an extension of the City of Baker School System's Office of Federal Programs by providing consistent support, practical guidance, and dependable project management that allows district staff to remain focused on serving students while maintaining compliance with applicable federal and state requirements.

G. Performance Measures

Next Theory Advising is committed to delivering measurable value throughout the engagement. Progress will be evaluated through ongoing collaboration with district leadership and demonstrated by:

- Timely completion of agreed-upon deliverables
- Improved compliance documentation and internal controls
- Reduced compliance findings and identified risks
- Increased staff capacity through technical assistance and coaching
- Timely submission of required reports and grant documentation
- Implementation of recommendations that strengthen program effectiveness and support continuous improvement

SECTION 5 – PROPOSED FEE STRUCTURE

Next Theory Advising, LLC offers a transparent, cost-effective pricing structure designed to provide the City of Baker School System with consistent access to experienced federal programs consulting and technical assistance. Our proposed fee supports ongoing compliance monitoring, grant administration, technical assistance, data reporting, governance support, project management, and strategic consultation throughout the duration of the Cooperative Endeavor Agreement.

Fee Category	Proposed Fee
Monthly Retainer	$2,083.33
Hourly Rate (Services Outside Agreed Scope)	$150.00
Project-Based Services	As mutually agreed upon by both parties
Additional Costs/Reimbursables	None without prior written approval by the City of Baker School System

Proposed Contract Cost

Contract Term	Monthly Retainer	Total Contract Value
Up to 12 Months	$2,083.33	**$25,000.00**

The proposed monthly retainer includes ongoing consultation, compliance monitoring, technical assistance, grant administration support, documentation review, virtual and in-person meetings (as mutually agreed), project management, progress reporting, and strategic guidance necessary to support the district's Office of Federal Programs.

Services requested outside the mutually agreed scope of work or contract limitations will only be performed upon written authorization from the City of Baker School System and, if applicable, through an approved contract amendment or separate agreement.

Next Theory Advising is committed to providing exceptional value by delivering practical, solutions-oriented consulting services that strengthen district capacity, improve compliance, mitigate organizational risk, and support the effective stewardship of federal resources. Our goal is to serve as a trusted strategic partner, helping the district build sustainable systems that extend beyond the term of this agreement while ensuring responsible use of public funds.

CITY OF BAKER SCHOOL SYSTEM

REQUEST FOR APPLICATIONS (RFA) – APPLICATION PACKET

Cooperative Endeavor Agreement (CEA) Professional Services Contractor

Federal Programs • Compliance • Accountability • Special Education • Early Childhood

SECTION 1 — APPLICANT INFORMATION

Applicant/Organization Name: Next Theory Advising, LLC

Primary Contact Person: Tessica Johnson

Title/Role: Principal Consultant

Mailing Address: 1632 N Plains Ave

City/State/Zip: Zachary, LA 70791

Phone Number: 225-910-3977

Email Address: Tessica@nexttheoryadvising.com

Website (if applicable): ____________________

SECTION 2 — COVER LETTER

Attach a formal cover letter addressed to:

City of Baker School System

Office of Federal Programs

Attn: Dr. Kartina J. Roberts, Director

Email: kroberts@bakerschools.org

Your cover letter must include:

- Summary of interest in the Cooperative Endeavor Agreement
- Overview of relevant experience
- Statement of capacity to meet CBSS timelines and deliverables
- Signature of authorized representative

SECTION 3 — QUALIFICATIONS & EXPERIENCE

Provide the following:

A. Resume

Attach a resume (individual contractor) showing qualifications and experience

B. Relevant Experience

Describe experience in the following areas:

- IDEA Compliance
- SPED/IEP/IAP Monitoring
- EdLink Reporting
- eSER Validation
- eGMS Grant Management
- Risk management and Type III partnership oversight
- Policy and procedure implementation

C. Evidence of Expertise

Attach documentation demonstrating proficiency with:

- EdLink
- eSER/SER
- eGMS
- IDEA/ESSA/EDGAR compliance
- Louisiana accountability systems

SECTION 4 — DESCRIPTION OF SERVICES

Provide a detailed narrative describing how you will fulfill the Scope of Work:

A. Compliance & Monitoring

Explain your approach to monitoring IDEA, SPED, IEP, IAP, and related grants.

