



THE  
**Intergenerational**  
S C H O O L S

## Intergenerational Schools

### May School Board Meeting 2026

Published on April 29, 2026 at 6:32 PM EDT

Amended on May 6, 2026 at 3:45 PM EDT

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#### Date and Time

Wednesday May 6, 2026 at 6:00 PM EDT

#### Location

Near West Intergenerational School  
3805 Terrett Avenue Cleveland, Ohio 44113

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The Intergenerational School creates, connects, and guides a multigenerational community of lifelong learners and spirited citizens as they strive for academic excellence.

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#### Agenda

	Purpose	Presenter	Time
<b>I. Board Resolutions</b>			<b>6:00 PM</b>
<b>A.</b> Board Resolutions for Schools			
<b>II. Opening Items</b>			<b>6:00 PM</b>
<b>A.</b> Record Attendance			
<b>B.</b> Call the Meeting to Order		Stacy Miller	
<b>C.</b> Mission Moment		Principals	4 m

	Purpose	Presenter	Time
<b>III. Public Comment</b>			<b>6:04 PM</b>
<b>A. Public Comment</b>	FYI		5 m
<p>Any person or group wishing to place an item on the agenda shall register their intent with the Executive Director/CEO (or designee-Chief Operating Officer) no later than five (5) days prior to the meeting and include:</p> <p>A. name and address of the participant;                      B. group affiliation, if and when appropriate;                      C. topic to be addressed</p>			
<b>IV. Sponsor Reports</b>			<b>6:09 PM</b>
<b>A. CMSD/ESCLEW Sponsor Report</b>	FYI		15 m
<ul style="list-style-type: none"> <li>• ESCLEW-Joyce Lewis</li> <li>• CMSD-Matt Rado                             <ul style="list-style-type: none"> <li>◦ Questions for Matt Rado wrt CMSD Board tabling NW sponsor contract, requesting to revisit sponsorship and partnership with charter schools                                     <ul style="list-style-type: none"> <li>▪ <a href="#">Link to CMSD April 28 Board Meeting</a> discussion 1:37-2:04</li> <li>▪ Tabled CMSD Resolution 10.03 Amending And Restating The Sponsorship Contracts Of Three Community Schools Sponsored By The Cleveland Municipal School District (including Near West)</li> <li>▪ Near West's current contract term ends 6/30/2027</li> <li>▪ Section F.5.b. No later than the 15th day of January in the year in which the Sponsor intends to non-renew the School's contract, the Sponsor shall notify the School of the proposed action in writing. The notice shall include the reasons for the proposed action in detail, the effective date of the termination or nonrenewal, and a statement that the School may, within 14 calendar days of receiving the notice, request in writing an informal hearing before the Sponsor.</li> </ul> </li> </ul> </li> </ul>			
<b>V. Consent Agenda (Please read Board Resolutions for Personnel Action detail)</b>			<b>6:24 PM</b>

	Purpose	Presenter	Time
<b>A.</b> Approval of Minutes: Regular Board Meeting- March 18, 2026	Vote	Stacy Miller	3 m
<b>B.</b> Annual Review & Approval of Policies NEW-Artificial Intelligence (AI) Policy	Vote		
<b>C.</b> Contracts & MOU's	Vote		

**TIS-East-ONLY:**

**RENEWAL NPG Consultants** to work with the TIS Principal on school strategic plan creation and execution, instructional coaching framework implementation, schoolwide priority teacher actions, alignment of instructional systems, and meaningful and relevant teacher professional development opportunities. This is an FY 26-27 budgeted expense beginning July 1, 2026, through April 2027 at a cost of \$15,000 to be paid out of general funds or other monies obtained.

**RENEWAL-Earl Ingram**, for services as an independent contractor, to provide basketball coaching and program management for the 25-26 school year with total compensation of \$1100. This is a budgeted expense payable from General Funds or other monies obtained.

**NWIS ONLY:**

**REVISED Blake Gilliam** to provide a one-on-one coaching session for the Principal that aligns with the OPES Standard 6 Equity and Cultural Responsiveness. This is a budgeted expense that will not exceed \$1500 and will be paid out of general funds or other monies obtained.

**TIS-East & Near West:**

**RENEWAL-FIT Technologies** for managed IT services and help desk support for a two-year contract term effective July 1, 2026, through June 30, 2028. Budgeted expense not to exceed \$142,133 per year to be split between the two schools (TIS-East = \$71,066.50, NWIS = \$71,066.50) and to be paid from general funds.

<b>D.</b> Personnel Actions	Vote		
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All information regarding personnel can be found in each school's resolution, attached above.

	Purpose	Presenter	Time
<b>E.</b> TIS-ONLY Sponsor Modification These modifications have been added to reflect the changes to the law.	Vote		
<b>F.</b> Near West Only: Reading Improvement Plan	Vote		
<b>G.</b> Annual Student Success & Wellness Narrative	Vote		
<b>VI. Finance</b>			<b>6:27 PM</b>
<b>A.</b> Approval of March Financials • March Financials	Vote	Celeste Farmer	5 m
<b>B.</b> 2026-2027 Schools Budgets	Vote	Brooke King	22 m
<b>C.</b> Staffing Update Discussion of Staffing Updates, open positions etc,	Discuss	Stacy Miller	
<b>D.</b> Update on Enrollment	FYI	Tameisha Wilson	
<b>VII. Education</b>			<b>6:54 PM</b>
<b>A.</b> Enrollment Policy Revision • There were changes in the law in December that all incoming kindergarteners must be 5 years old by the first day of school. • An additional change took place in March that schools may adopt an Early Entrance Policy and must determine a cutoff date for those children turning 5 after the first day of school, as well as an evaluation procedure. • This change in law will <ul style="list-style-type: none"> <li>◦ Impact enrollment</li> <li>◦ Behavioral and school readiness impact</li> <li>◦ The recommendation is October 31st.                             <ul style="list-style-type: none"> <li>▪ Our previous cut-off date was December 31st</li> </ul> </li> </ul>	Vote	Richaun Bunton	20 m
<b>B.</b> Proposed Shared Position of Director of Instruction & Student Experience	Discuss	Richaun Bunton	
<b>VIII. Governance</b>			<b>7:14 PM</b>

	Purpose	Presenter	Time
<b>A. Leadership Board Slate</b> Term will be July 1, 2026, through June 30, 2028  <ul style="list-style-type: none"> <li>• Danielle Clark-Chair</li> <li>• Richaun Bunton-Vice Chair</li> <li>• Steven Lake-Secretary</li> </ul> Near West Representative to Intergenerational Cleveland. Term will be July 1, 2026 to June 30, 2029  <ul style="list-style-type: none"> <li>• Brad Norton</li> </ul>	Vote	Robert Nicolay	7 m
<b>B. Nomination of Maya Claytor for at-large board member for Intergenerational Cleveland</b>	Vote	Robert Nicolay	3 m
<b>C. Schedule Board Strategy/Vision session</b>	Discuss	Stacy Miller	2 m
<b>IX. Task Force for Intergenerational Cleveland-School Service Agreement &amp; Structure</b>			<b>7:26 PM</b>
<b>A. IGClc Task Force Update</b>  Discussion for a vote on June 17, 2026	Discuss	Sarah Alonso, Amy Cascio	20 m
<b>X. Executive Session</b>			<b>7:46 PM</b>
<b>A. To consider the appointment, employment, dismissal, discipline, promotion, demotion or compensation of a public employee or official, or the investigation of charges or complaints against a public employee, official, licensee, or regulated individual, unless the employee, official, licensee, or regulated individual requests a public hearing by division (G)(1) of section 121.22 of the Revised Code.</b>	FYI	Stacy Miller, Brooke King	30 m
<b>XI. Closing Items</b>			<b>8:16 PM</b>
<b>A. Adjourn Meeting</b>	Vote	Stacy Miller	

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# Coversheet

## Board Resolutions for Schools

**Section:** I. Board Resolutions  
**Item:** A. Board Resolutions for Schools  
**Purpose:**  
**Submitted by:**  
**Related Material:** SIGNED-TIS Resolution.pdf  
SIGNED-NWIS Resolution.pdf



# Intergenerational S C H O O L S

May 6, 2026

## BOARD RESOLUTIONS

At the Regular Meeting of the Board of Directors of The Intergenerational School on May 6, 2026, the following resolutions were proposed and approved by the board:

**WHEREAS** the mission of The Intergenerational School is to connect, create, and guide a multigenerational community of lifelong learners and spirited citizens as they strive for academic excellence;

**WHEREAS** as a Public Charter School in the State of Ohio, and in accordance with Board policy, the Board of Directors must review and approve all Minutes, Policies, Personnel Actions that were not named specifically in the prior approved budget, Contract Actions and Expenses over \$25,000, Out of State travel, and transactions between Intergenerational Schools;

**IT IS THEREFORE RESOLVED** that The Intergenerational School Board has reviewed and approves the following:

### Consent Agenda

#### ~~Minutes of the Regular Board Meeting~~

- ~~March 18, 2026~~ **JULI**

#### **Approval of Policies**

- Artificial Intelligence (AI) Policy

#### **Contract and MOUs**

- **NPG Consultants** to work with the TIS Principal on school strategic plan creation and execution, instructional coaching framework implementation, schoolwide priority teacher actions, alignment of instructional systems, and meaningful and relevant teacher professional development opportunities. This is an FY 26-27 budgeted expense beginning July 1, 2026, through April 2027 at a cost of \$15,000 to be paid out of general funds or other monies obtained.
- **Earl Ingram**, for services as an independent contractor, to provide basketball coaching and program management for the 25-26 school year with total compensation of

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**The Intergenerational  
School - East**  
11327 SHAKER BLVD. SUITE 200E  
CLEVELAND, OHIO 44104

**Near West  
Intergenerational School**  
3805 TERRETT AVENUE  
CLEVELAND, OHIO 44113

\$1100. This is a budgeted expense payable from General Funds or other monies obtained.

- **FIT Technologies** for managed IT services and help desk support for a two-year contract term effective July 1, 2026, through June 30, 2028. Budgeted expense not to exceed \$142,133 per year to be split between the two schools (TIS-East = \$71,066.50, NWIS = \$71,066.50) and to be paid from general funds.

### **Personnel Actions**

- **Deandra Myers**, stipend for supplemental work as the Cheer Coach for TIS students during the 25-26 school year beginning October 10, 2025, and ending March 7, 2026, in an amount not to exceed \$1100. This is a budgeted expense payable from General Funds or other monies obtained.
- **Yvonne Rodriguez**, stipend for supplemental work as the Track Coach for TIS students during the 25-26 school year, beginning February 16, 2026, through the end of the school year in an amount not to exceed \$1100. This is a budgeted expense payable from General Funds or other monies obtained.

### **Educational Service Center of Lake Erie West Contract Modification**

- Contract modification, which now reflects the recent updates to the law.

### **Annual Narrative on the Use of Student Success and Wellness Funds**

#### Finance Actions

**IT IS ALSO RESOLVED** that The Intergenerational School Board has reviewed and approves the following Financial Action Items:

- **March Financials**
- **Approval of the 2026/2027 School Budget**

#### Educational Actions

**IT IS ALSO RESOLVED** that The Intergenerational School Board has reviewed and approves the following Education Action Items:

- **Enrollment Policy Revision**



**Governance Actions**

**WHEREAS**, as a Public Charter School in the State of Ohio, the Board of Directors must approve the election of all Board Members and Board Officers.

**IT IS THEREFORE RESOLVED** that The Intergenerational School Board has reviewed and approves the following Intergenerational Cleveland Governance Action Items:

- Appointment of Maya Claytor as an At-Large Member of the Board of Directors of Intergenerational Cleveland, effective May 6, 2026



Joanna Lopez-Inman, Secretary





# Intergenerational S C H O O L S

May 6, 2026

## BOARD RESOLUTIONS

At the Regular Meeting of the Board of Directors of Near West Intergenerational School on May 6, 2026, the following resolutions were proposed and approved by the board:

**WHEREAS** the mission of Near West Intergenerational School is to connect, create, and guide a multigenerational community of lifelong learners and spirited citizens as they strive for academic excellence;

**WHEREAS**, as a Public Charter School in the State of Ohio, and in accordance with Board policy, the Board of Directors must review and approve all Minutes, Policies, Personnel Actions that were not named specifically in the prior approved budget, Contract Actions, and Expenses over \$25,000, Out of State travel, and transactions between Intergenerational Schools;

**IT IS THEREFORE RESOLVED** that the Near West Intergenerational School Board has reviewed and approves the following:

### Consent Agenda

#### **Minutes of the Regular Board Meeting**

- ~~March 18, 2026~~

#### **Approval of Policies**

- Artificial Intelligence (AI) Policy

#### **Contract and MOUs**

- **Blake Gilliam** to provide leadership coaching on Equity and Cultural Responsiveness. This contract was previously approved, but has changed scope for the remaining amount. It is a budgeted expense that will not exceed \$1,500 and to be paid out of general funds or other monies obtained.
- **FIT Technologies** for managed IT services and help desk support for a two-year contract term effective July 1, 2026, through June 30, 2028. Budgeted expense not to

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Intergenerational School  
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exceed \$142,133 per year to be split between the two schools (TIS-East = \$71,066.50, NWIS = \$71,066.50) and to be paid from general funds.

## Approval of the Near West Reading Improvement Plan

## Annual Narrative on the Use of Student Success and Wellness Funds

### Finance Actions

**IT IS ALSO RESOLVED** that The Intergenerational School Board has reviewed and approves the following Financial Action Items:

- **March Financials**
- **Approval of the 2026/2027 School Budget**

### Educational Actions

**IT IS ALSO RESOLVED** that Near West Intergenerational School Board has reviewed and approves the following Education Action Items:

- **Enrollment Policy Revision**

### Governance Actions

**WHEREAS**, as a Public Charter School in the State of Ohio, the Board of Directors must approve the election of all Board Members and Board Officers.

**WHEREAS** the following slate of Officers was nominated and vetted by the Governance Advisory Council to serve in this role from July 1, 2026, through June 30, 2028

- Danielle Clark, Chair
- Richaun Bunton, Vice Chair
- Steven Lake, Secretary

**WHEREAS** the Near West Intergenerational School Board has reviewed and approved the following Governance Action Item:

- Resignation of Steven Lake as the Near West School Board Representative to the Intergenerational Cleveland Board effective June 30, 2026.
- Nomination of Brad Norton to serve as the Near West School Board Member and Representative to the Intergenerational Cleveland Board with a term beginning July 1, 2026, through June 30, 2029.



**WHEREAS** the Near West Intergenerational School Board has reviewed and approved the following Intergenerational Cleveland Governance Action Item:

- Appointment of Maya Claytor as an At-Large Member of the Board of Directors of Intergenerational Cleveland, effective May 6, 2026

**IT IS THEREFORE RESOLVED** that the Near West Intergenerational School Board certifies these changes to the Near West School Board.







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Joanna Lopez-Inman, Secretary



Title	NWIS Resolution
File name	00._Near_West_Resolution-Full.pdf
Document ID	f4e1e54e683956b52fbaef2dfe961ffe49e6e223
Audit trail date format	MM / DD / YYYY
Status	● Signed

## Document History

 SENT	<b>05 / 21 / 2026</b> 14:45:52 UTC	Sent for signature to Joanna Lopez-Inman (jlopezinman@igschools.org) from salonso@igschools.org IP: 50.58.108.50
 VIEWED	<b>05 / 21 / 2026</b> 16:14:33 UTC	Viewed by Joanna Lopez-Inman (jlopezinman@igschools.org) IP: 69.54.48.120
 SIGNED	<b>05 / 21 / 2026</b> 16:15:15 UTC	Signed by Joanna Lopez-Inman (jlopezinman@igschools.org) IP: 69.54.48.120
 COMPLETED	<b>05 / 21 / 2026</b> 16:15:15 UTC	The document has been completed.

# Coversheet

## CMSD/ESCLEW Sponsor Report

**Section:** IV. Sponsor Reports  
**Item:** A. CMSD/ESCLEW Sponsor Report  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** May TIS - sponsor update 25\_26.docx



# Educational Service Center of Lake Erie West Community Schools Center

## ESC of Lake Erie West Community Schools Center Sponsor Update

**School Name:** The Intergenerational School

**Month:** May

Presented by:	Joyce Lewis	In person
Governing Authority Highlights / Important updates from ESCLEW	<p>Save the Date: The Annual Statewide Meeting is scheduled for Friday, September 18, 2026. Topics will include compliance updates and opportunities for networking. Additional details and the full agenda will be shared in the coming weeks.</p> <p>Dave Yost has released the <a href="#">2026 edition of Ohio's Sunshine Laws manual</a>, better known as the "Yellow Book." This annual guide is a helpful resource for understanding Public Records and Open Meetings requirements.</p>	
Recent Site Visit Highlights	<p>During the May site visits, the focus will be on reviewing academic performance, intervention systems, and progress toward Performance Framework goals, along with school climate and discipline practices. The visits will also include a review of staffing and retention, end-of-year compliance and reporting, summer learning plans, and student promotion and retention decisions to support readiness for the upcoming school year.</p>	
Financial Update	<p>The ESCLEW Community Schools Financial Consultant held a monthly meeting with the school's treasurer, a completed report was emailed following the meeting. If you have any concerns with your school's financials, please contact your school's treasurer.</p>	
Any questions asked by the Governing Authority for the Sponsor?		
Follow up provided		



# Educational Service Center of Lake Erie West Community Schools Center

<b>School Governance Performance Targets and Metrics</b>					
Measure Domain	Assessment	Exceeds the Standard (6 points)	Meets the Standard (4 points)	Approaches the Standard (2 points)	Falls Below the Standard (0 points)
School Governance	Board Engagement	100% of board members attend two (2) or more school visits or school-sponsored events	100% of board members attend at least one (1) school visit or school-sponsored event	At least one board member attends at least one (1) school visit or school-sponsored event	Zero (0) board members attend a school visit or school-sponsored event
<b>Evidence:</b> Joanna- Fall Fest Richaun- Lynn- Carolyn- Progressive Day Brad- Bob- Site visit with Sponsor Stacey- Fall Fest, Progressive Day Danielle- Literary Day					
School Governance	Required Number of Regular Board Meetings		Six (6) Meetings held per year	Five (5) meetings held per year	Four (4) or fewer meetings held per year
<b>Evidence:</b> August September October December January March					



# Educational Service Center of Lake Erie West Community Schools Center

School Governance	Required Number of Board Members		Five (5) or more sponsor approved board members for all meetings		Fewer than five (5) sponsor approved board members for one (1) or more meetings
<b>Evidence:</b> July-8 August-8 September-8 October-8 November-8 December-8 January-8 March-8					
School Governance	Proper Meeting Notice		Timely public notice for all meetings, reschedules, and cancellations	Timely public notice not provided for one (1) meeting, reschedule, or cancellation	Timely public notice not provided for two (2) or more meetings, reschedules, or cancellations
<b>Evidence:</b> In compliance					
School Governance	Required Board Member Training		Completion of Open Meetings and Public Records for 100% of board members	Completion of Open Meetings and Public Records for 80-99% of board members	Completion of Open Meetings and Public Records for less than 80% of board members
<b>Evidence:</b> Joanna- -completed Danielle- completed Stacey- -completed Richaun-completed Lynn-completed Carolyn-completed Brad-completed					



# Educational Service Center of Lake Erie West Community Schools Center

<b>Bob-</b>					
School Governance	Board Member Attendance	Overall member attendance is $\geq$ 90%	Overall member attendance is between 80-90%	Overall member attendance is between 70-79%	Overall member attendance is $\geq$ 70%
<b>Evidence:</b> August- 6/8 September- 7/8 October- 7/8 December 6/8 (one virtual) January 8/8 (one virtual) March 7/8 (one virtual)					

# Coversheet

## Annual Review & Approval of Policies

**Section:** V. Consent Agenda (Please read Board Resolutions for Personnel Action detail)  
**Item:** B. Annual Review & Approval of Policies  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** Draft Model AI Policy 1.pdf

# The Intergenerational Schools AI Policy

(Based on the AI Model Policy for Ohio Districts and Schools developed by ODEW)

## I. PURPOSE STATEMENT

To support students and educators in the use of artificial intelligence (AI) for educational and operational purposes, the Board of Directors of The Intergenerational Schools have adopted this policy on the use of AI. The purpose of this policy is to prepare students for success, encourage innovation for classroom instruction, and embrace opportunities for operational efficiency, while providing for consistent expectations, standards, and approval processes for safe and responsible implementation and integration of AI. This applies to multiple use cases, applications, and integration of AI, including generative AI.

## II. DEFINITIONS

- **Artificial intelligence (AI):** A machine-based system that can, for a given set of human-defined objectives, make predictions, recommendations, or decisions influencing real or virtual environments. Artificial intelligence systems use machine- and human-based inputs to perceive real and virtual environments; abstract such perceptions into models through analysis in an automated manner; and use model inference to formulate options for information or action.<sup>1</sup>
- **Generative AI:** Any internet-based generative artificial intelligence programs that make use of large language model algorithms to make something new. AI used for auto-complete, minor text predictions, and/or grammar/spelling/punctuation suggestions, commonly found in most word-processing applications, is not considered generative AI.<sup>2</sup>
- **AI tool:** AI applications, algorithms, or systems that make use of AI to generate outputs based on human inputs, with an emphasis on generative AI.<sup>3</sup>

## III. AI LITERACY

The Board recognizes the importance of preparing students and educators for the successful integration of innovative technologies. Accordingly, it is the policy of the Board that **The Intergenerational Schools** responsibly integrate AI by building AI literacy for all students and educators, including integration of AI into relevant curriculum, professional learning opportunities, and safe and responsible usage.

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<sup>1</sup> [15 U.S. Code § 9401, Sec. 3](#)

<sup>2</sup> [O.A.C. 3342-3-01.8\(B\)\(15\)](#)

<sup>3</sup> Ohio School Boards Association (OSBA), Sample Policy EDEC: Artificial Intelligence

#### **IV. STAKEHOLDER ENGAGEMENT**

**An ongoing AI workgroup shall be convened** to inform AI policy and implementation. The workgroup should include educators who are representative of grade levels and departments, including special education and related services professionals, other relevant staff, Board members, and students, as well as external representatives such as local businesses and postsecondary institutions. Educators and staff should be given the opportunity to explore and gain experience with applications and integrated approaches to achieving **the school's** priorities. The workgroup should regularly review new research and guidance and provide ongoing feedback to the **school**.

Parents and community members should be informed through ongoing engagement about the skills students need for the future workforce and how AI is being used in the classroom. Educational resources may be provided to empower families to understand the potential risks associated with the unsupervised use of AI tools. Regular AI updates, including use of tools and opportunities for feedback, shall be integrated into the existing family and community engagement strategy.

#### **V. DATA PRIVACY AND SECURITY**

The **school** is committed to protecting the privacy and security of all student and staff data. The adoption and implementation of any AI tool must adhere to existing data privacy and security policies that include, but are not limited to, Personally Identifiable Information (PII), FERPA, and any other relevant state of Ohio and federal laws. AI tools should only access, store, or process data that is necessary, and must do so in a secure, transparent, and ethical manner. AI systems must be vetted to ensure they meet rigorous standards for data encryption, access control, and responsible data use.

Users must also follow the terms of service, including appropriate age limits.

#### **VI. PROCUREMENT AND EVALUATION OF AI TOOLS**

The adoption of AI-enabled tools should be conducted in accordance with existing procurement policies and in alignment to the **school** core values, goals, and priorities. Selection procedures must ensure that any AI tool must adhere to data privacy and security policies. Evaluation of tools must also address alignment to instructional and operational goals, accessibility, and cost. All third-party vendors providing AI tools must comply with **school** standards, state and federal law for data protection, ethical use, and accessibility.

## VII. ETHICAL USE OF AI

It is the policy of the **school** that the design and implementation of AI be safe, responsible, and keep people at the core of every AI-related decision. AI implementation should be human-centered and should empower students, educators, and communities. It is a tool to support learning and teaching, not a substitute for student effort or the role of the educator. Accordingly, users should critically analyze AI output, respect safeguards and rules, and be transparent about its use.

## VIII. ACCEPTABLE USE

The **school** recognizes that responsible and appropriate uses of AI by students and educators will vary depending on the context, including but not limited to grade level, subject, and/or the nature of the classroom activity or assignment.

Expectations for acceptable student uses should be clearly articulated by educators in alignment with policy and guided by the specific requirements for an assignment or activity. This includes specifying AI use expectations in course syllabi and assignment instructions when relevant. These expectations should clearly articulate the expectations of use, types of relevant assignments where AI use is acceptable, and required format for references.

Educators should consider the impact on learning objectives and assessment of student learning when designing related instruction and classroom activities. No assignment shall require the use of a tool that cannot be provided by the **school**. AI tools approved for use should be clearly communicated.

Expectations for educator, staff, and third-party use should align with **school** priorities. Educator use should be in alignment with the [Licensure Code of Conduct for Ohio's Educators](#). Educators and staff must model appropriate acceptable use practices when using AI tools for instructional and operational uses.

Use of tools that have not been approved is not permitted.

All users are expected to employ AI tools solely for educational and related operational purposes, upholding values of respect and academic integrity, and in alignment with other related **school** policies. Using AI tools for bullying, harassment, and any form of intimidation is strictly prohibited and should be addressed in alignment with existing behavior and discipline policies.

Students and staff with concerns regarding inappropriate use that violates **school** policies and/or applicable state or federal laws should contact the Superintendent or appropriate designated staff member.

## IX. **ACADEMIC INTEGRITY**

The Board recognizes that the responsible use of AI requires the highest standards of academic integrity with clear expectations for students, educators, and staff regarding the ethical use of AI tools.

AI-enabled tools may be used to support student work (such as brainstorming or feedback), but AI-generated work must not replace student work. Students are expected to complete assignments and assessments in a manner that reflects their own understanding and effort, critically analyze AI-generated content and not misrepresent it as original work, and use proper citations and references for AI-assisted work according to existing policies and expectations relevant to assignments (such as APA or MLA style formats).

The **school** should specify procedures for investigating and addressing suspected misuse in alignment with existing academic integrity policies.

## X. **IMPLEMENTATION AND REVIEW**

The **school**, in partnership with the **school's** ongoing AI workgroup, will monitor developments in AI technology and update policies to address emerging risks. This policy should be reviewed often for effectiveness; alignment to district, school, educator and student needs; considerations of ongoing innovation; related data privacy and management policies; and impact on students including learning outcomes.

# Coversheet

## Contracts & MOU's

**Section:** V. Consent Agenda (Please read Board Resolutions for Personnel Action detail)  
**Item:** C. Contracts & MOU's  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** RENEWAL-NPG-TIS.pdf  
RENEWAL-TIS-Ingram-Basketball.pdf  
REVISED-B. Gilliam.pdf  
RENEWAL-IG-FIT Contract- 2026-2028.pdf

# CONSULTING SERVICES AGREEMENT

**I. The Parties.** This Consulting Agreement ("Agreement") is by and between a Pennsylvania limited liability company named NPG Education Consulting, LLC (the "Consultant") and an entity known as Intergenerational School - East with a mailing address of 11327 Shaker Blvd Ste 200E, Cleveland, OH 44104 (the "Client").

**II. Services.** Consultant agrees to provide the following services ("Services"):

- Coaching Sessions and/or Instructional Coach Training with Aziz Ahmad, the instructional coach, or representative(s) (Total length: 23 hours)
  - July 2026 - April 2027
  - Focus: Strengthen Tier I instruction
  - Levers: Strategic plan creation and execution, instructional coaching framework implementation, schoolwide priority teacher actions, alignment of instructional systems, meaningful and relevant teacher professional development opportunities

All of the above Services shall be performed and delivered virtually, and Consultant shall host all meetings.

**III. Term.** The Term of this Agreement is from the date the parties fully execute this Agreement to the date of April 30, 2027. Services shall commence on July 1, 2026, provided the parties fully execute this Agreement no later than June 30, 2026.

**IV. Client Cooperation.** Client recognizes and acknowledges that the quality and accuracy of the Services, and the efficiency and timeliness of their completion, significantly depends on Client's cooperation with Consultant as well as Client's available resources. Therefore, upon the reasonable request of Consultant, Client shall provide Consultant in a reasonably timely manner such information and resources in Client's possession or that may be reasonably obtainable by Client that are necessary for Consultant to completely and effectively perform the Services. Consultant shall be entitled to rely on the timeliness, completeness, correctness and accuracy of the information provided by Client to Consultant in the performance by Consultant of the Services.

**V. Payment.** In consideration for the Services provided, Consultant shall be paid the following amount via mailed check unless a different payment vehicle is mutually agreed upon in writing by the parties: \$15,000 (Fifteen thousand U.S. Dollars).

**VI. Payment Interval.** Consultant shall be paid, in accordance with Section V, in the following manner:

- \$7,500 (50%) due by August 7, 2026
- \$7,500 (50%) due by April 2, 2027.

**VII. Personal Performance of Services.** It is understood and agreed Nicole Padula George shall personally perform all Services undertaken by Consultant under this Agreement and such Services shall not be delegable or assignable to others without the written consent of Client. In the event Nicole Padula George is unable to personally perform said Services or any portion thereof for reasons beyond her control (such as but not limited to personal illness, personal or family emergency, power outage, force majeure) as determined solely by Consultant, Consultant shall inform Client via email or by other means practical at the time. Such failure to perform Services shall not constitute a breach of this Agreement. In such event, the parties shall attempt to reschedule. If rescheduling is not practical, Consultant may offer Client a credit for future services

## Consulting Services Agreement – NPG and Intergenerational School - East

in proportion to the particular service not rendered as determined solely by Consultant. If such credit is unacceptable and the parties are unable to come to another mutually agreeable arrangement, Consultant shall refund Client said proportionate payment. Notwithstanding the foregoing, in any event Client shall have no legal right, claim or action whatsoever against Consultant, its employees, consultants, agents or representatives as a result of or in relation to such failure to perform services or remedy thereof.

**VIII. Expenses.** Consultant shall be responsible for all expenses related to its work in providing the Services under this Agreement. This includes, but is not limited to, Consultant's supplies, equipment, operating costs, business costs, employment costs, taxes, Social Security contributions and/or payments, disability insurance, unemployment taxes, and any other cost that is reasonable and necessary for Consultant to perform said Services. Notwithstanding the foregoing, Consultant reserves the right to charge back to Client any out-of-pocket expenses that are not ordinary or reasonable in connection with the performance of said Services.

**IX. Termination Clause.** Either party may terminate this Agreement for any reason at any time with at least five (5) Calendar Day(s) Written Notice to the other party. Email from the authorized representative of the notifying party to the authorized representative of the other party with the subject heading "Notice of Contract Termination" shall suffice as such Written Notice. Client acknowledges and agrees that in the event Client terminates this Agreement for any reason, with or without cause, any and all payments for Services issued to Consultant belong to and shall remain with Consultant and shall not be voided by Client nor refunded by Consultant.

**X. Return of Records.** If Client desires the return of any records and data that were provided to Consultant by Client for the performance of Services and that are of the Client's property not within the public domain, within thirty (30) calendar days of the termination or expiration of this Agreement, Client shall request in writing to Consultant the return of any and all such records and data. Such request shall identify and specify the particular record(s) or data of the Client property the return of which is being requested, so that Consultant may properly comply with said request.

**XI. Dispute Settlement.** The parties agree to make a good faith effort to resolve any dispute, controversy or claim arising from or relating to this Agreement through mediation prior to commencing litigation. Within sixty (60) days following a written request by either party to mediate a dispute, controversy or claim that has not been resolved by informal negotiation, the parties shall mutually agree upon a mediator, schedule a mediation, and shall share the costs of mediation equally, except costs incurred by each party for representation by legal counsel and travel. The jurisdiction for dispute resolution – whether by mediation, litigation or otherwise – shall be administered and decided by Consultant.

**XII. Liability of Consultant.** The parties acknowledge and agree that Consultant's Services provided under this Agreement are consulting only, and any and all decisions and decision-making, including but not limited to whether or not to follow any advice of Consultant, is solely the responsibility of Client. Accordingly, Consultant shall have no liability whatsoever with respect to the decisions made or the actions taken by Client in reliance upon the advice or recommendations of Consultant or as a result of any of the Services provided by Consultant under this Agreement. Moreover, the parties acknowledge and agree that the effectiveness of the Services and the success of any actions undertaken by Consultant in connection therewith are not guaranteed or warranted by Consultant in any respect whatsoever.

Furthermore, Client acknowledges and agrees that Consultant and its employees, consultants, agents and representatives shall incur no liability to Client or any other party on account of this Agreement, on account of any acts or omissions arising out of or related to the actions of Consultant

Consulting Services Agreement – NPG and Intergenerational School - East

or its employees, consultants, agents and representatives under this Agreement, or on account of the performance or failure to perform any Services to be provided by Consultant under this Agreement, except that Consultant shall remain liable for the intentional or willful misconduct of Consultant.

This section shall survive the termination of this Agreement.

**XIII. Independent Contractor Status.** Consultant, under the code of the Internal Revenue (IRS), is an independent contractor and no employee, consultant, agent or representative of Consultant shall be considered an employee of Client. Consultant acknowledges that it is not the legal representative or agent of Client, nor does it have the power to obligate Client, for any purpose other than specifically provided in this Agreement. In its capacity as an independent contractor, Consultant agrees and represents:

- a.) Consultant has the right to perform Services for others during the term of this Agreement;
- b.) Consultant has the sole right to control and direct the means, manner, and method by which the Services required under this Agreement will be performed; Consultant shall select the routes taken, starting and ending times, days of work, and order the work that performed; and
- c.) Consultant shall not be required by Client to devote full-time to the performance of the Services required by this Agreement.

**XIV. Payment of Taxes.** Under this Agreement, Client shall not be responsible for:

- a.) Withholding FICA, Medicare, Social Security, or any other Federal or State withholding taxes from Consultant's payments;
- b.) Making Federal and/or State unemployment compensation contributions on Consultant's behalf; and
- c.) Making payments of taxes incurred while performing the Services under this Agreement, including all applicable income taxes and all applicable self-employment taxes.

**XV. Indemnification of Consultant.** Client shall indemnify, defend and hold Consultant, and/or its employees, consultants, agents and/or representatives harmless from and against any and all third party claims, liability, suits, losses, damages and judgments, joint or several, and shall pay all costs and expenses (including attorney fees and expenses) as they are incurred in connection with the investigation of, preparation for or defense of any pending or threatened claim or any action or proceeding arising there from, that Consultant and/or its employees, consultants, agents and/or representatives incurs as a result of or in relation to this Agreement or having performed services to Client.

**XVI. Confidentiality & Proprietary Information.** Consultant acknowledges that it will be necessary for Client to disclose certain confidential and proprietary information to Consultant in order for Consultant to perform its duties under this Agreement. Consultant acknowledges that disclosure to a third (3rd) party or misuse of this proprietary or confidential information would irreparably harm Client. Accordingly, Consultant will not disclose or use, either during or after the term of this Agreement, any proprietary or confidential information of Client without Client's prior written permission except to the extent necessary to perform the Services on Client's behalf, unless otherwise required by law.

Proprietary or Confidential information is:

- a) The written, printed, graphic, or electronically recorded materials furnished by Client for Consultant to use that is not within the public domain; and
- b) Any written or tangible information stamped by Client "confidential" or "proprietary," or with a similar legend.

## Consulting Services Agreement – NPG and Intergenerational School - East

Client acknowledges and agrees that the Services rendered to Client are provided solely for Client's use. Accordingly, Client and/or its employees, representatives and agents will not disclose, provide or sell Consultant's work product, either during or after the term of this Agreement, to any third party, except with the express written permission of Consultant, unless otherwise required by law.

Both parties agree that either during or after the term of this Agreement, unless otherwise required by law, neither party shall:

- a) issue any public statements or press release concerning this Agreement or the parties' relationship without the other party's prior written approval; or
- b) use the other parties' and/or its employees, consultants, agents and/or representatives name and and/or likeness in social media, advertising, or other materials, or on any platform, for any purpose unless legally required, without the express written permission of the other party.

**XVII. Governing Law.** This Agreement and all matters arising out of or relating to this Agreement, and all claims, causes of action, controversies, or matters in dispute between the parties to this agreement – whether sounding in contract, tort, statute, regulation or otherwise, and including but not limited to those arising out of or relating to this Agreement – shall be governed by, construed, interpreted, and enforced in accordance with the substantive and procedural laws of the Commonwealth of Pennsylvania, including its statutes of limitations, without giving effect to any choice of law or conflict of laws rules or provisions, whether of the Commonwealth of Pennsylvania or any other jurisdiction, that would cause the application of the laws of any jurisdiction other than the Commonwealth of Pennsylvania.

**XVIII. Severability.** If any provision in this Agreement shall be found or be held to be invalid or unenforceable in any jurisdiction in which this Agreement is being performed, then the meaning of said provision shall be construed, to the extent feasible, so as to render the provision enforceable, and if no feasible interpretation would save such provision, it shall be severed from the remainder of this Agreement which shall remain in full force and effect. In such event, the parties shall negotiate, in good faith, a substitute, valid and enforceable provision which most nearly effects the parties' intent in entering into this Agreement.

**XIX. Entire Agreement.** This Agreement, along with any attachments or addendums, represents the entire agreement between the parties. Therefore, this Agreement supersedes any prior agreements, promises, conditions, or understandings between Client and Consultant.

**XX. Amendments.** This Agreement may be modified or amended if the amendment is made in writing and is signed by both parties.

**XXI. Email.** For purposes of this Agreement, communications by the parties via email are considered to be in writing.

**XXII. Duly Authorized Signatures.** Consultant and Client each warrant that their representative whose signature appears on the signature block of this Contract is duly authorized by all necessary and appropriate Client or Consultant actions to execute this Agreement.

**[Signatures to follow below or on next page]**

Consulting Services Agreement – NPG and Intergenerational School - East

CONSULTANT:

NPG Education Consulting, LLC

By: \_\_\_\_\_ Date: \_\_\_\_\_  
Nicole Padula George, Principal

Email Address: nicole@npgeducationconsulting.com

CLIENT:

Intergenerational School - East

By: \_\_\_\_\_ Date: \_\_\_\_\_  
Brooke King  
(Legally Authorized Representative)

Title: CEO & Executive Director

Email Address: bking@igschools.org

**The Intergenerational School  
A COMMUNITY OF LIFELONG LEARNERS**

---

**Independent Contractor Agreement**

THIS AGREEMENT entered into this date, October 20, 2025, by and between The Intergenerational School (TIS), hereinafter called TIS, and Earl Ingram, hereinafter called “the Coach.”

**WITNESSETH**

WHEREAS, TIS requires the service of an independent, qualified Basketball Coach to manage its basketball program, and,

WHEREAS, Earl Ingram is deemed qualified to perform in this capacity and is interested in doing so.

**NOW, THEREFORE, THE PARTIES AGREE TO AS FOLLOWS:**

---

**I. TERM**

TIS shall engage the Coach in the capacity set forth from 10/20/2025 until either party wishes to terminate this Independent Contractor agreement at any time with 10 business days' notice.

---

**II. PAYMENT**

The Coach shall receive a lump sum payment of \$1,100 for the duration of the contract. Payment will be dispersed upon the completion of the basketball season or as mutually agreed upon by both parties.

---

**III. RESPONSIBILITY OF PARTIES**

The parties herein intend that an independent contractor relationship will be created by this contract. TIS is interested in the conduct, control, and completion of the work as set forth in Section IV, which will lie solely with the Coach.

---

**IV. THE COACH’S RESPONSIBILITY**

### **Job's Primary Duties and Responsibilities:**

- Plan, organize, and conduct basketball practices and training sessions.
- Develop players' skills, techniques, and game strategies.
- Supervise and manage the team during games, tournaments, and practices.
- Ensure the physical and emotional safety of student-athletes during activities.
- Foster teamwork, sportsmanship, and a positive environment.
- Communicate effectively with parents, teachers, and staff regarding schedules, player development, and any concerns.
- Uphold school policies, safety protocols, and ensure compliance with relevant athletic regulations.

This engagement is contingent upon the Coach obtaining and providing to TIS the results of a satisfactory current BCI/FBI background check, a coaching permit, and any other licensure or materials requested by TIS. Any expenses related to the foregoing shall be at the sole cost and expense of the Coach.

---

### **V. TIS'S RESPONSIBILITY**

- Provide access to the gymnasium and required basketball equipment.
  - Support the Coach in enforcing school policies and safety measures.
  - Ensure clear communication about schedules, school policies, and resources.
- 

### **VI. INDEPENDENT CONTRACTOR STATUS**

The status of the Coach shall be that of an independent contractor, and the Coach shall not be considered an employee of TIS and shall not be entitled to receive any fringe benefits associated with regular employment. The Coach shall be responsible for payment of all federal, state, and local taxes associated with compensation received pursuant to this Agreement. TIS in no way controls, directs, or has any direct responsibility for the actions of the Coach herein.

---

### **VII. NON-DISCRIMINATION**

The parties to this Agreement shall not discriminate against any individual in any way due to race, color, religion, sexual orientation, age, gender, handicap, or national origin. The parties agree to be bound by applicable state and federal rules governing Equal Employment Opportunity and Non-Discrimination.

---

## VIII. AMERICANS WITH DISABILITIES ACT

The Coach shall comply with all applicable provisions of the Americans with Disabilities Act (Public Law 101-336, 42 USC 12101-12213) and all applicable Federal Regulations under the Act, including 28 CFR Parts 35 & 36.

---

## IX. INDEMNIFICATION

The Coach shall indemnify, defend, and hold harmless TIS, its officers, departments, divisions, employees, and agents from and against any and all suits, actions, legal or administrative proceedings, claims, demands, or damages of any kind or nature arising out of this Agreement, which are attributed to any act or omission of the Coach, their agents, employees, or anyone acting under the Coach's direction, control, or on the Coach's behalf in connection with or incident to this Agreement.

---

## X. ENTIRE AGREEMENT

This Agreement contains the entire contract between the parties, and it may not be modified, amended, altered, or extended except through a written amendment signed by all parties.

---

**IN WITNESS HEREOF**, the parties hereto have caused this Agreement to be executed as of the date first appearing above.

**Contractor Signature:**

Earl Ingram, Basketball Coach



---

Date: 03 / 20 / 2026

**APPROVED BY TIS:**

Brooke King, Executive Director



---

Date: 10-20-25

**TIS**

11327 Shaker Boulevard, Suite 200 E  
Cleveland, Ohio 44104






P 216.721.0120

F 216.721.0126

[www.TISonline.org](http://www.TISonline.org)

Title	E. Ingram - 25-26 TIS Basketball Coaching Agreement
File name	25-26_Basketball_Contract.docx
Document ID	0d3a8c627094cfc006e41cf34e0ee8b230535593
Audit trail date format	MM / DD / YYYY
Status	● Signed

## Document History

 SENT	<b>03 / 19 / 2026</b> 19:42:17 UTC	Sent for signature to Brooke King (bking@igschools.org) and Earl Ingram (mrwinston24@hotmail.com) from adavidsonbey@igschools.org IP: 50.58.108.42
 VIEWED	<b>03 / 20 / 2026</b> 14:09:56 UTC	Viewed by Brooke King (bking@igschools.org) IP: 135.232.20.86
 SENT	<b>03 / 20 / 2026</b> 14:53:46 UTC	A new document has been created based off of an existing document with ID 0d3a8c627094cfc006e41cf34e0ee8b230535593 IP: 50.58.108.42
 EDITED	<b>03 / 20 / 2026</b> 14:53:46 UTC	Edited by Aaron Davidson-Bey (adavidsonbey@igschools.org) IP: 50.58.108.42
 RESENT	<b>03 / 20 / 2026</b> 14:53:46 UTC	Signature request resent by Aaron Davidson-Bey (adavidsonbey@igschools.org) IP: 50.58.108.42

<b>Title</b>	E. Ingram - 25-26 TIS Basketball Coaching Agreement
<b>File name</b>	25-26_Basketball_Contract.docx
<b>Document ID</b>	0d3a8c627094cfc006e41cf34e0ee8b230535593
<b>Audit trail date format</b>	MM / DD / YYYY
<b>Status</b>	● Signed

### Document History



**03 / 20 / 2026**  
14:58:33 UTC

Signed by Brooke King (bking@igschools.org)  
IP: 50.58.108.50



**03 / 20 / 2026**  
17:03:37 UTC

Viewed by Earl Ingram (mrwinston24@hotmail.com)  
IP: 96.29.195.47



**03 / 20 / 2026**  
17:08:13 UTC

Signed by Earl Ingram (mrwinston24@hotmail.com)  
IP: 96.29.195.47



**03 / 20 / 2026**  
17:08:13 UTC

The document has been completed.

## Revised Proposal

### Spring 2026 Principal Equity Leadership Coaching Options

**Prepared for:** The Intergenerational Schools

**Network Leader:** Brooke King

**Facilitator:** Blake Gilliam

---

#### Purpose of This Proposal

This revised proposal outlines three professional development options that can be delivered during the remainder of the **2025–2026 school year** within the available **\$1,500 budget**. All options are designed as **1:1 coaching engagements with the Principal** and align directly to **OPES Standard 6: Equity and Cultural Responsiveness**.

The proposal also includes **one recommended contract extension option** for the **2026–2027 school year**.

---

#### SPRING 2026 OPTIONS (Budget: \$1,500)

*All options below are designed for 1:1 coaching with the Principal.*

---

## **Option 1 — Equity Leadership Intensive (3-Session Coaching Series)**

**Total Cost: \$1,500**

A focused, high-impact coaching arc that strengthens the Principal's equity-centered leadership aligned to OPES Standard 6.

### **Session Breakdown**

#### **Session 1 — Identity & Leadership**

- Leadership Identity Map
- Reflection on identity and decision-making
- OPES 6.1: Cultural knowledge & sensitivity

#### **Session 2 — Bias, Interpretation & School Culture**

- Assumption Tracker
- Real leadership scenarios
- OPES 6.2–6.4: Norms, inclusiveness, addressing inequitable behaviors

#### **Session 3 — Equity Systems Review & Action Plan**

- Mini audit of discipline, grading, or access
- 30-day leadership plan
- OPES 6.3: Cultivating an equitable school culture

### **Deliverables**

- Leadership Identity Map
  - Bias Inventory
  - Mini equity audit
  - 30-day Equity Leadership Plan
-

## **Option 2 — Spring Equity Leadership Audit + Coaching Debrief**

**Total Cost: \$1,500**

A data-driven, systems-focused engagement that provides the Principal with actionable insights and next steps.

### **Components**

- Review of discipline, attendance, grading, or access data
- Identification of equity gaps
- Written summary of findings
- 90-minute leadership debrief
- Follow-up coaching session

### **OPES Alignment**

- **6.3:** Cultivates and monitors a culture of equity
- **6.4:** Addresses inequitable behaviors and outcomes

### **Deliverables**

- Equity Systems Snapshot
  - Recommendations Report
  - Leadership Debrief Summary
-



**Created by:**  
Victoria Bonca  
FIT Technologies

**Prepared for:**  
Brooke King  
Intergenerational Schools

# Managed IT Services



# Cybersecurity Agreement

[Document.SentDate]

216.583.5000 | FITtechnologies.com  
1375 Euclid Avenue | Suite 500  
Cleveland, OH 44115

# Company Overview

Founded in 1999 by Micki Tubbs and Michelle Tomallo, FIT is now a privately held, 100% employee-owned company headquartered in Cleveland, OH. We pride ourselves on our culture of creativity and high performance that has resulted in continued growth over the last decade. We lead our teams with a foundation of core values alignment and pride ourselves on finding pathways for our employees to continue to grow.

We have a fundamental belief in technology to drive business and we differentiate ourselves by outlining how to leverage technology to enable your business outcomes. By applying best practices and staff expertise, we provide practical solutions that allow your systems to run better.

We believe in the power of authentic partnerships where people feel trusted, supported, and valued – allowing our team, our clients, and our providers to thrive. Our experiences have shown that the most successful and long-term partnerships involve active, mutual participation throughout each stage of our IT journey together. As such, we seek successful and long-term partnerships with our clients by building a strong relationship, underscored by our technical breadth, professional credibility, and experienced staff.



As a testament to our company's success, our company has been recognized with the following awards in recent years:

- 11-time recipient of NorthCoast 99 award for top talent in the region
- Named to 5 consecutive MSP501 lists, ranking the world's best Managed Service Providers
- 5-time recipient of the Weatherhead 100 award of fastest growing companies
- Ernst & Young Entrepreneur of the Year Award for Technology



Additionally, we proudly utilize the following certifications and models to best serve our client partners:

- SOC 2
- ITIL Specialist
- EOS



# The FIT Proven Process



# Agreement Overview

FIT is pleased to provide Intergenerational Schools with a Managed IT Services + Cybersecurity Agreement (FIT MSA). The following areas of technical services and support are included in this Agreement:



## Help Desk + Field Support Services | Level 1

- Support and maintain company-owned workstations and operating systems
- Set up new user workstations
- Verify user access and permissions to computers and systems
- Assist with cybersecurity remediation and endpoint management
- Install and troubleshoot local and network printers
- Assist with company-owned workstation asset management
- Manage service tickets and requests via email, phone, chat, and client portal
- Respond to infrastructure outage alerts



## Infrastructure Support Services | Levels 2 + 3

### *Server and Storage Systems (Cloud and On Premise)*

- Perform monitoring, diagnostics, and repair
- Resolve performance and capacity issues
- Create and manage user accounts and permissions
- Maintain system and security integrity
- Administer agreed upon backup plans
- Perform system administration

### *Network Systems: Switches, Wireless, Routers, Security, Filtering, Firewall*

- Perform monitoring, advanced diagnostics, and repair
- Perform basic configuration changes
- Perform firmware upgrades
- Maintain network security and integrity
- Administer VPN configuration
- Implement performance tuning as needed
- Perform system administration
- Manage content filtering/firewall rules

### *Communications: Voice, Chat, and Conferencing*

- Manage user accounts
- Troubleshoot issues with communications providers
- Perform call forwarding changes
- Perform maintenance and firmware upgrades

The following cybersecurity tools and services are included in this Agreement.



## Cybersecurity + Productivity Tools

### *Identity, Access, + Endpoint Management*

- Microsoft Single Sign on (SSO)
- Microsoft Self-Service Password Reset
- Microsoft Multifactor Authentication (MFA / 2FA) to Conditional Access
- Microsoft Entra ID
- Microsoft Mobile Device Management (MDM) / Mobile Application Management (MAM)
- Microsoft Autopilot
- Cloud email signature
- Password Management Vault
- Third party patching
- Identity Verification

### *Threat Protection*

- Microsoft Defender for Endpoint (detection + response)
- Microsoft Defender for Identity
- Microsoft Defender for Office 365 (email)
- Dark web monitoring
- Security Awareness Training Platform (SAT)

### *Data Protection + Cloud Security*

- Microsoft 365 User Account Cloud Backups
- Microsoft email encryption
- Microsoft Data Loss Prevention (DLP)
- Microsoft Cloud App Security + Country Access
- Microsoft Hard Drive Encryption
- Cloud Print Server Hosting



## Cybersecurity Managed Services

- Security alerts, incident monitoring and response during normal business hours
- Intrusion detection and prevention (IDS/IPS) system review
- Microsoft Secure Score reporting and review
- Cyber insurance attestation review and assistance
- Phishing simulations





## Services + Support Assumptions

- FIT Technologies will provide remote support and dispatch onsite support on an as-needed basis
- Intergenerational Schools is responsible for the purchase of all software and renewal of licenses.
- Labor activities included in this MSA are for break/fix, maintenance, and support as outlined in this FIT MSA.
- Contracting for future other services offered by FIT Technologies will be provided under a separate agreement.
- Installations and configuration of new hardware/software or other consultative services that exceed four hours will be evaluated, and if it is determined to be outside of the MSA, FIT will present a quote for approval as a separate billable project.
- FIT will support existing client backups. Licensing and management of existing backups may be transferred to FIT if all parties agree. If a new backup platform or licensing is necessary, they will be procured outside of this Agreement.
- This Service Contract includes Cybersecurity and Productivity Tools supplied by FIT for active users. Details and relevant assumptions pertaining to the included cybersecurity and productivity tools are specified in Appendix D.
- FIT will provide an asset management system for company-owned workstations utilizing FIT's Remote Monitoring and Management (RMM) tool as the source of record. If the client requests that FIT uses their existing asset system, FIT may need to build integrations with their RMM.
  - For asset management purposes, company-owned workstation equipment includes:
    - Laptops, desktops, and tablets
- FIT will not support the client's existing AV system if FIT did not install the AV system.
- FIT will not provide voice recordings for auto attendants or any similar requests for audio recordings.
- All call flow changes go through a Change Advisory Board (CAB) and will be a separate billable project.
- In order to maintain network security and integrity, FIT requires active security licensing and warranty with the network vendor.
- Basic configuration changes in Infrastructure Support Services Levels 2 + 3 includes network adjustments such as: modifying firewall rules (e.g., opening a port), updating Domain Name System (DNS) settings, or changing Virtual Local Area Network (VLAN) assignments.



## Start Date + Term of Service

The start date for the Managed Services Agreement + Cybersecurity will be begin on July 1, 2026 and will continue for 24 consecutive months.



## FIT Guarantee

If FIT or Intergenerational Schools believes our values and commitment to an authentic partnership are not aligned, together we will come to an agreement on the transition of the relationship to a new technology partner. Refer to the Standard Terms & Conditions link below for more information.

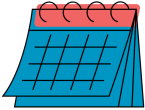
## Invoicing + Payment Terms

FIT will invoice Intergenerational Schools each month for the contracted number of users plus any approved labor, materials, or equipment costs incurred outside the scope of the contract during the month. Intergenerational Schools will be billed for credit card processing fees if incurred. Payment is due within 30 days of receipt of the invoice. Late payments are subject to a 1.5% service charge per month as outlined in the Terms & Conditions.



## Renewal

Within 60 days of the expiration of the term, FIT Technologies will issue a renewal contract. At that time, both parties will work to establish the terms of a renewal or the termination of services. If agreement is not renewed by end of term, FIT will continue month to month at current FIT MSA rates.



## Standard Terms + Conditions

This Agreement is subject to the Standard Terms and Conditions found at <https://www.fittechnologies.com/fit-standard-terms-and-conditions/> which are hereby incorporated by reference. To the extent there is any conflict between the terms of this Agreement and the Standard Terms and Conditions, the terms of this Agreement shall govern.





## Acceptance

***The terms included in this Managed IT Services Agreement + Cybersecurity are approved.***

If the organization is tax exempt, a copy of the tax exemption certificate must accompany this signed agreement.

Is the organization tax exempt?

**Intergenerational Schools**  
**Brooke King**  
**Executive Director**

**FIT Technologies**  
**Adam Tubbs**  
**CEO**



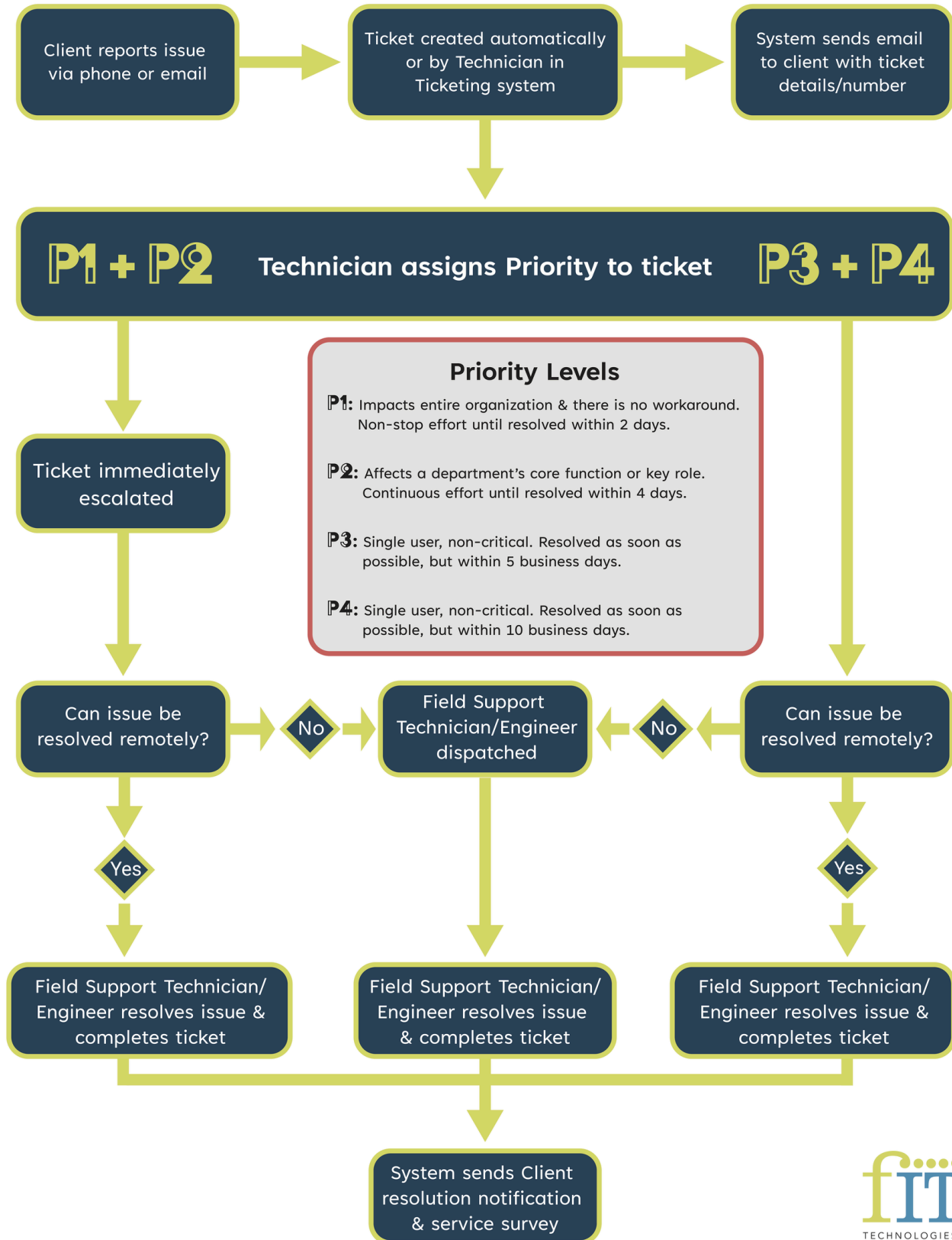
## Appendix A | Support Service Level Agreement

	<b>P1</b>	<b>P2</b>	<b>P3*</b>	<b>P4</b>
<b>Impact</b>	Impacts the entire organization and there is no workaround	Affects a department's core function or key role	Single user/non-critical	Single user/non-critical
<b>Response</b>	Acknowledged within 15 minutes	Acknowledged within 1 hour	Acknowledged within 1 business day	Acknowledged within 1 business day
<b>Resolution</b>	Non-stop effort until resolved within 2 days	Continuous efforts until resolved within 4 days	As soon as possible, but within 5 business days	As soon as possible, but within 10 business days
<b>Example</b>	Internet or phone outages, multiple systems down.  <b>Follow up with a call to our Helpdesk.</b>	Faxing down, entire building printing down, outages to content filtering	Issues with computers or tablets, software on a single PC, non-board meeting conference room  <i>*This is the default priority level.</i>	Issues with a non-critical device

## Appendix B | Support Access + Process

- FIT's support solutions for the areas listed above include a Service Level Agreement (SLA) based on the priority level of the issue.
- Intergenerational Schools will be assigned a Help Desk support telephone number and email address to report issues or to schedule service. Additionally, Intergenerational Schools will have access to the Autotask Client Portal to submit service requests, find ticket status information, utilize Live Chat support, and schedule appointments with a technician.
- Support requests will be assigned a ticket number and addressed based on the priority level assigned by the engineer. Monitoring alerts received by the FIT team will be handled in the same manner. If a temporary solution is available for the identified problem, the priority may decrease by one level.
- FIT may serve as a single point of escalation for designated equipment and services including those which may be under contract with a separate service provider.
- FIT will monitor issues and provide updates to the designated client contact until the problem is resolved. The Resolution Process is detailed in Appendix C.
- FIT will install an agent on end user company-owned workstations to assist with monitoring and remote troubleshooting.
- For issues that cannot be resolved remotely, FIT may dispatch a technician onsite to resolve the issue, based on priority and SLA.

# Appendix C | Issue Resolution Process



## Appendix D: Cybersecurity + Productivity Tools Assumptions

- In order to provide Cybersecurity support outlined in this Agreement, FIT requires the following minimum Microsoft licensing based on Microsoft's current offerings.
  - **Standard Users** – Microsoft 365 A5
- FIT provides cybersecurity protections solely for accounts and devices properly enrolled in the security services specified in this agreement. If any accounts or devices are excluded by client choice, FIT will not be responsible for incidents, breaches, or damages related to those exclusions.
- FIT provides subscription licensing for cybersecurity software as specified in the FIT MSA and its appendices, covering active staff listed on the FIT MSA invoice. Additional licenses for cybersecurity software can be obtained through FIT for an extra monthly fee.
- Additional licensing and labor efforts may be needed to meet certain compliance standards.
- Microsoft 365 cloud backups
  - Services included in the provided Microsoft 365 cloud backups are as follows:
    - Exchange Online
    - SharePoint Online
    - OneDrive for Business
    - Teams (no personal chat)
  - Offboarded user accounts and associated data will be retained within the backup platform for 90 days after their licenses have been removed
  - After the 90-day period, all data and accounts will be permanently deleted and will no longer be recoverable within the backup platform
- Multifactor Authentication (MFA/2FA)
  - The licensing only supports Microsoft user accounts, MFA/2FA for services such as servers could be subject to additional project costs
  - A Personalized or hands-on staff approach is subject to additional project costs
- Mobile Device Management (MDM) / Mobile Application Management (MAM)
  - Included in this Agreement is the availability to hold up to (1) staff roundtable Q&A about the device management tool.
  - Personalized or hands-on implementations and/or HR handbook policy write ups could be subject to additional project costs
  - The proposed Microsoft Licensing includes Microsoft Intune for MDM and/or MAM security. FIT recommends clients protect company data on mobile devices, and as part of this Agreement, FIT includes a baseline MAM policy to ensure devices that access company data via Microsoft are protected with our standard layer of security. If additional MDM and/or MAM policies are requested, they will be proposed under a separate scope of work.
- Single Sign On (SSO) Implementation
  - Applications must be compatible with Azure Active Directory (AAD)
  - Up to (5) applications are included in this Proposal. Additional applications can be added but may be subject to an additional cost.
- Microsoft Teams VoIP Phone System
  - Domestic and International Calling plan licenses must be purchased separately
  - The one-time project costs for implementation of Microsoft Teams voice, including porting numbers from one carrier to Teams VoIP, is not included in this Proposal
- Microsoft Data Loss Prevention (DLP)
  - The proposed Microsoft Licensing includes Microsoft DLP, which is a highly customizable tool to protect sensitive data within your Microsoft environment. As part of this Agreement, will enable our standard DLP package to run in audit mode to present findings to the client's leadership so they understand what data would be protected through this software. If the client chooses to enable our standard DLP

package, there will be no additional charge. If client chooses to make customizations or request additional DLP requirements, these efforts will be proposed under a separate scope of work.

- Microsoft Autopilot
  - The proposed Microsoft Licensing includes Microsoft Autopilot which can be used to deploy end user computers more quickly. Standard builds and application deployments for Microsoft Autopilot are not included as part of this Agreement, but FIT may build Microsoft Autopilot packages for the client as a means of efficiency throughout the partnership.
- Password Management Vault
  - FIT will provide (1) password management account per active user. Any additional accounts will be billed directly to Intergenerational Schools on the monthly licensing invoice.
  - The implementation of this tool only includes the setup for individual users. The building of permission groups or shared access folders is not included.
  - Should the setup of group or shared permissions be desired, an admin from your organization must be named for setup on ongoing configuration and use of this tool.
- Cloud Email Signature
  - After initial setup, an application wide editor role function can be designated to a member of your organization.
  - FIT will provide (1) email signature template as part of this agreement.
  - The client will oversee the customization, branding, and implementation of their signature design within the Email Signature Platform, following FIT's delivery of the initial template.
  - FIT's involvement will conclude after the initial template is provided; any further development, customization, or troubleshooting of the signature design or branding within the platform will be managed by the client.
  - FIT's scope includes managing user group assignments and Active Directory attribute updates within the Email Signature Platform; other platform settings will remain under client administration.
- Security Awareness Training Platform (SAT)
  - FIT will meet with client to review the initial setup of the security awareness training software and schedule.
  - FIT will setup automated reporting to be sent to client point of contact(s) with training and testing results.

# Coversheet

## TIS-ONLY Sponsor Modification

**Section:** V. Consent Agenda (Please read Board Resolutions for Personnel Action detail)  
**Item:** E. TIS-ONLY Sponsor Modification  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** Spring\_2026\_Modification\_Summary.pdf  
The\_Intergenerational\_School\_Mod\_2.pdf



# Educational Service Center of Lake Erie West Community Schools Center

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## Spring 2026 Community School Modification Updates

Below, please find a description and explanation of the major updates to your community school contract in this contract modification. Your school's modification may also include school-specific changes. If you have any questions about these changes or your school-specific updates, please contact Kurt Aey or Julie Kadri.

**Section 1.4 – Registered Names.** For purposes of ensuring that the Sponsor has complete records, the Sponsor requires that a copy of the Certificate of any name registered with the Ohio Secretary of State for use by the school be included in Attachment 1.4.

**Section 2.1 – Reporting Arrest or Convictions.** Recent events involving public officials make it important that the Sponsor be timely apprised of known arrests or convictions of disqualifying offenses.

**Section 3.2 – Management of Community School.** This language was added to reflect the statutory language.

**Section 4.1 – Compliance with Ohio Laws.** We updated this section to include statutory changes to the language of R.C. 3314.03 required by legislation passed by the General Assembly. R.C. 3314.03 states a number of laws that community schools are required to follow.

**Section 6.6 – Tuition for Out of State Students.** Recent legislation eliminated the citation to R.C. 3314.08(F). The language in this section was updated to remove this statutory citation.

**Section 6.12 – Admissions.** We updated this section to ensure that the statutory nondiscrimination language was accurately reflected.

**Section 8.1 – Prohibition on Employment.** We updated this section to ensure that the statutory citation of R.C. 3314.104 was identified for purposes of the Sponsor Performance Review.

**Section 11.7 – Renewal.** We inserted language to clarify that a renewed school may still be subject to probation, suspension and termination. This language was added to reflect the requirements of the Sponsor Performance Review.

**MODIFICATION NO. 2**  
**TO OHIO COMMUNITY SCHOOL CONTRACT**  
**BY and BETWEEN**  
**Educational Service Center of Lake Erie West (“Sponsor” or “ESCLEW”)**  
**AND**  
**The Intergenerational School (“Governing Authority” or “School”)**

**WHEREAS**, the ESCLEW and the Governing Authority entered into an amended and restated Community School Contract (“Contract”) effective on July 1, 2025; and

**WHEREAS**, the ESCLEW and the Governing Authority agree to the following modifications;

**NOW THEREFORE**, the parties modify the Contract as follows:

- 1. Article I, Section 1.4.** In the first sentence of the section insert “Certificate of any other registered name,” before “Employer ID Number.” The rest of Section 1.4 remains as originally written in the Contract.
- 2. Article II, Section 2.1.** Insert the following sentence as the final sentence of the section “All School Governing Authority members are required to submit to the Sponsor any instances where the School Governing Authority member is convicted, indicted or under investigation for a disqualifying offense under R.C. 3319.31 or R.C. 3319.39 within seventy-two (72) hours of learning of such indictment, conviction or investigation.” The rest of Section 2.1 remains as originally written in the Contract.
- 3. Article III, Section 3.2.** Insert the following sentence as the first sentence of the section: “The School Governing Authority is responsible for the governance, management and administration of the School and shall be responsible for carrying out the provisions of this Contract, provided however, pursuant to this Section, the School Governing Authority may enter into any contract for management or operation of the School or its curriculum or operations, or any portion thereof.” The rest of Section 3.2 remains as originally written in the Contract.
- 4. Article IV, Section 4.1.**
  - a. In the first sentence of the section insert “3313.8110” in the appropriate numerical order.
  - b. In the seventh paragraph of the section, delete the words “state board” and replace with “Department of Children and Youth.”
  - c. The rest of Section 4.1 remains as originally written in the Contract.
- 5. Article VI, Section 6.6.** In the first sentence of the section delete “3314.08(F) or.” The rest of Section 6.6 remains as originally written in the Contract.

- 6. **Article VI, Section 6.12, division a.** Insert the words “creed, sex” prior to the word “race.” The rest of Section 6.12, division (a) remains as originally written in the Contract.
- 7. **Article VIII, Section 8.1.** Insert the phrase “pursuant to R.C. 3314.104,” after the word “Notwithstanding.” The rest of Section 8.1 remains as originally written in the Contract.
- 8. **Article XI, Section 11.7, division a.** Insert as the last sentence of division (a) “Any contract that is renewed under this division remains subject to the provisions of R.C. 3314.07, 3314.072, and 3314.073. The rest of Section 11.7 remains as originally written in the Contract.

ALL OTHER SECTIONS, SUBSECTIONS, TERMS, OR PROVISIONS OF THE CONTRACT SHALL REMAIN IN FULL FORCE AND IN EFFECT UNLESS OTHERWISE SPECIFICALLY MODIFIED HEREIN.

**Educational Service Center of Lake Erie West**

**Governing Authority of The Intergenerational School**

By: \_\_\_\_\_  
(Signature)

By: \_\_\_\_\_  
(Signature)

Its: Superintendent

Its: President

with full authority to execute this Contract for and on behalf of **Sponsor** and with full authority to bind **Sponsor**.

with full authority to executive this Contract for and on behalf of **Governing Authority** and with full authority to bind **Governing Authority**.

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

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

# Coversheet

## Near West Only: Reading Improvement Plan

**Section:** V. Consent Agenda (Please read Board Resolutions for Personnel Action detail)  
**Item:** F. Near West Only: Reading Improvement Plan  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** NWIS-Reading\_Improvement\_Plan.pdf

## Reading Improvement Plan

**DISTRICT/COMMUNITY SCHOOL NAME:** Near West Intergenerational School (NWIS)

**IRN:** 012030

**ADDRESS:** 3805 Terrett Avenue, Cleveland, OH 44113

### Section 1: Developing, Monitoring, and Communicating

The NWIS Reading Improvement Plan was developed collaboratively by school leadership, instructional staff, intervention specialists and SpEd service providers, and family engagement representatives. The team analyzed multiple data sources including NWEA MAP Reading growth and achievement data (Fall–Spring), Ohio State Report Card indicators, K–3 literacy measures, and sponsor feedback from the CMSD Annual Charter Sponsorship Report.

Implementation is monitored through data reviews, Teacher-Based Teams (TBTs), classroom walk-throughs, and coaching cycles. Progress and adjustments are communicated to staff through professional learning communities and to families through conferences, newsletters, and literacy-focused family events.

### Section 2: Alignment Between the Reading Improvement Plan and Overall Improvement

The Reading Improvement Plan is fully aligned with NWIS’s continuous improvement efforts and its mission to connect, create, and guide lifelong learners. Literacy goals are embedded within the school’s instructional priorities, MTSS framework, and professional development plan. High expectations for all learners are reflected through consistent use of evidence-based instructional materials aligned to the science of reading, targeted interventions, and a strong emphasis on equity, gap closing, and student growth.

The plan supports NWIS’s strong academic performance, as evidenced by exceeding expectations across all academic indicators, including K–3 Literacy and Gap Closing, while addressing identified areas for refinement in stamina, comprehension, and middle school engagement.

### Section 3, Part A: Performance Data

**Full School Year MAP Data** -Click this link to access Near West MAP Data.

**NWEA MAP Reading (ELA) Summary:** - Whole School Growth: 59th percentile

- Whole School Achievement: Increased from 59th to 63rd percentile

**Primary (K–2):** Kindergarten achievement increased to the 69th percentile with no students in the lowest achievement band. - Grades 1–2 demonstrated steady growth

(57th–59th percentile) and increased percentages of students in the 61st–80th percentile bands. - Strong alignment to Bookworms and foundational skills instruction.

**Developing (Grades 3–4):** Grade 3 achievement increased significantly from the 58th to the 73rd percentile. - Grade 4 reduced students in the lowest band from 19% to 7%.

**Refining (Grades 5–6):** Grades 5–6 showed solid growth (61st–65th percentile) with improved achievement and movement out of lower bands.

**Applying (Grades 7–8):** Growth ranged from the 50th–62nd percentile. - Slight dips in achievement highlight a need for increased engagement, stamina, and high-interest texts.

### Section 3, Part B: Internal and External Factors Contributing to Underachievement

**Internal Factors:** -Need for continued focus on reading stamina and comprehension at upper grades. - Variability in middle school engagement and motivation. - Ongoing need for consistent implementation of targeted interventions.

**External Factors:** Varied levels of family access to literacy resources at home. Attendance and transportation challenges for some students.

### Section 3, Part C: Root Cause Analysis

Analysis indicates that when instruction is tightly aligned to evidence-based practices (i.e., Bookworms, small-group instruction, coaching cycles), students demonstrate strong growth. Areas of underachievement are most often linked to inconsistent engagement, limited stamina for complex texts, and the need for more intense, differentiated supports in upper grades.

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## Section 4: Literacy Vision and Mission Statement

NWIS believes all students can become confident, proficient readers through engaging, rigorous, and inclusive literacy experiences. Our literacy goals align with Ohio’s Plan to Raise Literacy Achievement by prioritizing the science of reading, high-quality instruction and materials, and responsive interventions to ensure equitable outcomes for every learner.

## Section 5: Measurable Learner Performance Goals and Adult Implementation Goals

**Learner Performance Goals:** - By Spring 2026, increase whole-school MAP Reading achievement to at least the 65th percentile. - Reduce the percentage of students below the 40th percentile in reading by 10% across all grade bands. - Ensure 100% of K–3 students identified as off-track have active Reading Improvement and Monitoring Plans (RIMPs).

**Adult Implementation Goals:** - 100% of teachers will implement science-of-reading aligned practices with fidelity. - All teachers will participate in ongoing data-driven coaching cycles and participate in teacher-based teams focused on literacy.

## Section 6: Plan Map

**Goal Statement:** Improve reading comprehension and stamina across grades 3–8.

**Evidence-Based Strategies:** - Explicit comprehension instruction - Small-group guided reading - Use of high-interest, culturally relevant texts

**Action Steps:** 1. Implement daily structured literacy blocks with guided practice. 2. Use MAP and diagnostic data to form targeted groups.

**Measures of Success:** - Increased MAP Reading growth percentiles. - Reduction in students scoring below the 40th percentile.

## Section 7: Monitoring Progress and Implementation

Progress is monitored through MAP assessments, classroom observations, TBT data reviews, RIMP monitoring, and frequent check-ins.

# Coversheet

## Annual Student Success & Wellness Narrative

**Section:** V. Consent Agenda (Please read Board Resolutions for Personnel Action detail)  
**Item:** G. Annual Student Success & Wellness Narrative  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** Student Success & Wellness Funds Narrative.pdf



# Intergenerational S C H O O L S

## State Student Success and Wellness Funds as part of an overall Wellness Strategy

### Overview

The Intergenerational Schools are dedicated to nurturing the whole child through a thoughtful, integrated approach to student success and wellness. By strategically investing these State funds in programs and services that promote mental health, physical well-being, and academic growth, we create an environment where students are supported both inside and beyond the classroom. These efforts ensure students develop not only strong academic skills, but also the emotional, social, and physical foundations needed for long-term success. The State Student Success and Wellness Funds are essential in sustaining and strengthening this comprehensive support system.

### Accessible Mental Health Services and a full-time School Counselor role

The schools maintain partnerships with external organizations such as The Centers and Ohio Guidestone, the Cleveland Clinic, and Total Education Solutions, which provide various services, including on-site student therapy and mental health appointments. Our full-time in-house School Counselors (one at each school) coordinate all referrals and care plans, as well as respond to immediate student and family needs, and run programs for proactive social and emotional skill development. This ensures consistent, immediate access to mental health support for both students and staff throughout the school day.

The School Counselors play an active role in each school's Student Support Team, comprised of several leadership positions, and are charged with ongoing identification, alignment of care, and monitoring of high-need students who may be struggling with mental, physical health or attendance. This position is vital in connecting families to the right resources and creating a trusting, supportive space where students feel comfortable sharing concerns and receiving meaningful guidance.

### Wellness Coordinator Role

In addition to School Counselors, each school employs a full-time Wellness Coordinator to address students' daily physical health needs. Serving as clinical support throughout the school day, the Wellness Coordinators assist students who are ill, need basic first aid or prescribed medications, or have chronic health conditions like diabetes or sickle cell anemia.

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[www.igschools.org](http://www.igschools.org)

The Intergenerational  
School - East  
11327 SHAKER BLVD. SUITE 200E  
CLEVELAND, OHIO 44104

Near West  
Intergenerational School  
3805 TERRETT AVENUE  
CLEVELAND, OHIO 44113

This role also extends beyond immediate health care by partnering with families to address challenges that may impact student attendance, including housing instability and transportation barriers. Working closely with the School Counselor, the Wellness Coordinator helps ensure a coordinated and comprehensive approach to student wellness.

### Intergenerational Programming

Intergenerational programming is a cornerstone of The Intergenerational Schools’ mission, strengthening relationships and shared learning between students and older adults. To support this work, the school employs a full-time Director of Intergenerational Programs and Lifelong Learning. Part of this role includes organizing and facilitating meaningful interactions between students and partner nursing homes.

Wellness Funds support a portion of this role, helping sustain programming that enhances students’ social skill development, empathy, and communication skills while reinforcing the school’s unique intergenerational model.

### Reading Intervention Teacher

To strengthen literacy outcomes for students who needed additional support, TIS-East (our east side school) invested in specialized reading intervention staff. These experienced educators deliver intensive, focused literacy instruction tailored to accelerate reading skill development and close learning gaps. The Student Success and Wellness Funds help offset the cost of one intervention teacher position, allowing the school to maintain consistent, small group, high-impact reading support for students working toward grade-level proficiency.

### Budget Overview

#### The Intergenerational School (TIS-East)

Staff	Amount
Certified School Counselor (Portion of Salary)	\$66,126
Reading Intervention Teacher (Portion of Salary)	<u>\$24,876</u>
	\$91,002



**Near West Intergenerational School**

<b>Staff</b>	<b>Amount</b>
Certified School Counselor (Portion of Salary)	\$51,179
Wellness Coordinator (Portion of Salary)	\$30,213
IG Programming (Portion of Salary)	<u>\$6,237</u>
	\$87,629

**Conclusion**

The State Student Success and Wellness Funds are a critical resource in advancing comprehensive support available to students and families at The Intergenerational Schools. Through continued investment in mental health care, physical wellness services, and enriching educational programs, we foster a nurturing environment where students can grow academically, emotionally, and socially. Our ongoing commitment to serving the whole child ensures that every student has the support and resources needed to thrive now and into the future.



# Coversheet

## Approval of March Financials

**Section:** VI. Finance  
**Item:** A. Approval of March Financials  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** IGC - Mar'26 Financial Report.pdf  
TIS - Mar'26 Financial Report.pdf  
NWIS - Mar'26 Financial Report.pdf  
IG Network - Mar'26 Financial Summary.pdf



## Financial Report – March 2026

### **Key Financials:**

(in \$thousands)

o YTD Net Income	+\$230
o FY26 Projected Net Income	(\$55)
o FY26 Projected Budget Variance	+\$29
o Month-end Cash Balance	+\$1,217
o Unrestricted Net Assets	+\$1,008

### **Fiscal Health:**

<b>Benchmarks</b>		<b>IGC</b>
<b>Liquidity Ratio Index</b>	$\frac{\text{Current Assets}}{\text{Current Liabilities}}$	2.41
<b>Operating Cash Ratio</b>	$\frac{\text{Total Cash}}{\text{Avg. Monthly Exp.}}$	20.97 months
<b>Reserve Ratio Index</b>	$\frac{\text{Fund Balance}}{\text{Avg. Monthly Exp.}}$	17.37 months

Note: Fund Balance is equal to Unrestricted Net Assets plus Net income.

### **Treasurer Notes:**

o **FY26 Projection**

Intergenerational Cleveland's FY26 surplus through March was \$165,122. The year-end deficit is projected to be (\$55,170) based upon anticipated receipts and disbursements. FY26 Core Program Receipts are projected to be \$641,084, a favorable \$20,584 budget variance. The Core Program Expenses for FY26 are projected to be (\$307,116), an unfavorable \$8,359 budget variance. As a result, the projected FY26 core budget variance is a favorable \$28,943 based upon current revenue and expense assumptions.

### **Proposed Board Action Items:**

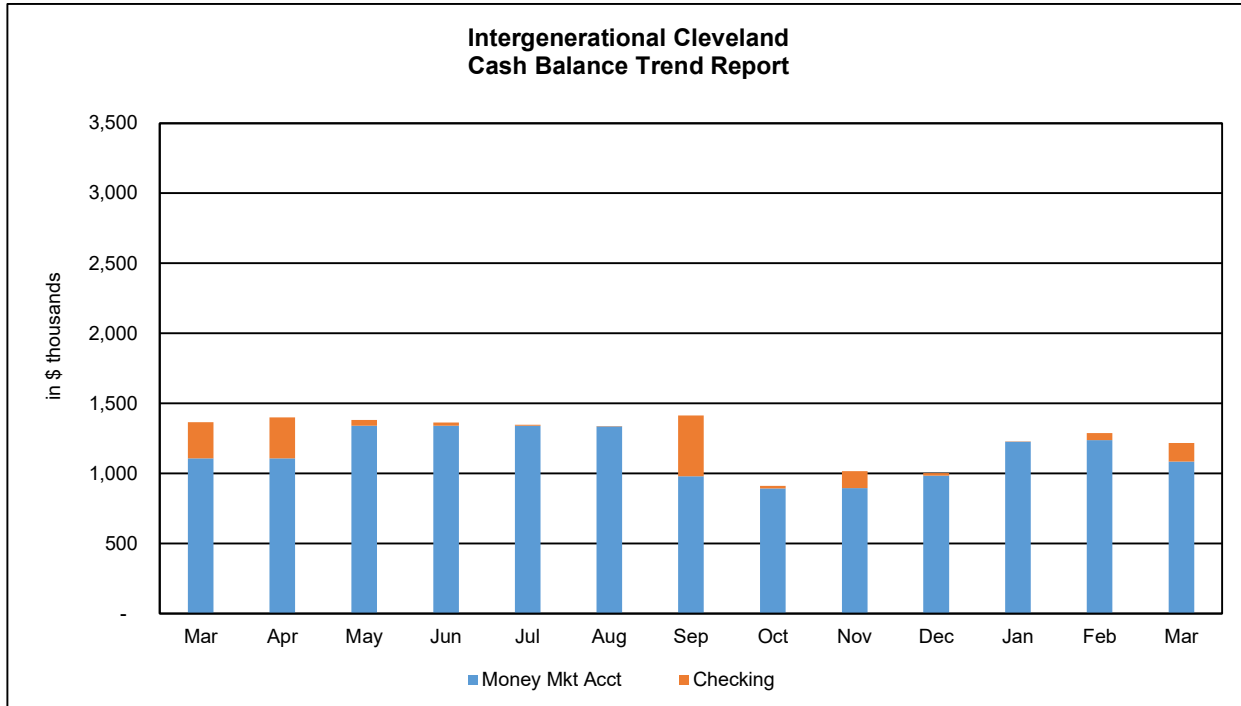
- 1) Continue planning related to IGC long-term financial goals, including specific benchmarks related to revenue generation and/or expenses reduction objectives for FY27 and beyond.
- 2) Continue to develop and plan a CMO structure for the two IG schools.

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.

## Financial Report – March 2026

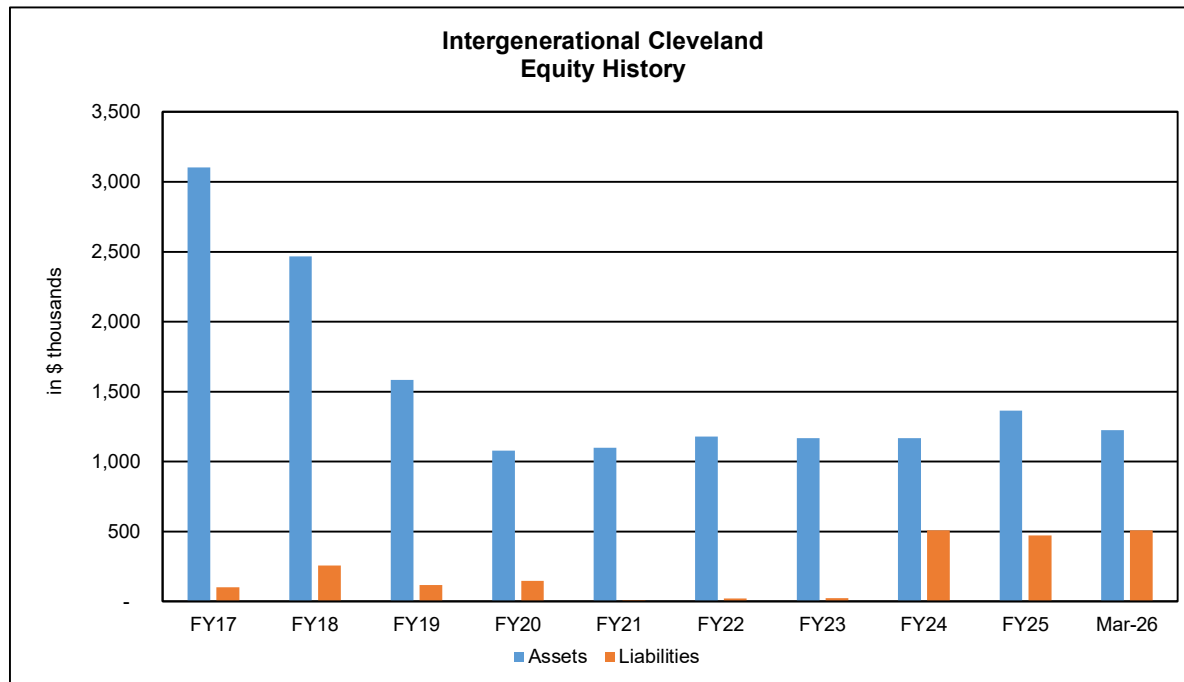
### Cash Position

The chart below provides the month-end cash balances for IGC over the past 13 months. Cash balances are expected to decrease during the remainder of Fiscal Year based on the current operating revenue and expense projections.



### Equity Position History

The chart below outlines the IGC balance sheet totals based upon prior financial reports for Fiscal Year 2017 through February 2026. Both assets and liabilities reduced significantly during FY17 to FY20 as a result of Base Support distributions to the schools. FY26 & February 2026 are based upon pre-audit financials.



The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



## Financial Report – March 2026

### FY26 Projection

Intergenerational Cleveland's FY26 surplus through March was \$165,122. The year-end deficit is projected to be (\$55,170) based upon anticipated receipts and disbursements. FY26 Core Program Receipts are projected to be \$641,084, a favorable \$20,584 budget variance. The Core Program Expenses for FY26 are projected to be (\$307,116), an unfavorable \$8,359 budget variance. As a result, the projected FY26 core budget variance is a favorable \$28,943 based upon current revenue and expense assumptions.

	YTD Actual (1)	FY26 Projection (2)	FY26 Act + Proj	FY26 Budget (3)	Budget Variance
<b>REVENUE</b>					
Direct Support	\$ 390,252	\$ 192,748	\$ 583,000	\$ 583,000	\$ -
School Revenues	-	37,500	37,500	37,500	-
Other Revenues 4	20,574	-	20,584	-	20,584
<b>TOTAL REVENUE</b>	<b>410,826</b>	<b>230,248</b>	<b>641,084</b>	<b>620,500</b>	<b>20,584</b>
<b>EXPENSES</b>					
Admin/Ops Staff	\$ (109,320)	\$ (40,990)	\$ (150,311)	\$ (164,199)	\$ 13,888
Purchased Services (excl rent)	(53,082)	(86,639)	(139,722)	(137,790)	(1,932)
Supplies	(3,106)	(1,191)	(4,297)	(2,500)	(1,797)
Other Expenses 5	(15,196)	2,409	(12,787)	(10,986)	(1,801)
<b>TOTAL EXPENSES</b>	<b>(180,704)</b>	<b>(126,412)</b>	<b>(307,116)</b>	<b>(315,475)</b>	<b>8,359</b>
<b>CORE PROGRAM SURPLUS/DEFICIT</b>	<b>\$ 230,122</b>	<b>\$ 103,836</b>	<b>\$ 333,968</b>	<b>\$ 305,025</b>	<b>\$ 28,943</b>
<b>EXTRAORDINARY REVENUE &amp; EXPENSES</b>					
IGC Base Support	\$ (65,000)	\$ (324,138)	\$ (389,138)	\$ (389,138)	\$ -
<b>SURPLUS/DEFICIT incl Extraordinary Item</b>	<b>\$ 165,122</b>	<b>\$ (220,302)</b>	<b>\$ (55,170)</b>	<b>\$ (84,113)</b>	<b>\$ 28,943</b>

Notes

- 1 YTD Actuals are cash transactions for FY26 activities for the period of 07/01/25 to 03/31/26 (excludes prior FY activity).
- 2 FY26 Projections are anticipated cash transactions for remaining FY26 activity (includes FY26 accruals to be paid/rec'd after 06/30/26).
- 3 FY26 Budget is based upon the approved budget.
- 4 Other revenues include miscellaneous revenues, billbacks and interest.
- 5 Positive remaining expenses attributed to billbacks to be received by IGC from the schools.



## Financial Report – March 2026

### Equity Position

The chart below outlines the balance sheet totals for the current and prior year months. All of the information in this financial report is based upon pre-audit estimates using available information as of April 14, 2026. This information should not be used for official financial analysis or reporting. It is provided solely for the use of the Board and Administration to facilitate future financial planning.

<b>Intergenerational Cleveland</b> <b>Balance Sheet Summary</b> <b>March 2026 and March 2025</b>
--------------------------------------------------------------------------------------------------------

ASSETS	3/31/2026	3/31/2025	\$ Change
<b>Current Assets</b>			
Cash	\$ 1,216,925	\$ 1,156,536	\$ 60,389
Accounts Receivable	7,063	-	7,063
Intranetwork Receivable (1)	-	1,252	290,602
Other Current Assets	(184)	-	(184)
<b>Total Current Assets</b>	<b>1,223,804</b>	<b>1,157,788</b>	<b>357,870</b>
<b>Non-Current Assets</b>			
Capital Assets, net	\$ -	\$ 72	\$ (72)
Other Non-Current Assets	-	-	-
<b>Total Non-Current Assets</b>	<b>-</b>	<b>72</b>	<b>(72)</b>
<b>TOTAL ASSETS</b>	<b>\$ 1,223,804</b>	<b>\$ 1,157,860</b>	<b>\$ 357,798</b>
<b>LIABILITIES</b>			
<b>Current Liabilities</b>			
Accounts Payable	\$ 190,793	\$ 28,064	\$ 162,729
IGC Base Support (2)	291,854	-	291,854
Wages & Benefits Payable	-	7,512	(7,512)
Other Current Liabilities	25,316	-	25,316
<b>Total Current Liabilities</b>	<b>507,963</b>	<b>35,576</b>	<b>472,387</b>
<b>Non-Current Liabilities</b>			
Note Payable	\$ -	\$ -	\$ -
Other Non-Current Liabilities	-	-	-
<b>Total Non-Current Liabilities</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>TOTAL LIABILITIES</b>	<b>\$ 507,963</b>	<b>\$ 35,576</b>	<b>\$ 472,387</b>
<b>NET EQUITY</b>			
<b>Net Assets</b>			
Invested in Capital Assets, net	\$ -	\$ 72	\$ (72)
Restricted	(464)	(464)	-
Unrestricted	1,007,695	1,187,812	(180,117)
<b>TOTAL NET ASSETS (3)</b>	<b>715,841</b>	<b>1,225,198</b>	<b>(114,589)</b>
<b>TOTAL LIABILITIES &amp; NET ASSETS</b>	<b>\$ 1,223,804</b>	<b>\$ 1,260,774</b>	<b>\$ 357,798</b>

#### Notes

- Accounts Payable include support payments receivable by network schools.
- IGC Base Support includes funds obligated to NWIS and TIS including the Sauerland fund.
- Total Net Assets are preliminary estimates based upon pre-audit financial information.

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



## Financial Report – March 2026

### **Key Financials:**

(in \$thousands)

o YTD Core Program Net Income	(\$503)
o FY26 Core Program Projected Net Income	(\$803)
o FY26 Core Program Projected Budget Variance	+\$143
o FY26 Projected Net Income w/ HQ funding and IGC	(\$696)
o Month-end Cash Balance	+\$3,415
o Unrestricted Net Assets	+\$3,562

### **Fiscal Health:**

<b>Financial Benchmarks</b>		<b>Standard</b>	<b>TIS</b>	<b>Status</b>
<b>Liquidity Ratio Index*</b>	$\frac{\text{Current Assets}}{\text{Current Liabilities}}$	1.0 to 1.1	7.32	<b>Exceeds</b>
<b>Operating Cash Ratio*</b>	$\frac{\text{Total Cash}}{\text{Avg. Monthly Exp.}}$	1.0 to 2.0 Months Cash	8.5 months	<b>Exceeds</b>
<b>Reserve Ratio Index</b>	$\frac{\text{**Fund Balance}}{\text{Avg. Monthly Exp.}}$	0.40 to 0.75	8.86 months	<b>Exceeds</b>
<b>Projected FTE Variance - March 2026*</b>	$\frac{\text{Actual FTE}}{\text{Budgeted FTE}}$	90.0%-94.9% of Budget	98.2%	<b>Exceeds</b>

\*School sponsor reporting requirement

\*\*Fund Balance is equal to Unrestricted Net Assets plus Net income.

### **Treasurer Notes:**

o **FY26 Projection**

The Intergenerational School's FY26 deficit through March was (\$502,970). The year-end deficit is projected to be (\$696,140) based upon anticipated receipts and disbursements. FY26 Core Program Receipts are projected to be \$3,944,591, a favorable \$133,677 budget variance. The Core Program Expenses for FY26 are projected to be (\$4,747,526), a favorable \$9,510 budget variance. As a result, the projected FY26 core budget variance is a favorable \$143,187 based upon current revenue and expense assumptions.

o **FY26 FTE Student Enrollment**

The Intergeneration School's enrollment was budgeted at 223 full-time equivalent (FTE) students. As of April 12th, enrollment was 216, according to PowerSchool. The State Foundation payment for March 2026 was based on 217.11 FTEs. Variances between the systems are being addressed.

### **Proposed Board Action Items:**

- 1) **Continue discussions related to the need to ramp up philanthropic support.**

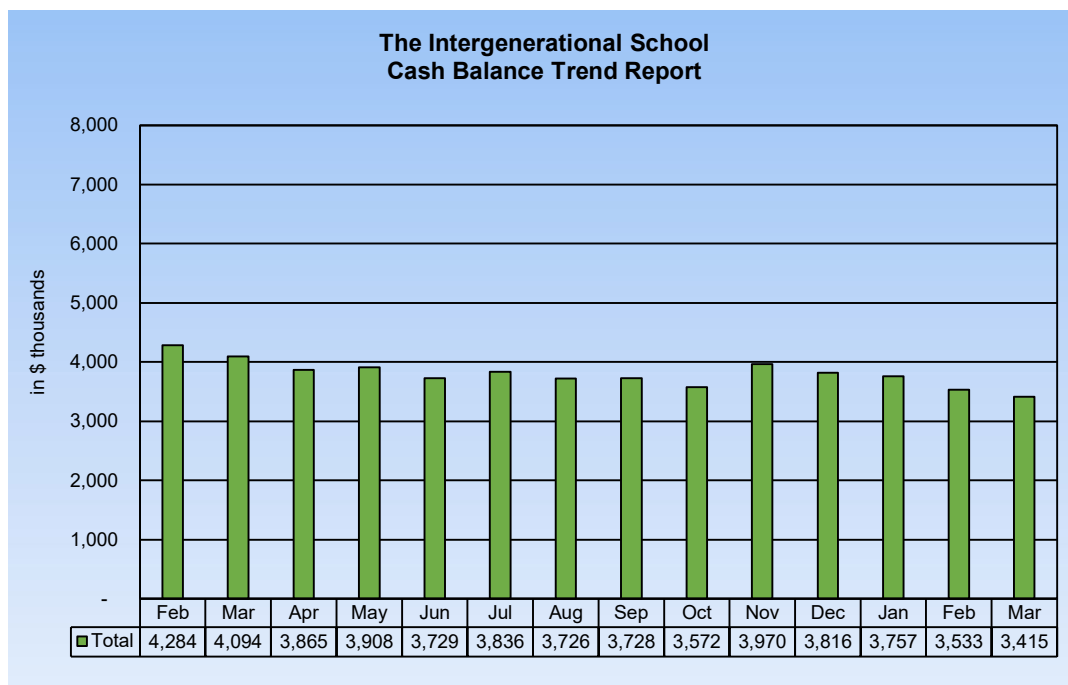


## Financial Report – March 2026

### Cash Position

The total cash balance for The Intergenerational School was \$3,414,860 at the end of March. Unrestricted Funds closed the month at \$4,424,870. The Restricted Funds closed the month at (\$1,010,009). Cash flow trend details for the past 13 months are provided on the chart below. Increased cash position due to the combined TIS/LIS bank balances in July and the CMSD levy funding.

MONTH END CASH BALANCE DETAIL	
<i>Unrestricted Funds</i>	
General	\$ 5,251,619
Food	(341,514)
IGC Expense	(485,235)
Subtotal	\$ 4,424,870
<i>Restricted Funds</i>	
Athletic Fund	\$ (13,892)
Dollar General	\$ (2,191)
Donate to Cancer	\$ 222
Facilities	\$ -
Misc State	\$ 12,094
Parent Group	\$ 7,320
Safety Grant	\$ (27,973)
SCG	\$ (252,489)
Schoolwide	\$ (1,013,690)
Sensory	\$ 210
St. Luke's Grant	\$ 370
Title I	\$ 302,789
Title VI-B	\$ (32,059)
Wellness	\$ 9,280
Subtotal	\$ (1,010,009)
<b>Total</b>	<b>\$ 3,414,860</b>



### Bank Reconciliation

The table below provides a summary of The Intergenerational School reconciliation for the period ending March 31, 2026. The ending book balance was \$3,414,860. The ending bank statement balance was \$3,328,322. Outstanding checks (checks that have been sent, but not yet cashed) totaled (\$86,538). Monthly interest from the STAR Ohio account was \$10,155.

The Intergenerational School	
March 31, 2026	
<b>Book Balance</b>	
Beginning Book Balance	\$ 3,532,990
<b>Ending Book Balance</b>	<b>\$ 3,414,860</b>
<b>Bank Balance</b>	
Key Bank Balance	317,222
Erie Bank Balance	261
STAR Ohio Balance	3,010,839
<b>Ending Bank Balance</b>	<b>\$ 3,328,322</b>
Outstanding Items	(86,538)
<b>Reconciled Cash Balance</b>	<b>\$ 3,414,860</b>

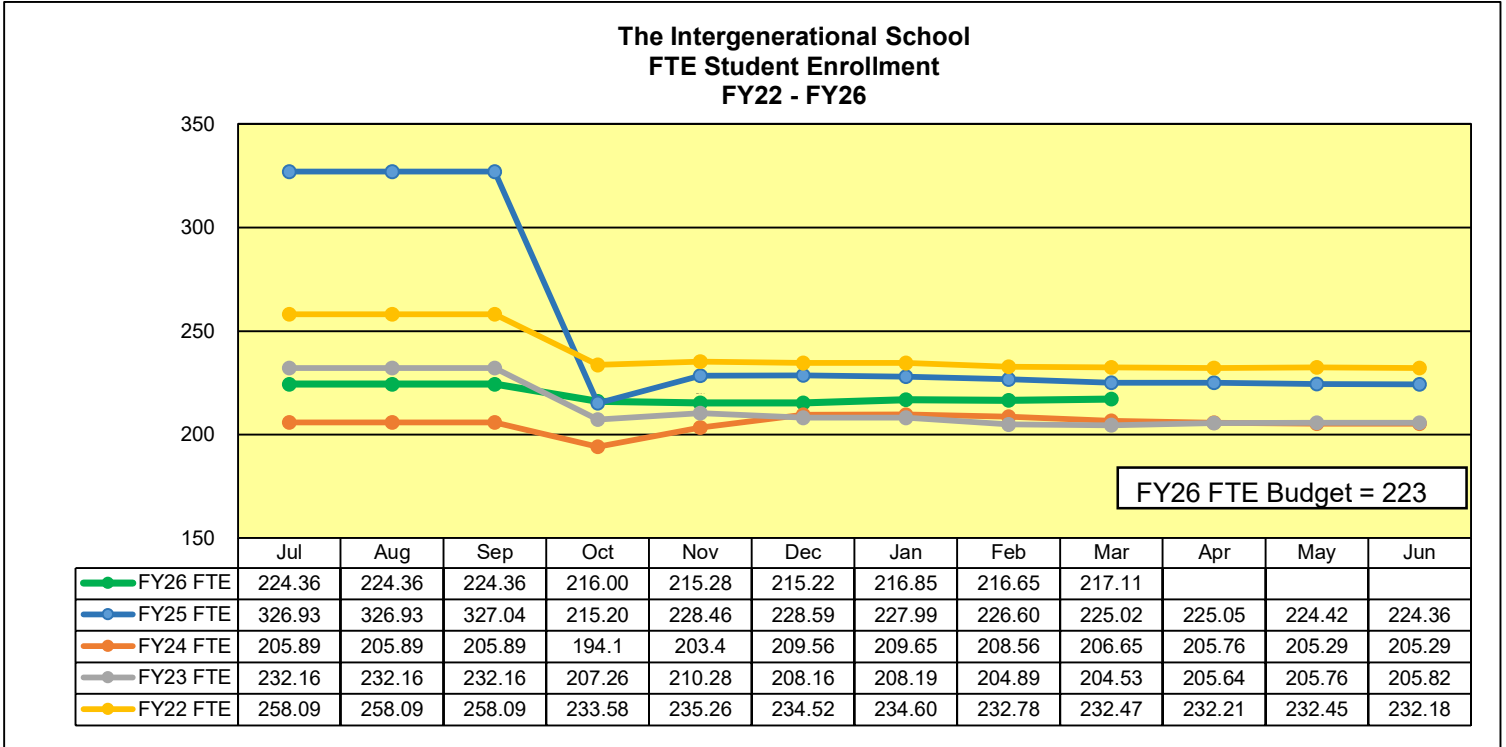
The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



## Financial Report – March 2026

### Student Enrollment

The chart below provides a trend line summary of Full Time Equivalent (FTE) student enrollment. The October Foundation Report reflects the change in FTE's for the new school year. The FTE totals for subsequent months are based upon FTE student data as reported by the Ohio Department of Education through the monthly State Settlement reports. TIS enrollment was 217.11 in March, which is -5.89 FTE below budget.



### Federal Programs

The chart below provides a summary of the FY26 federal allocations for The Intergenerational School Consolidated Federal Programs (CCIP). Allocations are earmarked for salaries, benefits and professional development services. The CCIP allocation for FY26 is \$1,239,716. Disbursements have totaled \$678,417 year-to-date. Receipts have totaled \$171,290 year-to-date.

The Intergenerational School CCIP - Federal Education Programs						
Federal Program	Schoolwide	IDEA-B				Totals
<b>FY26 Allocation</b>	\$ 1,180,366	\$ 59,350				<b>\$ 1,239,716</b>
YTD Receipts	136,954	34,336				<b>171,290</b>
YTD Disbursements	642,505	35,912				<b>678,417</b>
<b>Fund Balance</b>	(505,551)	(1,576)				<b>(507,127)</b>
Encumbered Funds	537,861	23,438				<b>561,299</b>
Allocation Balance	\$ -	\$ -			\$ -	<b>\$ -</b>

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



## Financial Report – March 2026

### FY26 Projection

The Intergenerational School's FY26 deficit through March was (\$502,970). The year-end deficit is projected to be (\$696,140) based upon anticipated receipts and disbursements. FY26 Core Program Receipts are projected to be \$3,944,591, a favorable \$133,677 budget variance. The Core Program Expenses for FY26 are projected to be (\$4,747,526), a favorable \$9,510 budget variance. As a result, the projected FY26 core budget variance is a favorable \$143,187 based upon current revenue and expense assumptions.

	YTD Actual (1)	FY26 Projection (2)	FY26 <sup>(4)</sup> Act + Proj	FY26 Budget (3)	Budget Variance
<b>FTE ENROLLMENT (4)</b>	217.11	1.89	219.00	223.00	(4.00)
<b>REVENUE</b>					
State Foundation (excl SPED)	\$ 1,488,216	\$ 540,612	\$ 2,028,828	\$ 2,040,957	\$ (12,129)
CCIP Funding (excl Title VI-B)	136,954	159,094	296,048	303,629	(7,581)
Facilities Funding	164,556	48,114	212,671	223,000	(10,329)
Levy and Casino	225,695	254,674	480,369	480,369	-
Charter School Equity Supplement	84,335	24,274	108,608	111,500	(2,892)
<b>BASE REVENUE</b>	<b>\$ 2,099,755</b>	<b>\$ 1,026,768</b>	<b>\$ 3,126,524</b>	<b>\$ 3,159,455</b>	<b>\$ (32,931)</b>
State Foundation SPED	292,799	46,183	338,982	298,291	40,691
Title VI-B	34,336	25,014	59,350	59,350	-
Food Fund	84,061	17,849	101,910	115,500	(13,590)
Interest	176,509	7,996	184,505	122,444	62,061
Other Revenues (5)	127,116	6,205	133,320	55,874	77,446
<b>OTHER REVENUE</b>	<b>\$ 714,821</b>	<b>\$ 103,246</b>	<b>\$ 818,068</b>	<b>\$ 651,459</b>	<b>\$ 166,608</b>
<b>TOTAL REVENUE</b>	<b>2,814,577</b>	<b>1,130,015</b>	<b>3,944,591</b>	<b>3,810,914</b>	<b>133,677</b>
<b>EXPENSES</b>					
Instruction Staff	\$ (1,464,095)	\$ (429,598)	\$ (1,893,693)	\$ (1,962,148)	\$ 68,455
Admin/Ops Staff	(700,267)	(255,735)	(956,003)	(956,242)	239
Services & Supplies - Instruction	(339,590)	(266,806)	(606,396)	(695,600)	89,204
Services & Supplies - Administration	(330,691)	(291,955)	(622,646)	(515,308)	(107,338)
Services & Supplies - Food Services(6)	(109,332)	(19,668)	(129,000)	(175,000)	46,000
Services & Supplies - Facilities (7)	(327,018)	(150,799)	(477,818)	(401,460)	(76,358)
Miscellaneous	(46,554)	(15,417)	(61,971)	(51,278)	(10,693)
<b>TOTAL EXPENSES</b>	<b>(3,317,547)</b>	<b>(1,429,980)</b>	<b>(4,747,526)</b>	<b>(4,757,036)</b>	<b>9,510</b>
<b>SURPLUS/DEFICIT</b>	<b>\$ (502,970)</b>	<b>\$ (299,965)</b>	<b>\$ (802,935)</b>	<b>\$ (946,122)</b>	<b>\$ 143,187</b>
<b>EXTRAORDINARY REVENUE &amp; EXPENSES</b>					
Rent	-	(74,842)	(74,842)	(74,842)	-
IGC Base Support	-	181,637	181,637	181,637	-
HQ School Funding	-	-	-	-	-
<b>SURPLUS/DEFICIT incl Extraordinary Items</b>	<b>\$ (502,970)</b>	<b>\$ (193,170)</b>	<b>\$ (696,140)</b>	<b>\$ (839,327)</b>	<b>\$ 143,187</b>

Notes

- (1) YTD Actuals are cash transactions for FY26 activities for the period of 07/01/25 to 03/31/26 (excludes FY25 activity).
- (2) FY26 Projections are anticipated cash transactions for FY26 (includes FY26 accruals projected to be paid after 06/30/26).
- (3) FY26 Budget based upon the Board approved revised budget.
- (4) Projected enrollment is based on the expected year end enrollment.
- (5) Other revenue includes additional safety grant funding and medicaid reimbursements.
- (6) Meetings with school personnel set food service revenues at 79% of food costs and will be continued to be monitored going forward.
- (7) Facility costs are higher than anticipated to accommodate new safety grant costs and unanticipated flooding repairs.



## Financial Report – March 2026

### Equity Position

The chart below outlines the balance sheet totals for the current and prior year months. All of the information in this financial report is based upon pre-audit estimates using available information as of April 14, 2026. GASB 68 pension liability entries are not included in this Balance Sheet Summary as they are not a legal liability for the School. This information should not be used for official financial analysis or reporting. It is provided solely for the use of the Board and Administration to facilitate future financial planning.

**The Intergenerational School  
Balance Sheet Summary  
March 2026 and March 2025**

ASSETS	3/31/2026	3/31/2025	\$ Change
<b>Current Assets</b>			
Cash	\$ 3,414,860	\$ 2,559,795	\$ 855,065
Accounts Receivable	554,548	226,651	327,897
IGC Receivable	136,229	56,133	80,096
Other Current Assets	-	-	-
<b>Total Current Assets</b>	<b>4,105,637</b>	<b>2,842,579</b>	<b>1,263,058</b>
<b>Non-Current Assets</b>			
Capital Assets, net	1,405,560	1,238,740	166,820
Other Non-Current Assets	-	-	-
<b>Total Non-Current Assets</b>	<b>1,405,560</b>	<b>1,238,740</b>	<b>166,820</b>
<b>TOTAL ASSETS</b>	<b>\$ 5,511,197</b>	<b>\$ 4,081,319</b>	<b>\$ 1,429,878</b>
<b>LIABILITIES</b>			
<b>Current Liabilities</b>			
Accounts Payable	173,007	153,405	19,602
Wages & Benefits Payable (1)	350,125	484,273	(134,148)
Loan Payable	37,715	36,936	779
<b>Total Current Liabilities</b>	<b>560,847</b>	<b>674,614</b>	<b>(113,767)</b>
<b>Non-Current Liabilities</b>			
Note Payable	886,650	904,520	(17,871)
Other Non-Current Liabilities	-	-	-
<b>Total Non-Current Liabilities</b>	<b>886,650</b>	<b>904,520</b>	<b>(17,871)</b>
<b>TOTAL LIABILITIES</b>	<b>\$ 1,447,497</b>	<b>\$ 1,579,134</b>	<b>\$ (131,637)</b>
<b>NET EQUITY</b>			
<b>Net Assets</b>			
Invested in Capital Assets, net	481,195	334,220	146,975
Restricted	20,216	22,176	(1,960)
Unrestricted	3,562,289	2,182,725	1,379,564
<b>TOTAL NET ASSETS (2)</b>	<b>4,063,700</b>	<b>2,502,185</b>	<b>1,561,515</b>
<b>TOTAL LIABILITIES &amp; NET ASSETS</b>	<b>\$ 5,511,197</b>	<b>\$ 4,081,319</b>	<b>\$ 1,429,878</b>

Notes

- (1) Wage and Benefits Obligations include stretch pay for teachers and payroll tax liabilities.
- (2) Total Net Assets are preliminary estimates based upon pre-audit financial information.

The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



## Financial Report – March 2026

### Key Financials:

(in \$thousands)

- o YTD Core Program Net Income +\$151
- o FY26 Core Program Projected Net Income (\$668)
- o FY26 Core Program Projected Budget Variance +\$190
- o FY26 Projected Net Income w/ HQ funding and IGC (\$55)
- o Month-end Cash Balance +\$5,705
- o Unrestricted Net Assets +\$5,817

### Fiscal Health:

<b>Financial Benchmarks</b>		<b>Standard</b>	<b>NWIS</b>	<b>Status</b>
<b>Liquidity Ratio Index*</b>	$\frac{\text{Current Assets}}{\text{Current Liabilities}}$	1.0 to 1.1	14.56	<b>Exceeds</b>
<b>Operating Cash Ratio*</b>	$\frac{\text{Total Cash}}{\text{Avg. Monthly Exp.}}$	1.0 to 2.0 Months Cash	15.05 months	<b>Exceeds</b>
<b>Reserve Ratio Index</b>	$\frac{\text{**Fund Balance}}{\text{Avg. Monthly Exp.}}$	0.40 to 0.75	15.35 months	<b>Exceeds</b>
<b>Projected FTE Variance - March 2026*</b>	$\frac{\text{Actual FTE}}{\text{Budgeted FTE}}$	90.0%-94.9% of Budget	100.4%	<b>Exceeds</b>

\*School sponsor reporting requirement

\*\*Fund Balance is equal to Unrestricted Net Assets plus Net income.

### Treasurer Notes:

o **FY26 Projection**

Near West Intergenerational School's FY26 surplus through March was \$151,241. The year-end deficit is projected to be (\$55,422) based upon anticipated receipts and disbursements. FY26 Core Program Receipts are projected to be \$3,730,506, a favorable \$22,836 budget variance. The Core Program Expenses for FY26 are projected to be (\$4,398,403), a favorable \$167,394 budget variance. As a result, the projected FY26 core budget variance is an unfavorable (\$55,422) based upon current revenue and expense assumptions.

o **FY26 FTE Student Enrollment**

Near West Intergenerational School's enrollment was budgeted at 225 full-time equivalent (FTE) students. As of April 13th, enrollment was 230 according to PowerSchool. The State Foundation payment for March 2025 was based on 228.22 FTEs. Variances between the systems are being addressed.

### Proposed Board Action Items:

- 1) Continue discussions related to the need to ramp up philanthropic support.

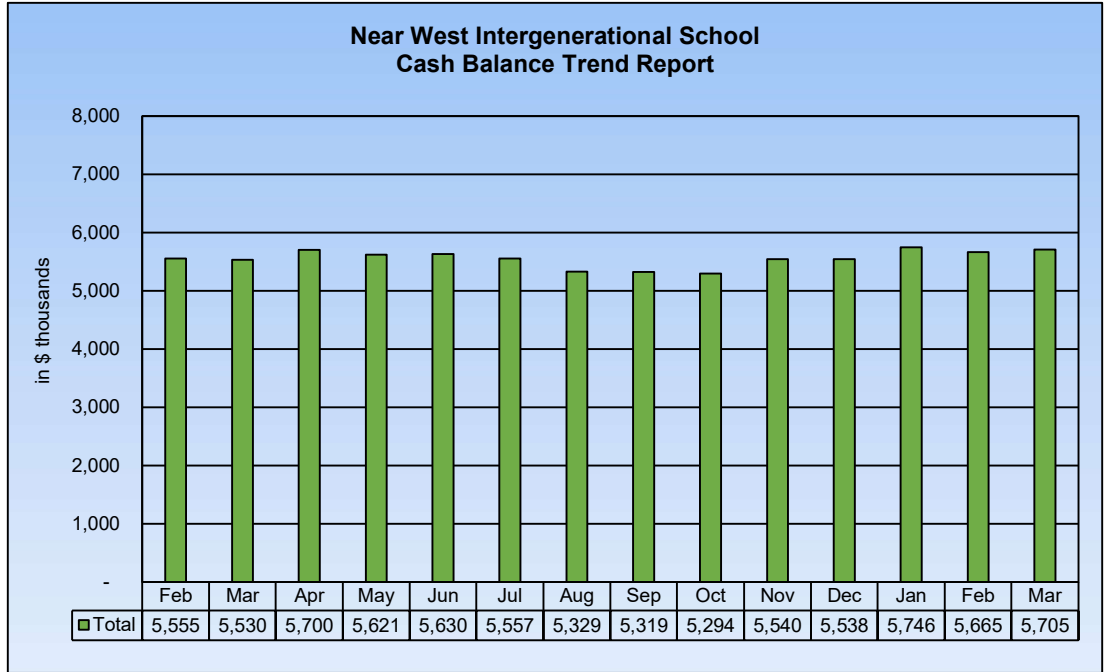


## Financial Report – March 2026

### Cash Position

The total cash balance for the Near West Intergenerational School was \$5,705,040 at the end of March. Unrestricted Funds closed the month at \$5,965,119. The Restricted Funds closed the month at (\$260,078). Cash flow trend details for the past 13 months are provided on the chart below. Increase in cash funding in January due to first half of HQ funding payment.

MONTH END CASH BALANCE DETAIL	
<i>Unrestricted Funds</i>	
General	\$ 6,139,850
Food	\$ (177,534)
IGC Expense	\$ 2,802
Subtotal	\$ 5,965,119
<i>Restricted Funds</i>	
Athletic Fund	\$ 55
Jennings	\$ 3,000
Misc State	\$ 9,920
Parent	\$ -
Safety Grant	\$ 10,206
Schoolwide	\$ (232,803)
SCG	\$ 6,212
Title VI-B	\$ (15,693)
Wellness	\$ (40,975)
Subtotal	\$ (260,078)
<b>Total</b>	<b>\$ 5,705,040</b>



### Bank Reconciliation

The table below provides a summary of Near West Intergenerational School reconciliation for the period ending March 31, 2026. The ending book balance was \$5,705,040. The ending bank statement balance was \$5,841,680. Outstanding checks (checks that have been sent, but not yet cashed) totaled (\$136,640). Monthly interest from the STAR Ohio account was \$17,810.

Near West Intergenerational School March 31, 2026	
<b>Book Balance</b>	
Beginning Book Balance	\$ 5,665,072
<b>Ending Book Balance</b>	<b>\$ 5,705,040</b>
<b>Bank Balance</b>	
Key Bank Balance	473,052
STAR Ohio Balance	5,368,628
<b>Ending Bank Balance</b>	<b>\$ 5,841,680</b>
Outstanding Checks	(136,640)
<b>Reconciled Cash Balance</b>	<b>\$ 5,705,040</b>

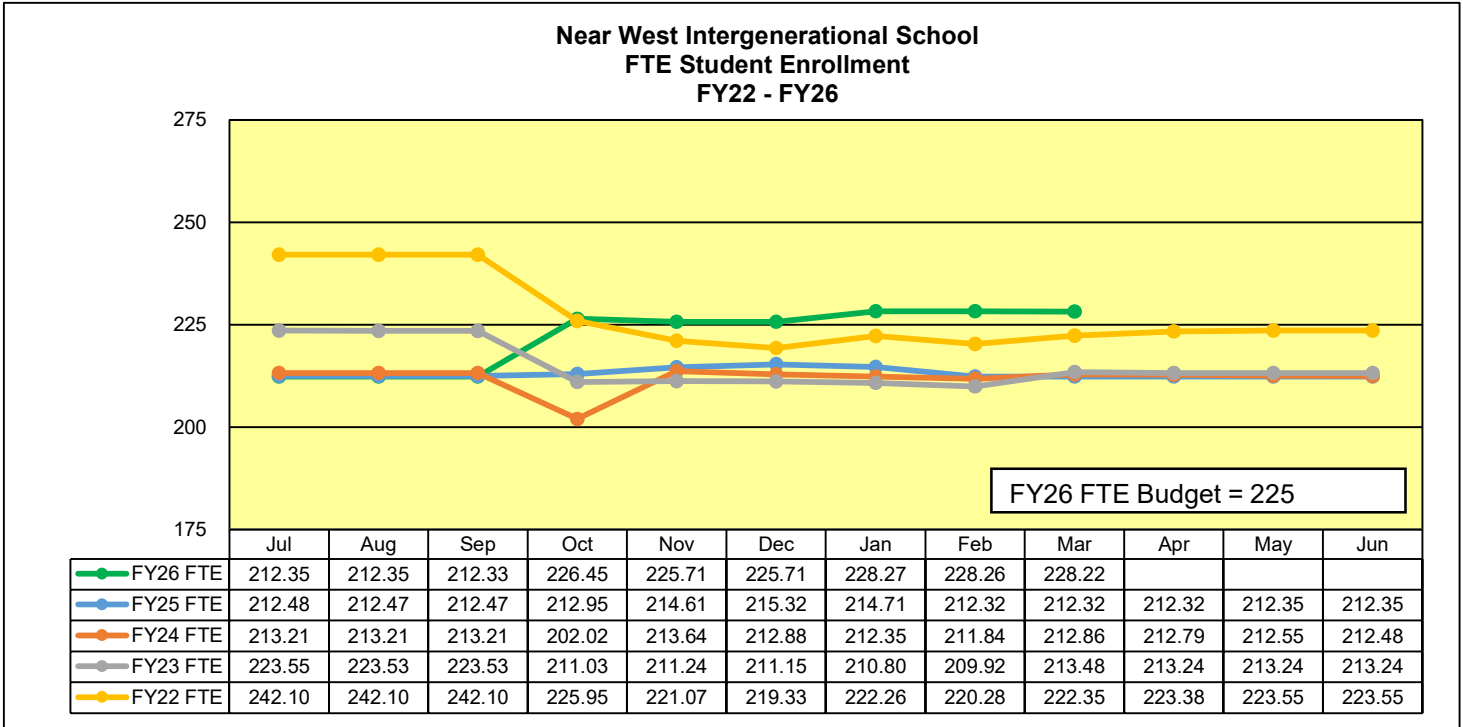
The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.



## Financial Report – March 2026

### Student Enrollment

The chart below provides a trend line summary of Full Time Equivalent (FTE) student enrollment. The October Foundation Report reflects the change in FTE's for the new school year. The FTE totals for subsequent months are based upon FTE student data as reported by the Ohio Department of Education through the monthly State Settlement reports. NWIS enrollment was 228.22 in March, which is 3.22 FTE above budget.



### Federal Programs

The chart below provides a summary of the FY26 federal allocations for the Near West Intergenerational School Consolidated Federal Programs (CCIP). Allocations are earmarked for salaries, benefits and professional development services. The CCIP allocation for FY26 is \$736,081. Disbursements have totaled \$407,502 year-to-date. Receipts have totaled \$0 year-to-date.

Near West Intergenerational School CCIP - Federal Education Programs						
Federal Program	Schoolwide	IDEA-B				Totals
<b>FY26 Allocation</b>	\$ 676,445	\$ 59,636				<b>\$ 736,081</b>
YTD Receipts	279,319	29,619				<b>308,939</b>
YTD Disbursements	372,426	35,077				<b>407,502</b>
<b>Fund Balance</b>	(93,106)	(5,457)				<b>(98,564)</b>
Encumbered Funds	299,590	24,556				<b>324,147</b>
Allocation Balance	\$ -	\$ -				<b>\$ -</b>



## Financial Report – March 2026

### FY26 Projection

Near West Intergenerational School's FY26 surplus through March was \$151,241. The year-end deficit is projected to be (\$55,422) based upon anticipated receipts and disbursements. FY26 Core Program Receipts are projected to be \$3,730,506, a favorable \$22,836 budget variance. The Core Program Expenses for FY26 are projected to be (\$4,398,403), a favorable \$167,394 budget variance. As a result, the projected FY26 core budget variance is an unfavorable (\$55,422) based upon current revenue and expense assumptions.

	YTD Actual (1)	FY26 Projection (2)	FY26 Act + Proj	FY26 Budget (3)	Budget Variance
<b>FTE ENROLLMENT (4)</b>	228.22	(2.22)	226.00	225.00	1.00
<b>REVENUE</b>					
State Foundation (excl SPED)	\$ 1,543,285	\$ 460,419	\$ 2,003,704	\$ 2,062,076	\$ (58,372)
CCIP Funding (excl Title VI-B)	117,716	51,395	169,111	170,286	(1,175)
Facilities Funding	167,799	55,468	223,267	225,000	(1,733)
Levy and Casino (5)	261,702	246,812	508,514	478,706	29,808
Charter School Equity Supplement	87,388	26,766	114,154	112,500	1,654
<b>BASE REVENUE</b>	<b>\$ 2,177,891</b>	<b>\$ 840,860</b>	<b>\$ 3,018,751</b>	<b>\$ 3,048,568</b>	<b>\$ (29,817)</b>
State Foundation SPED	214,527	66,456	280,983	335,871	(54,888)
Title VI-B	29,619	30,017	59,636	59,634	2
Food Fund	54,854	29,844	84,698	89,156	(4,458)
Interest	141,701	50,641	192,341	164,400	27,941
Other Revenues (6)	89,596	4,500	94,096	10,041	84,055
<b>OTHER REVENUE</b>	<b>\$ 530,298</b>	<b>\$ 181,458</b>	<b>\$ 711,755</b>	<b>\$ 659,102</b>	<b>\$ 52,653</b>
<b>TOTAL REVENUE</b>	<b>2,708,188</b>	<b>1,022,317</b>	<b>3,730,506</b>	<b>3,707,670</b>	<b>22,836</b>
<b>EXPENSES</b>					
Instruction Staff	\$ (1,244,405)	\$ (823,319)	\$ (2,067,725)	\$ (2,166,709)	\$ 98,984
Admin/Ops Staff	(513,374)	(281,314)	(794,687)	(876,995)	82,308
Services & Supplies - Instruction (6)	(217,658)	(284,540)	(502,197)	(564,098)	61,901
Services & Supplies - Administration (6)	(293,741)	(276,954)	(570,696)	(561,589)	(9,107)
Services & Supplies - Food Services	(78,894)	(40,106)	(119,000)	(135,000)	16,000
Services & Supplies - Facilities (7)	(183,613)	(128,308)	(311,921)	(220,476)	(91,445)
Capital	-	-	-	-	-
Miscellaneous	(25,263)	(6,915)	(32,177)	(40,930)	8,753
<b>TOTAL EXPENSES</b>	<b>(2,556,947)</b>	<b>(1,841,456)</b>	<b>(4,398,403)</b>	<b>(4,565,797)</b>	<b>167,394</b>
<b>SURPLUS/DEFICIT</b>	<b>\$ 151,241</b>	<b>\$ (819,139)</b>	<b>\$ (667,897)</b>	<b>\$ (858,127)</b>	<b>\$ 190,230</b>
<b>EXTRAORDINARY REVENUE &amp; EXPENSES</b>					
Rent	(87,500)	(62,500)	(150,000)	(150,000)	-
IGC Funding	-	207,500	207,500	207,500	-
HQ School Funding (7)	417,098	137,877	554,975	648,225	(93,250)
<b>SURPLUS/DEFICIT incl Extraordinary Items</b>	<b>\$ 480,839</b>	<b>\$ (536,262)</b>	<b>\$ (55,422)</b>	<b>\$ (152,402)</b>	<b>\$ 96,980</b>

Notes

- (1) YTD Actuals are cash transactions for FY26 activities for the period of 07/01/25 to 03/31/26 (excludes FY25 activity).
- (2) FY26 Projections are anticipated cash transactions for remaining FY26 activity (includes FY26 accruals to be paid/rec'd after 06/30/26).
- (3) FY26 Budget based upon the Board approved revised budget.
- (4) Projected enrollment is based on the expected year end enrollment.
- (5) Increased levy payment information due to higher than anticipated first levy deposit from CMSD.
- (6) Decrease in projected expenses to align with historical monthly (and summer) costs.
- (7) Increased other revenue attributed to \$44k in Ohio Safety Grant with similar increases in facility costs.
- (8) Decreased HQ funding totals attributed to total FY26 grant award to charter schools in Ohio higher than Ohio's budgeted grant total so each school is receiving a prorated total.

*The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.*



## Financial Report – March 2026

### Equity Position

The chart below outlines the balance sheet totals for the current and prior year months. All of the information in this financial report is based upon pre-audit estimates using available information as of April 16, 2026. GASB 68 pension liability entries are not included in this Balance Sheet Summary as they are not a legal liability for the School. This information should not be used for official financial analysis or reporting. It is provided solely for the use of the Board and Administration to facilitate future financial planning.

**Near West Intergenerational School  
Balance Sheet Summary  
March 2026 and March 2025**

ASSETS	3/31/2026	3/31/2025	\$ Change
<b>Current Assets</b>			
Cash	\$ 5,705,040	\$ 4,829,898	\$ 875,142
Accounts Receivable (1)	410,099	38,919	371,180
IGC Receivable	155,625	26,253	129,372
Other Current Assets	-	-	-
<b>Total Current Assets</b>	<b>6,270,764</b>	<b>4,895,070</b>	<b>1,375,694</b>
<b>Non-Current Assets</b>			
Capital Assets, net	20,377	33,078	(12,701)
Other Non-Current Assets	-	-	-
<b>Total Non-Current Assets</b>	<b>20,377</b>	<b>33,078</b>	<b>(12,701)</b>
<b>TOTAL ASSETS</b>	<b>\$ 6,291,141</b>	<b>\$ 4,928,148</b>	<b>\$ 1,362,993</b>
<b>LIABILITIES</b>			
<b>Current Liabilities</b>			
Accounts Payable (2)	\$ 151,093	\$ 200,842	\$ (49,749)
Wages & Benefits Payable	279,682	310,005	(30,323)
Loan Payable	-	-	-
<b>Total Current Liabilities</b>	<b>430,775</b>	<b>510,847</b>	<b>(80,072)</b>
<b>Non-Current Liabilities</b>			
Note Payable	-	-	-
Other Non-Current Liabilities	-	-	-
<b>Total Non-Current Liabilities</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>TOTAL LIABILITIES</b>	<b>\$ 430,775</b>	<b>\$ 510,847</b>	<b>\$ (80,072)</b>
<b>NET EQUITY</b>			
<b>Net Assets</b>			
Invested in Capital Assets, net	20,377	33,078	(12,701)
Restricted	23,181	29,675	(6,494)
Unrestricted	5,816,808	4,354,547	1,462,261
<b>TOTAL NET ASSETS (3)</b>	<b>5,860,366</b>	<b>4,417,301</b>	<b>1,443,065</b>
<b>TOTAL LIABILITIES &amp; NET ASSETS</b>	<b>\$ 6,291,141</b>	<b>\$ 4,928,148</b>	<b>\$ 1,362,993</b>

Notes

(1) Accounts Receivables include CCIP/Title, IGC and HQ fund revenues.

(2) Accounts payable includes CMSD rent and utility obligations.

(3) Total Net Assets are preliminary estimates based upon pre-audit financial information.

*The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.*



## Financial Report – March 2026

<b>Key Financials (in \$000s)</b>	<b>Schools Total</b>	<b>TIS</b>	<b>NWIS</b>		<b>IGC</b>
YTD Core Program Net Income	(\$385)	(\$503)	+\$118		+\$230
FY26 Core Program Projected Net Income	(\$1,476)	(\$803)	(\$673)		(\$55)
FY26 Core Program Projected Budget Variance	+\$328	+\$143	+\$185		+\$29
Month-End Cash Balance	+\$9,127	+\$3,415	+\$5,712		+\$1,217
Unrestricted Net Assets	+\$9,386	+\$3,562	+\$5,823		+\$1,008

<b>Fiscal Health Benchmarks</b>		<b>Standard</b>	<b>TIS</b>	<b>NWIS</b>		<b>IGC</b>
<b>Liquidity Ratio Index*</b>	$\frac{\text{Current Assets}}{\text{Current Liabilities}}$	1.0 to 1.1	7.32	14.57		2.41
<b>Operating Cash Ratio*</b>	$\frac{\text{Total Cash}}{\text{Avg. Monthly Exp.}}$	1.0 to 2.0 Months Cash	8.5 months	15.05 months		20.97 months
<b>Reserve Ratio Index</b>	$\frac{\text{Fund Balance}}{\text{Avg. Monthly Exp.}}$	0.40 to 0.75	8.86 months	15.35 months		17.37 months
<b>Projected FTE Variance - March 2026*</b>		90.0%-94.9% of Budget	98.2%	100.4%		---

Note: Fund Balance is equal to Unrestricted Net Assets plus Net income

\*School sponsor reporting requirement

### IG Finance Advisory Committee Notes

#### **- FY25 Network Projections**

Total FY26 core program revenues for all two schools are projected to be \$7,675,097 while core program expenses are projected to be (\$9,150,974). After extraordinary items are included, the combined year-end core program surplus is projected to be (\$756,607). A detailed budget-to-actual analysis is included within each organization's Monthly Financial Report.

### Board Action Items

- 1) Continue discussions related to the need to ramp up philanthropic support.
- 2) Continue to develop and plan a CMO structure for the two IG schools.



## Financial Report – March 2026

### **FY26 Projection**

Total FY26 core program revenues for all two schools are projected to be \$7,675,097 while core program expenses are projected to be (\$9,150,974). After extraordinary items are included, the combined year-end core program surplus is projected to be (\$756,607). A detailed budget-to-actual analysis is included within each organization's Monthly Financial Report.