B. Data & Reporting

Describe your process for ensuring accurate, timely federal/state submissions.

C. Grant Management

Outline your method for secondary review and oversight in eGMS.

D. Governance & Risk Management

Explain how you will support Type III partnerships and district policy implementation.

E. School Support

Describe how you will provide technical assistance to CBSS schools.

SECTION 5 — PROPOSED FEE STRUCTURE

Provide a clear fee proposal:

- Hourly rate: ______________________________
- Monthly retainer: $2,083.33
- Project-based fee (if applicable): 150.00
- Additional costs or reimbursables: ____________

Attach a detailed cost breakdown for a minimum six month contract, maximum 12 month contract not to exceed $25,000.

SECTION 6 — REFERENCES

Provide **three professional references** familiar with similar work.

Reference 1

Name: Dr. Donta Mills
Organization: Baton Rouge Community College
Phone: 225-266-9039
Email: millsd@mybrcc.edu
Relationship: Former Colleague

Reference 2

Name: Bland Washington
Organization: Baton Rouge Community College
Phone: 225-803-5585
Email: washingtonb@mybrcc.edu
Relationship: Former Colleague

Reference 3

Name: Doris Mejia
Organization: East Baton Rouge Parish Housing Authority
Phone: 225-436-7223
Email: dmejia@ebrpha.org
Relationship: Former Colleague

SECTION 7 — REQUIRED DOCUMENTS

Attach the following:

- W-9
- Any additional compliance documents

SECTION 8 — CERTIFICATION & SIGNATURE

I certify that all information provided in this application is true, complete, and accurate to the best of my knowledge. I understand that submission of this application does not guarantee award of a Cooperative Endeavor Agreement.

Applicant/Authorized Representative Name: Tessica Johnson

Signature: ______________________________

Date: July 29, 2026

SECTION 9 — SUBMISSION INSTRUCTIONS

Submit the complete packet **(MAXIMUM EIGHT (8) PAGES)**

by: **5:00 P.M. Thursday, July 30, 2026**

Electronically to:

City of Baker School System

Office of Federal Programs

Attn : Dr. Kartina J. Roberts, Director

Email : kroberts@bakerschools.org

City of Baker School System (CBSS)

Baker, Louisiana

District Attendance Coordinator

Job Description & LEA Funding Justification

Prepared for Superintendent and Board of Education Review

City of Baker School System | Office of the Superintendent

Confidential – Board Use Only | Prepared: June 25, 2026

PART 1

—

DISTRICT ATTENDANCE COORDINATOR: JOB DESCRIPTION

School System	City of Baker School System (CBSS)	Department	District Administration
Office	Office of the Superintendent	Classification	Non-Certified / Administrative Support
Position Title	District Attendance Coordinator	FLSA Status	Exempt
Reports To	Superintendent or Designee	Effective Date	[Board-Approved Date]

Position Summary

The District Attendance Coordinator is responsible for developing, implementing, and monitoring a comprehensive, district-wide student attendance strategy for the City of Baker School System. This position serves as the primary compliance officer for state and federal attendance reporting requirements, leads chronic absenteeism reduction initiatives, and coordinates with school principals, social workers, families, and community partners to ensure all students are present, engaged, and learning every day.