<b>Model Rollup (1)</b>	<b>TIS</b>	<b>NWIS</b>	<b>Total</b>	<b>IGC</b>
<b>FTE ENROLLMENT (2)</b>	219.00	226.00	445.00	
<b>REVENUE</b>				
State Foundation (excl SPED) (3)	\$ 2,028,828	\$ 2,003,704	\$ 4,032,532	\$ -
CCIP Funding (excl Title VI-B)	296,048	169,111	465,159	-
Facilities Funding	212,671	223,267	435,938	-
Levy and Casino	480,369	508,514	988,883	-
Charter School Equity Supplement	108,608	114,154	222,762	-
<b>BASE REVENUE</b>	<b>3,126,524</b>	<b>3,018,751</b>	<b>6,145,274</b>	<b>-</b>
State Foundation SPED	338,982	280,983	619,965	-
Title VI-B	59,350	59,636	118,986	-
Food Fund	101,910	84,698	186,608	-
Interest	184,505	192,341	376,847	-
Other Revenues	133,320	94,096	227,417	641,084
<b>OTHER REVENUE</b>	<b>818,068</b>	<b>711,755</b>	<b>1,529,823</b>	<b>641,084</b>
<b>TOTAL REVENUE</b>	<b>3,944,591</b>	<b>3,730,507</b>	<b>7,675,097</b>	<b>641,084</b>
<b>EXPENSES</b>				
Instruction Staff	\$ (1,893,693)	\$ (2,067,725)	\$ (3,961,417)	\$ -
Admin/Ops Staff	(956,003)	(794,687)	(1,750,690)	(150,311)
Services & Supplies - Instruction	(606,396)	(501,248)	(1,107,644)	-
Services & Supplies - Administration	(622,646)	(570,696)	(1,193,342)	(144,019)
Services & Supplies - Food Services	(129,000)	(119,171)	(248,171)	-
Services & Supplies - Facilities	(477,818)	(317,744)	(795,562)	-
Capital	-	-	-	-
Miscellaneous	(61,971)	(32,177)	(94,148)	(12,787)
<b>TOTAL EXPENSES</b>	<b>(4,747,526)</b>	<b>(4,403,448)</b>	<b>(9,150,974)</b>	<b>(307,117)</b>
<b>CORE PROGRAM SURPLUS/(DEFICIT)</b>	<b>\$ (802,935)</b>	<b>\$ (672,941)</b>	<b>\$ (1,475,877)</b>	<b>\$ 333,967</b>
<b>EXTRAORDINARY REVENUE &amp; EXPENSES</b>				
Rent	(74,842)	(150,000)	(224,842)	-
IGC Base Support	181,637	207,500	389,137	(389,168)
HQ School Funding	-	554,975	554,975	-
<b>SURPLUS/(DEFICIT) after extraordinary</b>	<b>\$ (696,140)</b>	<b>\$ (60,467)</b>	<b>\$ (756,607)</b>	<b>\$ (55,201)</b>
<b>PER STUDENT REVENUES</b>	<b>\$ 18,012</b>	<b>\$ 16,507</b>	<b>\$ 17,247</b>	
<b>PER STUDENT EXPENSES</b>	<b>\$ (21,678)</b>	<b>\$ (19,484)</b>	<b>\$ (20,564)</b>	

Notes

- (1) Projections include FY26 accruals projected to be paid after 06/30/26.
- (2) Projected Enrollment is based on school expected year-end FTE
- (3) Projected state foundation revenue reflects most recent month's FTEs

*The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.*



## Financial Report – March 2026

### Equity Position

The chart below outlines the balance sheet totals based upon current accounting records. All of the information in this financial report is based upon pre-audit estimates using available information as of October 11, 2024. GASB 68 pension liability entries are not included in this Balance Sheet Summary as they are not a legal liability for the School. This information should not be used for official financial analysis or reporting. It is provided solely for the use of the Board and Administration to facilitate future financial planning.

**The Intergenerational Schools  
Balance Sheet Summary  
March 31, 2026**

ASSETS	TIS	NWIS	Total	IGC
<b>Current Assets</b>				
Cash (1)	\$ 3,414,860	\$ 5,711,647	\$ 9,126,507	\$ 1,216,925
Accounts Receivable	554,548	410,009	964,557	7,063
Intranetwork Receivable	136,229	155,625	291,854	-
Other Current Assets	-	-	-	(184)
<b>Total Current Assets</b>	<b>4,105,637</b>	<b>6,277,281</b>	<b>10,382,918</b>	<b>1,223,804</b>
<b>Non-Current Assets</b>				
Capital Assets, net	1,405,560	20,377	1,425,937	-
Other Non-Current Assets	-	-	-	-
<b>Total Non-Current Assets</b>	<b>1,405,560</b>	<b>20,377</b>	<b>1,425,937</b>	<b>-</b>
<b>TOTAL ASSETS</b>	<b>\$ 5,511,197</b>	<b>\$ 6,297,658</b>	<b>\$ 11,808,855</b>	<b>\$ 1,223,804</b>
<b>LIABILITIES</b>				
<b>Current Liabilities</b>				
Accounts Payable	173,007	151,093	\$ 324,100	190,793
IGC Base Support	-	-	-	291,854
Wages and Benefits Payable (2)	350,125	279,682	629,807	-
Other Current Liabilities	-	-	-	25,316
<b>Total Current Liabilities</b>	<b>523,132</b>	<b>430,775</b>	<b>953,907</b>	<b>507,963</b>
<b>Non-Current Liabilities</b>				
Loan Payable	37,715	-	37,715	-
Capital Lease Payable	886,650	-	886,650	-
<b>Total Non-Current Liabilities</b>	<b>924,365</b>	<b>-</b>	<b>924,365</b>	<b>-</b>
<b>TOTAL LIABILITIES</b>	<b>\$ 1,447,497</b>	<b>\$ 430,775</b>	<b>\$ 1,878,272</b>	<b>\$ 507,963</b>
<b>NET EQUITY</b>				
<b>Net Assets (3)</b>				
Temp. Restricted - Capital	481,195	20,377	501,572	-
Other Restricted	20,216	23,181	43,397	(464)
Unrestricted Net Assets	3,562,289	5,823,415	9,385,704	1,007,695
<b>TOTAL NET ASSETS (4)</b>	<b>4,063,700</b>	<b>5,866,883</b>	<b>9,930,673</b>	<b>715,842</b>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$ 5,511,197</b>	<b>\$ 6,297,658</b>	<b>\$ 11,808,945</b>	<b>\$ 1,223,805</b>

Notes

- (1) Cash balances are based upon reconciled bank statements.
- (2) Wage and Benefits Obligations include stretch pay for staff and payroll tax liabilities.
- (3) Net Assets do not include GASB 68 pension liabilities since they are not a legal responsibility of the School.
- (4) Total Net Assets are preliminary estimates based upon pre-audit financial information.

*The information in this report is based upon pre-audit accounting to facilitate ongoing financial management and planning.*

# Coversheet

## 2026-2027 Schools Budgets

**Section:** VI. Finance  
**Item:** B. 2026-2027 Schools Budgets  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** IG Network FY27 Budget Presentation FY26 Projection FY27 Budget.pdf

The Intergenerational Schools Network

FY27 Budget and Projection

	FY26				FY27			
SCHOOL	TIS	NWIS	IGC	TOTAL	TIS	NWIS	IGC	TOTAL
<b>STUDENT ENROLLMENT (FTE)</b>	<b>223.00</b>	<b>225.00</b>	<b>-</b>	<b>448.00</b>	<b>232.00</b>	<b>238.00</b>	<b>-</b>	<b>470.00</b>
<b>REVENUE</b>								
State Foundation (excl SPED)	\$ 2,028,828	\$ 2,003,704	\$ -	\$ 4,032,532	\$ 2,131,816	\$ 2,140,669	\$ -	\$ 4,272,485
CCIP Funding (excl Title VI-B)	296,048	169,111	-	465,159	311,076	178,882	-	489,958
Facilities Funding	212,671	223,267	-	435,938	221,254	236,167	-	457,421
Levy and Casino	480,369	508,514	-	988,883	-	537,895	-	537,895
Casino	-	-	-	-	-	-	-	-
Charter School Equity Supplement	108,608	114,154	-	222,762	114,121	120,750	-	234,871
<b>BASE REVENUE</b>	<b>\$ 3,126,524</b>	<b>\$ 3,018,750</b>	<b>\$ -</b>	<b>\$ 6,145,274</b>	<b>\$ 2,778,267</b>	<b>\$ 3,214,362</b>	<b>\$ -</b>	<b>\$ 5,992,629</b>
State Foundation SPED	\$ 338,982	\$ 280,983	\$ -	\$ 619,965	\$ 356,190	\$ 300,190	\$ -	\$ 656,380
Title VI-B	59,350	59,636	-	118,986	61,745	63,082	-	124,827
Food Fund	101,910	84,698	-	186,608	107,083	89,592	-	196,675
Interest	133,320	192,341	-	325,661	124,831	203,454	-	328,285
Other Revenues	184,505	94,096	620,500	899,101	191,951	99,533	585,000	876,484
<b>OTHER REVENUE</b>	<b>\$ 818,067</b>	<b>\$ 711,754</b>	<b>\$ 620,500</b>	<b>\$ 2,150,321</b>	<b>\$ 841,800</b>	<b>\$ 755,850</b>	<b>\$ 585,000</b>	<b>\$ 2,182,650</b>
<b>TOTAL REVENUE</b>	<b>\$ 3,944,591</b>	<b>\$ 3,730,505</b>	<b>\$ 620,500</b>	<b>\$ 8,295,596</b>	<b>\$ 3,620,067</b>	<b>\$ 3,970,212</b>	<b>\$ 585,000</b>	<b>\$ 8,175,279</b>
<b>EXPENSES</b>								
Instruction Staff	\$ (1,893,693)	\$ (2,067,725)	\$ -	\$ (3,961,418)	\$ (2,075,329)	\$ (2,334,453)	\$ -	\$ (4,409,781)
Admin/Ops Staff	(956,003)	(794,687)	(164,199)	(1,914,889)	(1,018,079)	(907,098)	(168,144)	(2,093,320)
Services & Supplies - Instruction	(606,396)	(502,197)	-	(1,108,593)	(547,325)	(491,375)	-	(1,038,700)
Services & Supplies - Administration	(622,646)	(570,696)	(140,291)	(1,333,633)	(521,115)	(509,415)	(125,450)	(1,155,980)
Services & Supplies - Facilities	(477,818)	(311,921)	-	(789,739)	(408,000)	(157,500)	-	(565,500)
Services & Supplies - Food Services	(129,000)	(119,000)	-	(248,000)	(129,645)	(122,570)	-	(252,215)
Miscellaneous	(61,971)	(32,177)	(10,986)	(105,133)	(55,460)	(43,800)	(11,186)	(110,446)
<b>TOTAL EXPENSES</b>	<b>\$ (4,747,527)</b>	<b>\$ (4,398,403)</b>	<b>\$ (315,476)</b>	<b>\$ (9,461,406)</b>	<b>\$ (4,754,953)</b>	<b>\$ (4,566,210)</b>	<b>\$ (304,780)</b>	<b>\$ (9,625,943)</b>
<b>CORE PROGRAM SURPLUS/(DEFICIT)</b>	<b>\$ (802,936)</b>	<b>\$ (667,898)</b>	<b>\$ 305,024</b>	<b>\$ (1,165,810)</b>	<b>\$ (1,134,886)</b>	<b>\$ (595,998)</b>	<b>\$ 280,220</b>	<b>\$ (1,450,664)</b>
<b>EXTRAORDINARY REVENUE &amp; EXPENSES</b>								
Rent	\$ (74,842)	\$ (150,000)	\$ -	\$ (224,842)	\$ (74,842)	\$ (150,000)	\$ -	\$ (224,842)
IGC Base Support	181,638	207,500	(389,138)	-	200,000	125,000	(325,000)	-
HQ School Funding	-	554,975	-	554,975	-	685,678	-	685,678
	-	-	-	-	-	-	-	-
<b>SURPLUS/(DEFICIT) - after extraordinary items</b>	<b>\$ (696,140)</b>	<b>\$ (55,423)</b>	<b>\$ (84,114)</b>	<b>\$ (835,677)</b>	<b>\$ (1,009,728)</b>	<b>\$ 64,680</b>	<b>\$ (44,780)</b>	<b>\$ (989,828)</b>
<b>Projected Year-End Cash Reserves</b>	<b>\$ 3,221,690</b>	<b>\$ 5,168,778</b>	<b>\$ 862,327</b>	<b>\$ 9,252,795</b>	<b>\$ 2,211,962</b>	<b>\$ 5,233,458</b>	<b>\$ 817,546</b>	<b>\$ 8,262,967</b>

# Coversheet

## Staffing Update

**Section:** VI. Finance  
**Item:** C. Staffing Update  
**Purpose:** Discuss  
**Submitted by:**  
**Related Material:** Current Staffing, 5.4.2026.pdf

# Current Staffing Core Classes and SpEd 2026-2027 School Year



Intergenerational  
S C H O O L S

May 6, 2026



Intergenerational  
S C H O O L S

# The Intergenerational School – East

## Core Classes

Position	25-26	Status for 26-27	License 26-27
PRIMARY 1	Ful License	Returning	Ful License
PRIMARY 2	Full License	Returning	Full License
PRIMARY 3	Sub Lic BAEd NR	Return Dev to Pri	Full License
PRIMARY 4	Sub Lic BAEd to Dev	Open to NEW	TFA candidate, others
DEVELOPING 1	Ful License	Returning	Full License
DEVELOPING 2	Full License to Pri	Returning Pri to Dev	Expected Full by 6/30
DEVELOPING 3	Full License	Returning	Full License
DEVELOPING 4	Sub BAEd OSU iss	Returning	Expected w/TFA 6/30
REFINING 1/ELA	24 yrs at TIS Lapse	Returning	24 yrs at TIS, Expected
REFINING 2/SCIENCE	Sub License NR	Return App to Ref	Full License
REFINING 3/MATH	Full License	Offered to Returning	Full License
APPLYING 1/MATH	Sub License to Bldg Sub	Accepted NEW	Full License
APPLYING 2/ELA	Full License	Returning	Full License
APPLYING 3/SCIENCE	Full License to Ref Sci	Accepted NEW	Full License

- Open Primary position: interviewed for through TFA and career fair networking.
- Developing Position offered to a current Primary teacher with a teaching degree, and contingent on obtaining a full license before June 30.
- Current Refining Math teacher may be moving. is returning for the new school year.

# The Intergenerational School – East Special Education

Position	Status	License
Intervention Specialist 1 Part Time	Returning	Full License
Intervention Specialist 2	Returning	Full License
Intervention Specialist 3	Offer Out	Full License Expected (TFA)

- Two intervention specialists have signed (one is part-time), and we have just interviewed a person through TFA that we plan to offer.

# Near West Intergenerational School: Core Classes

Position	Status	License
PRIMARY 1	Returning	Sub License
PRIMARY 2	Returning	Full Licensure
PRIMARY 3	Returning	Full Licensure
PRIMARY 4	Returning	Full Licensure
PRIMARY 5	Open	
DEVELOPING 1	Returning	Full Licensure
DEVELOPING 2	Returning	Full Licensure
DEVELOPING 3	Returning	Full Licensure
REFINING 1/ELA	Returning	Full Licensure
REFINING 2/SCIENCE	Returning	Full Licensure
REFINING 3/MATH	Returning	Full Licensure
APPLYING 1/MATH	Returning	Full Licensure
APPLYING 2/ELA	Returning	Full Licensure
APPLYING /SCIENCE	Returning	Full Licensure

- We expect to have one opening for the primary cluster and we are already in the interview process.

# Near West Intergenerational School: Special Education

Position	Status	License
Intervention Specialist 1	Returning	Full Licensure
Intervention Specialist 2	Returning	Full Licensure
Intervention Specialist 3	Returning	Full Licensure

# Coversheet

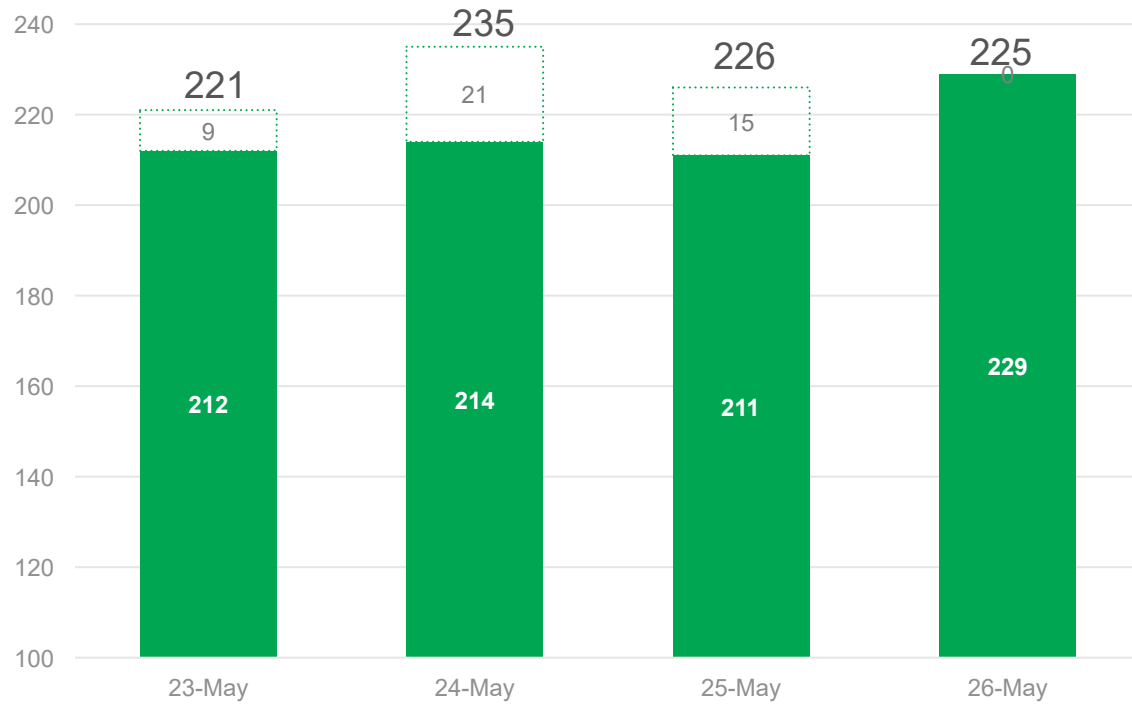
## Update on Enrollment

**Section:** VI. Finance  
**Item:** D. Update on Enrollment  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** May 2026 Dashboard 2.pptx

# May Enrollment Dashboard

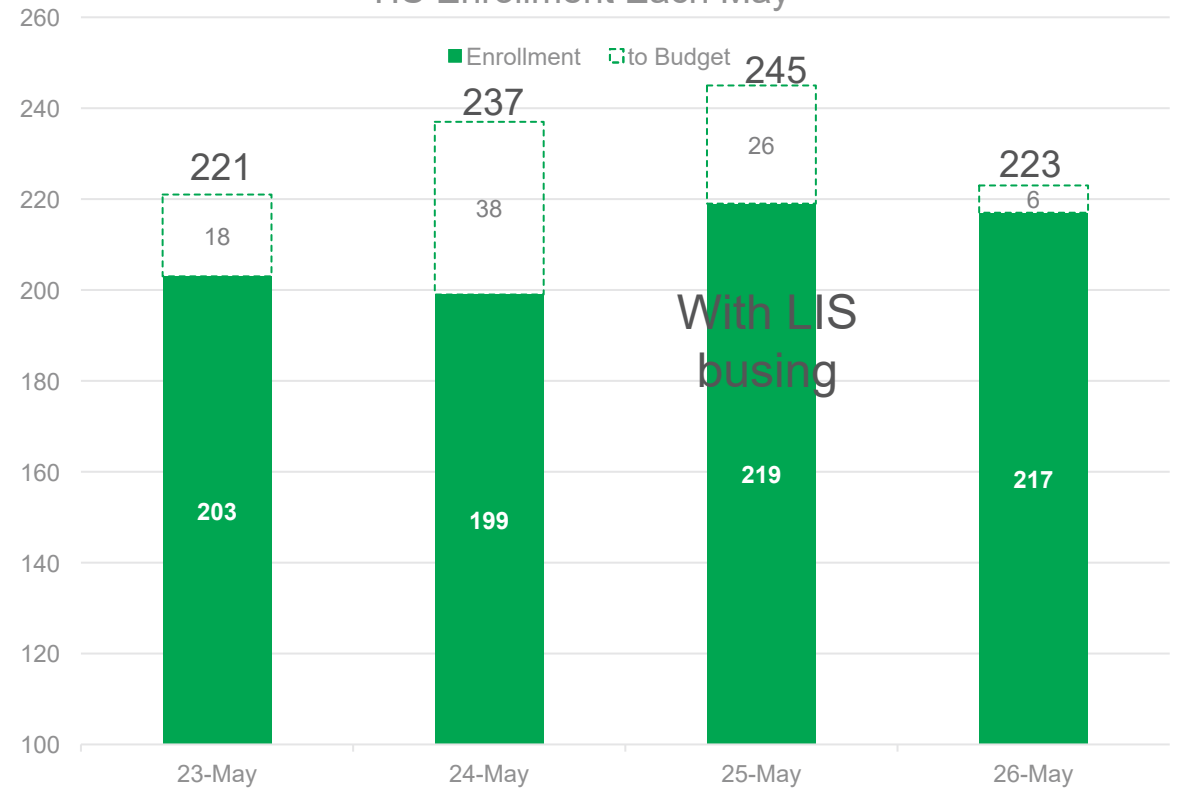
Near West Enrollment Each May

■ Enrollment □ to Budget



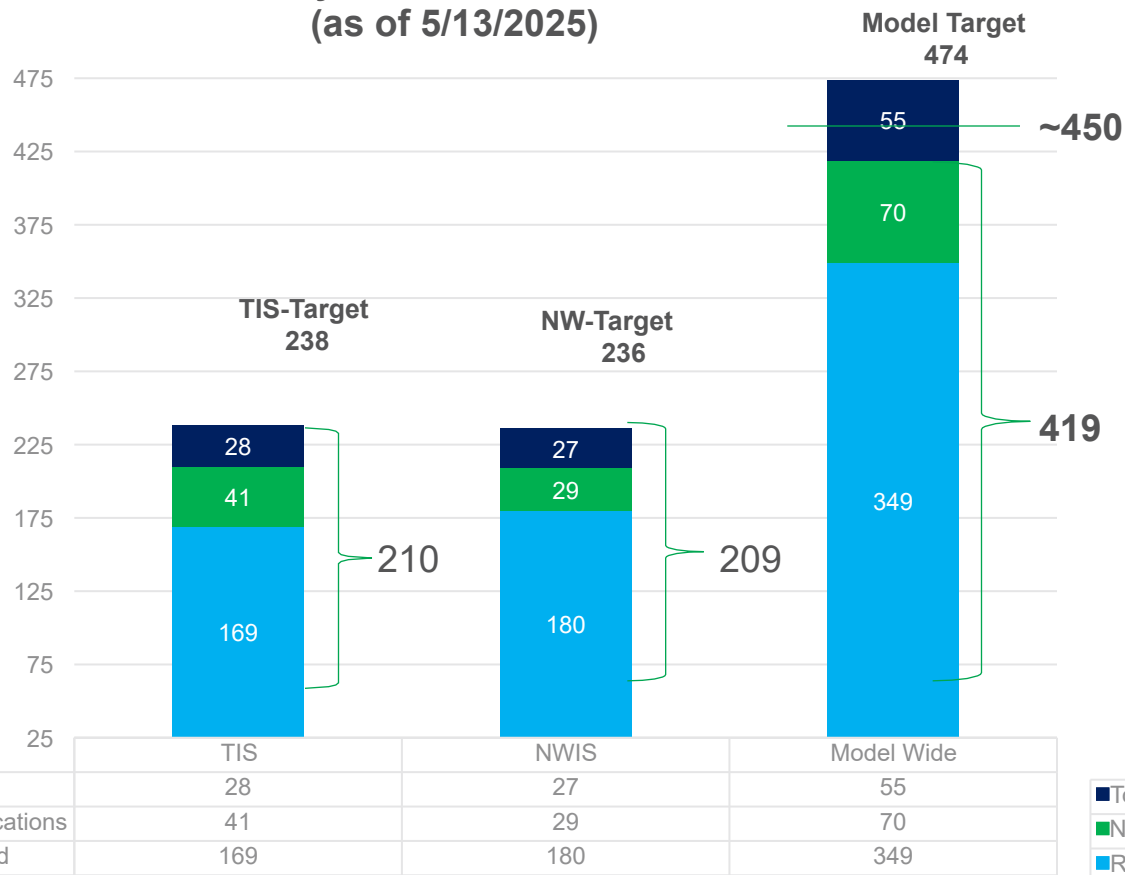
TIS Enrollment Each May

■ Enrollment □ to Budget

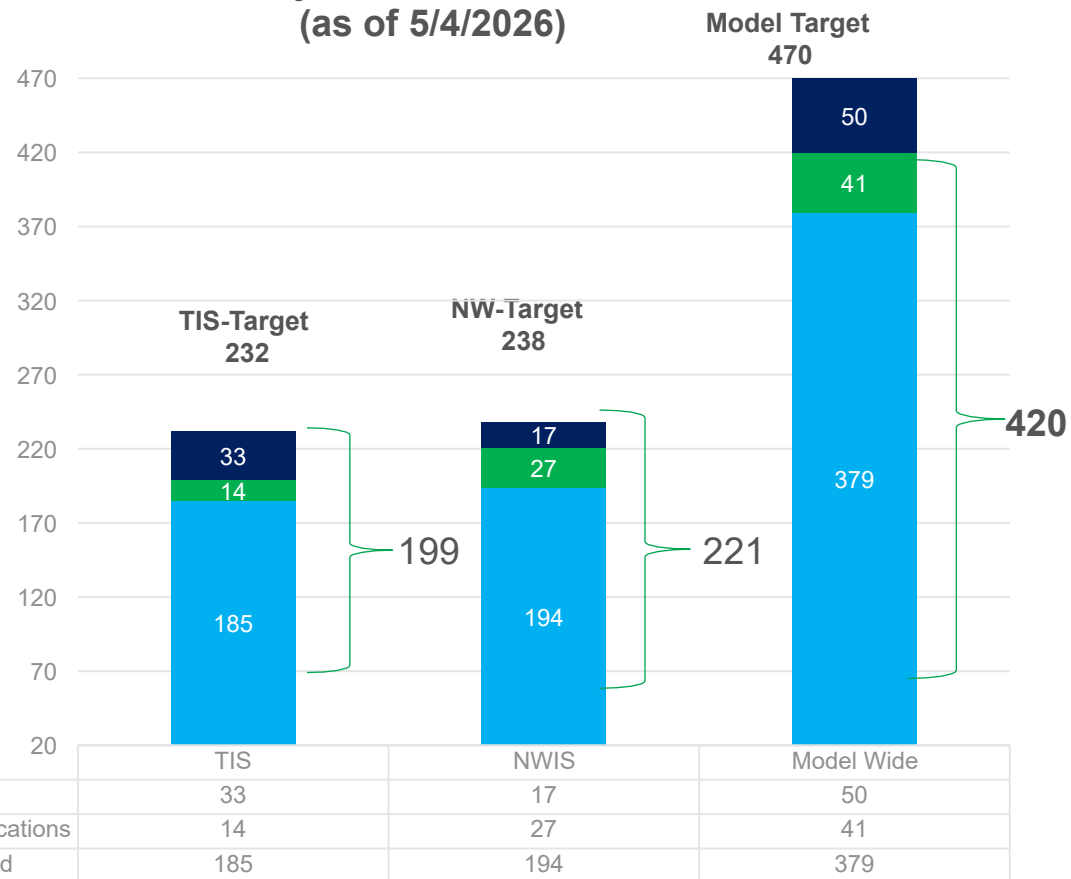


# Next Year's Enrollment Dashboard

May 25/26 Enrollment  
(as of 5/13/2025)



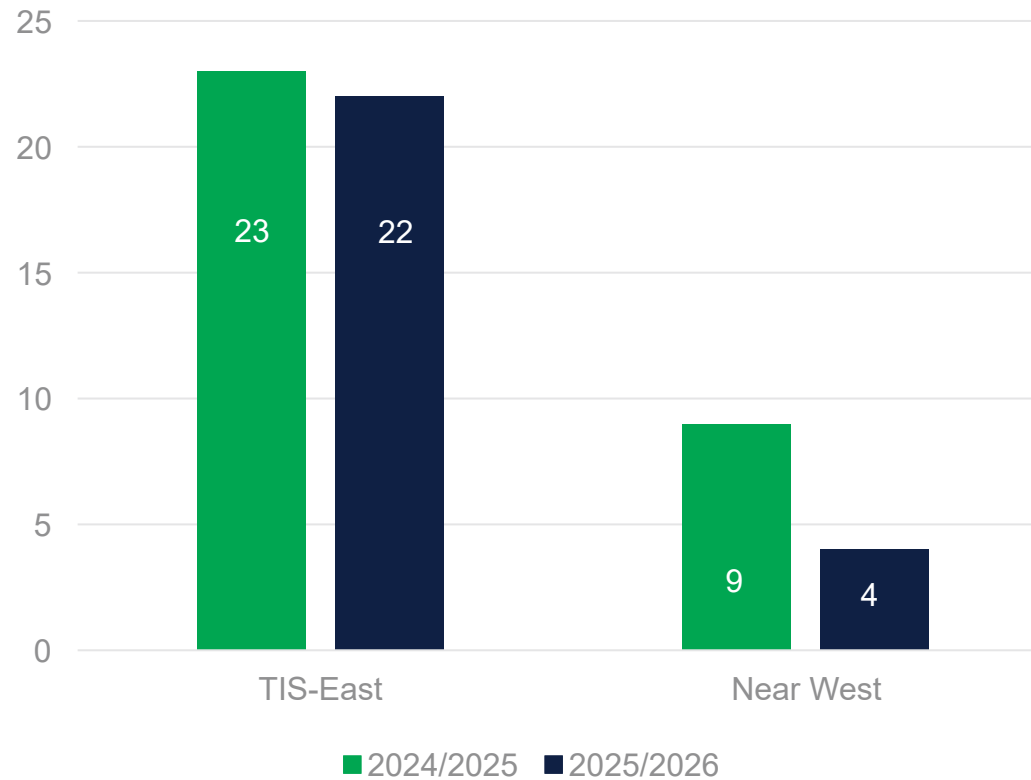
May 26/27 Enrollment  
(as of 5/4/2026)



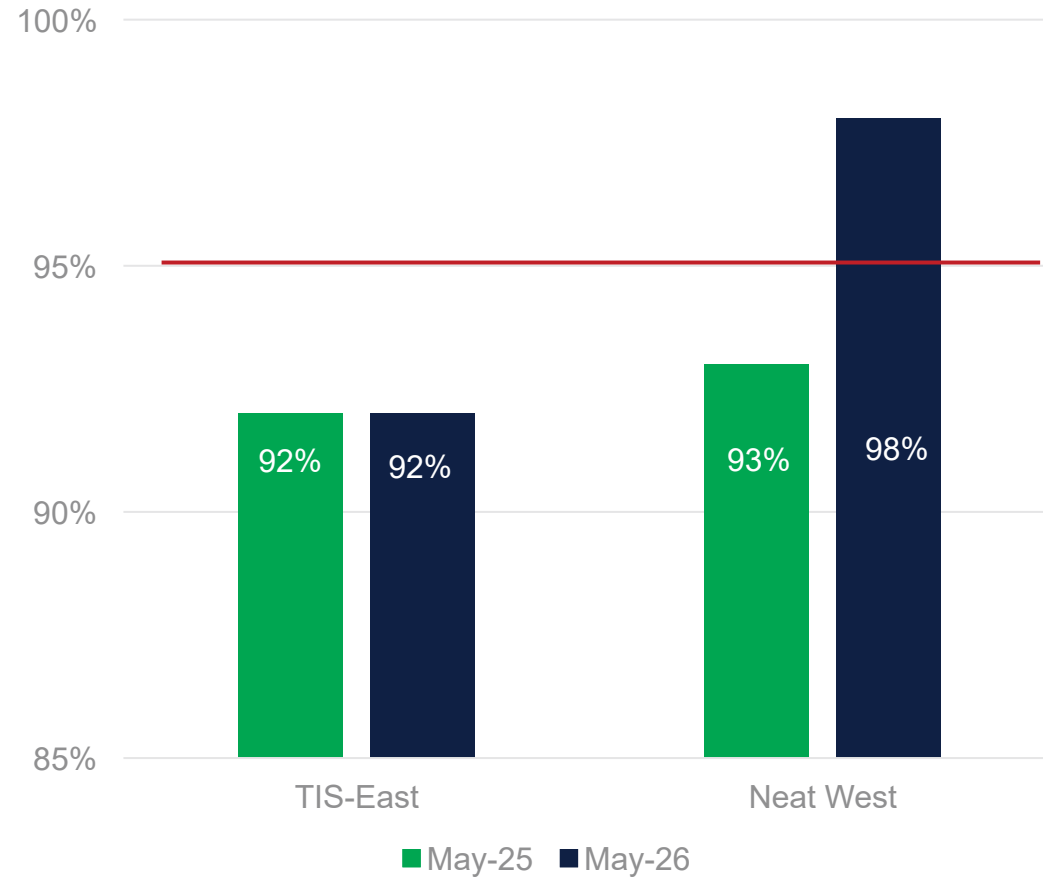
TIS gained ~10 to ~220 (-18) NW gained ~21 to ~230 (-6)

# Year-to-Date Withdrawals

This does not take into account “no-shows.”

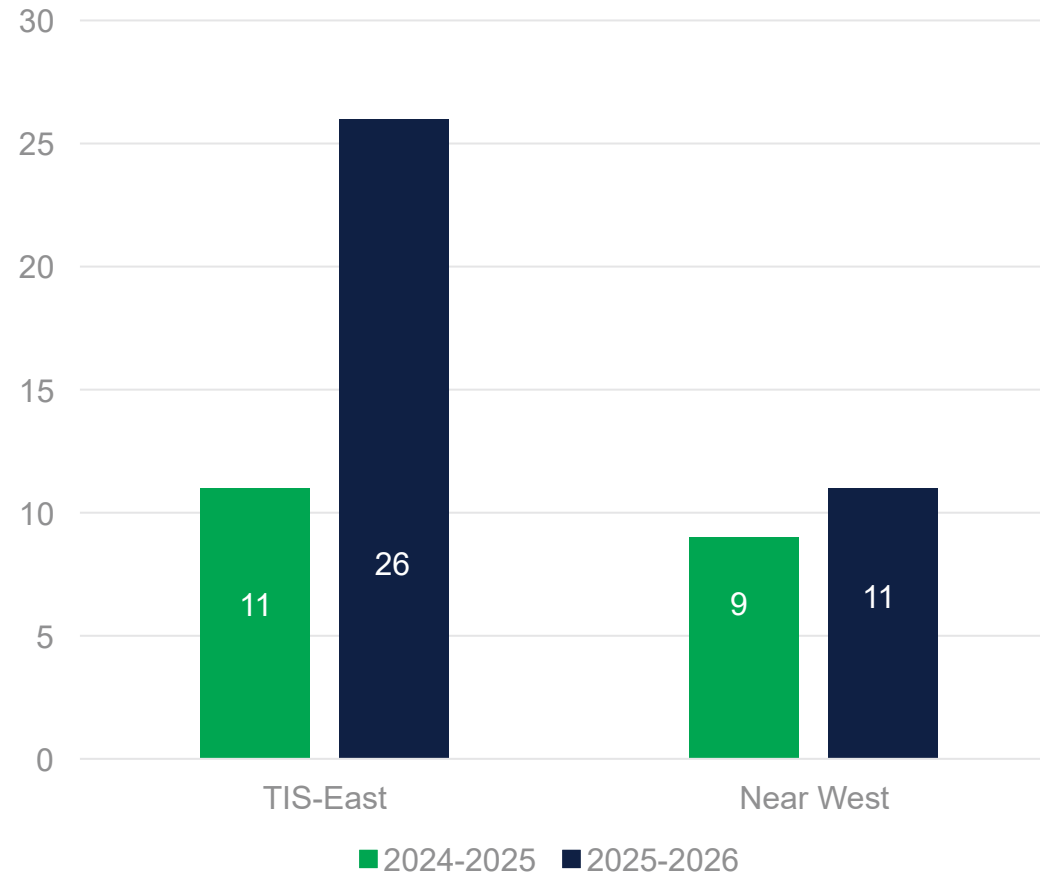


# In-Year Student Retention May 25' vs. May 26'

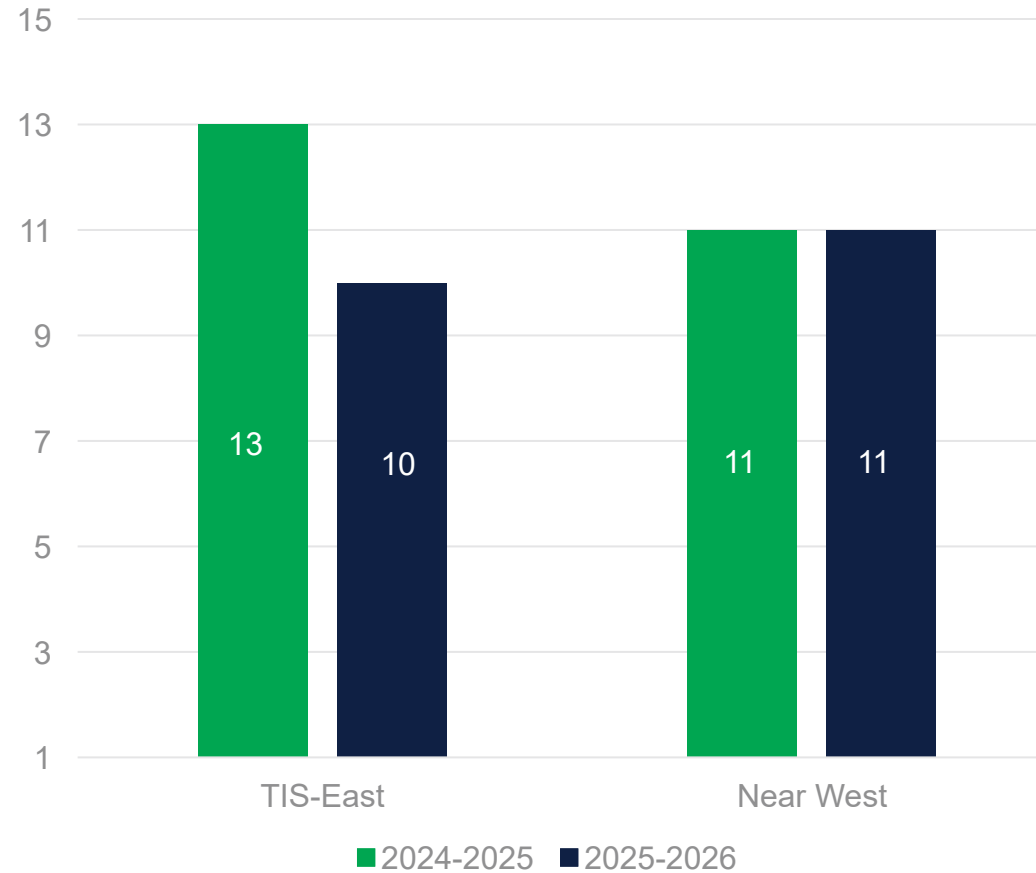


# Students Enrolled Within The Year

**\* Does Include Withdrawals\***

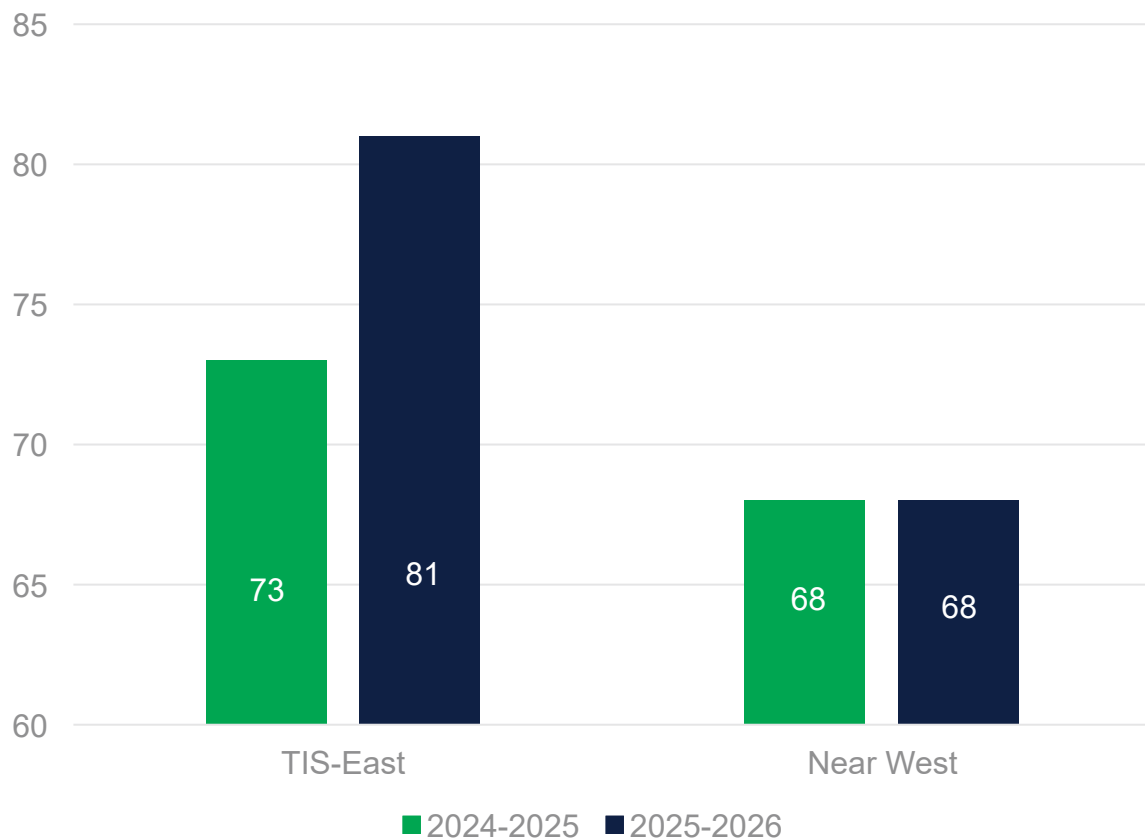


# Waitlisted/Closed Cluster 2025-2026 School Year

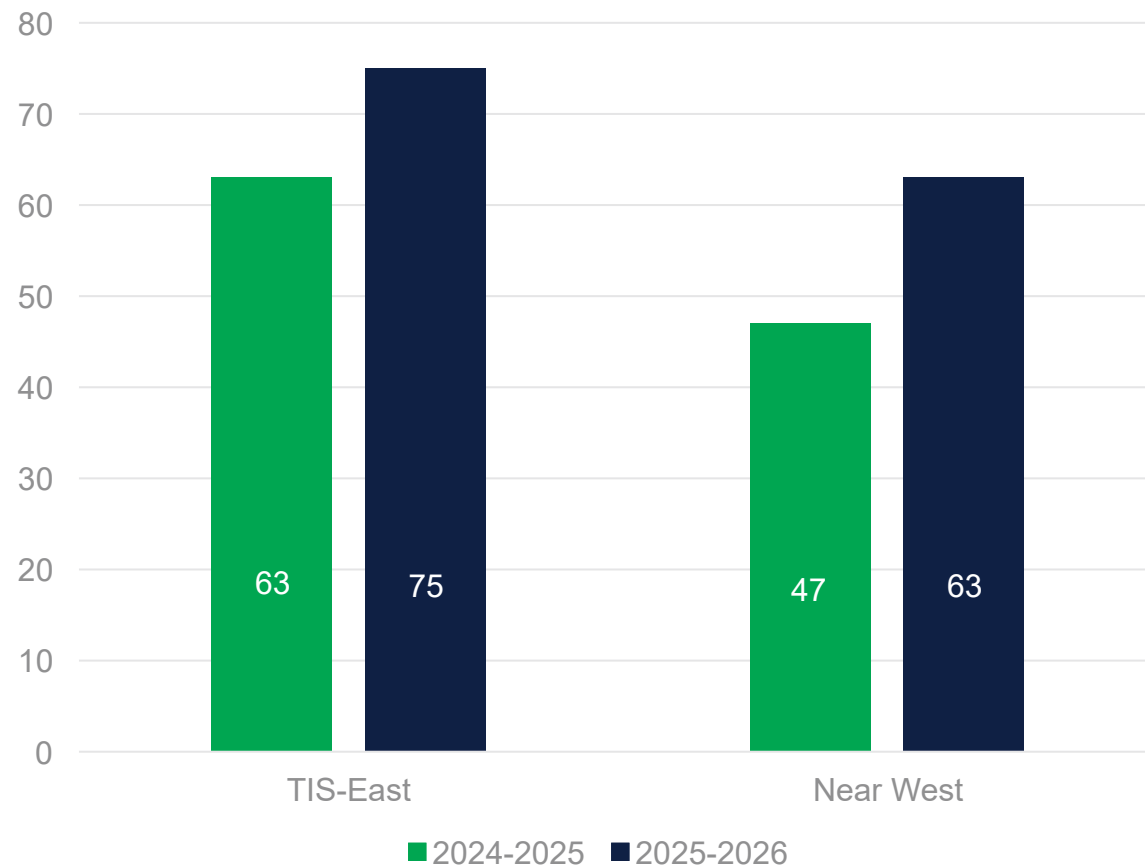


# Ebb & Flow of Enrollment Throughout the Year

Number of NEWLY enrolled students BEFORE the start of school (includes withdrawals & no shows)