Essential Duties and Responsibilities

District-Wide Attendance Management

- Design, implement, and oversee a district-wide attendance intervention framework aligned with Louisiana Bulletin 741 and applicable federal requirements.
- Monitor daily, weekly, and cumulative attendance data across all CBSS campuses, including Type III charter schools authorized by CBSS.
- Identify trends in chronic absenteeism (missing 10% or more of school days) and develop targeted action plans at the student, school, and district levels.
- Maintain accurate, complete, and timely attendance records in compliance with the Louisiana Department of Education (LDOE) data reporting requirements.
- Coordinate and chair a District Attendance Review Committee meeting regularly to analyze data, assess intervention effectiveness, and revise strategies as needed.

Compliance and Reporting

- Ensure CBSS compliance with Louisiana Compulsory Attendance Law (R.S. 17:221–17:238), including proper documentation, notifications, and referral procedures.
- Prepare and submit all required attendance-related reports to the LDOE, including Student Counts, Membership Reports, and chronic absenteeism data.
- Maintain documentation for truancy referrals and coordinate with the City of Baker Municipal Court, district attorneys, and family services as required by law.
- Monitor and ensure the accuracy of attendance data submitted through the Student Information System (SIS) across all campuses.

Intervention and Family Engagement

- Develop and implement a tiered system of attendance interventions, from universal awareness campaigns to intensive case management for chronically absent students.
- Partner with school counselors, social workers, nurses, and community-based organizations to address barriers to attendance including transportation, housing instability, health challenges, and trauma.
- Design and lead family outreach programs that educate parents and guardians on the critical importance of consistent school attendance.
- Coordinate with local agencies (DCFS, healthcare providers, mental health services) to provide wraparound support for students with severe attendance challenges.

Professional Development and Collaboration

- Provide professional development and technical assistance to principals, assistant principals, teachers, and office staff on attendance policies, intervention strategies, and legal obligations.
- Collaborate with the district's Title I, IDEA, and McKinney-Vento coordinators to ensure attendance supports are equitably provided to all student subgroups.
- Serve as the district liaison for all attendance-related state and federal audits, monitoring visits, and program reviews.

Data Analysis and Program Evaluation

- Use attendance data to evaluate the effectiveness of intervention strategies and report findings to the superintendent and board.
- Prepare quarterly and annual attendance reports for board presentations, including trend analysis, subgroup comparisons, and recommended action steps.
- Ensure that all campus-level attendance personnel are trained, supported, and accountable for maintaining high-quality attendance records.

Minimum Qualifications

Education

- Bachelor's degree in education, social work, public administration, or a related field required; master's degree preferred. Louisiana teaching or administrator certificate preferred but not required.

Experience

- Minimum of five (5) years of experience in K–12 education, with demonstrated experience in attendance, student services, or school leadership.
- Experience with Louisiana Student Information Systems (e.g., PowerSchool, JCampus), LDOE reporting platforms, and data analysis preferred.

Knowledge, Skills, and Abilities

- Thorough knowledge of Louisiana Compulsory Attendance Law, LDOE attendance reporting requirements, and federal attendance-related mandates.
- Strong data analysis skills with the ability to translate attendance data into actionable strategies.
- Exceptional written and oral communication skills, including the ability to present data and recommendations to board members, administrators, and community stakeholders.
- Demonstrated ability to build collaborative relationships with families, community agencies, and school staff.
- Knowledge of trauma-informed practices and culturally responsive approaches to student support.

Working Conditions

This position requires regular travel to all CBSS campuses and may require evening or weekend availability for family engagement events and board meetings. The position is year-round (12-month).

Physical Requirements

Must be able to sit and stand for extended periods, operate standard office equipment, and travel by personal or district vehicle to school sites.

Salary and Benefits

Salary commensurate with education and experience per the CBSS Salary Schedule. Benefits include Louisiana Teachers' Retirement System (TRSL) or Louisiana School Employees' Retirement System (LSERS), health insurance, and paid leave per CBSS policy.

Approval Signatures

By signing below, the indicated officials confirm review and approval of this job description as authorized by the CBSS Board of Education.

Superintendent of Schools Date	Board President Date	Human Resources Director Date

Date of Board Approval:
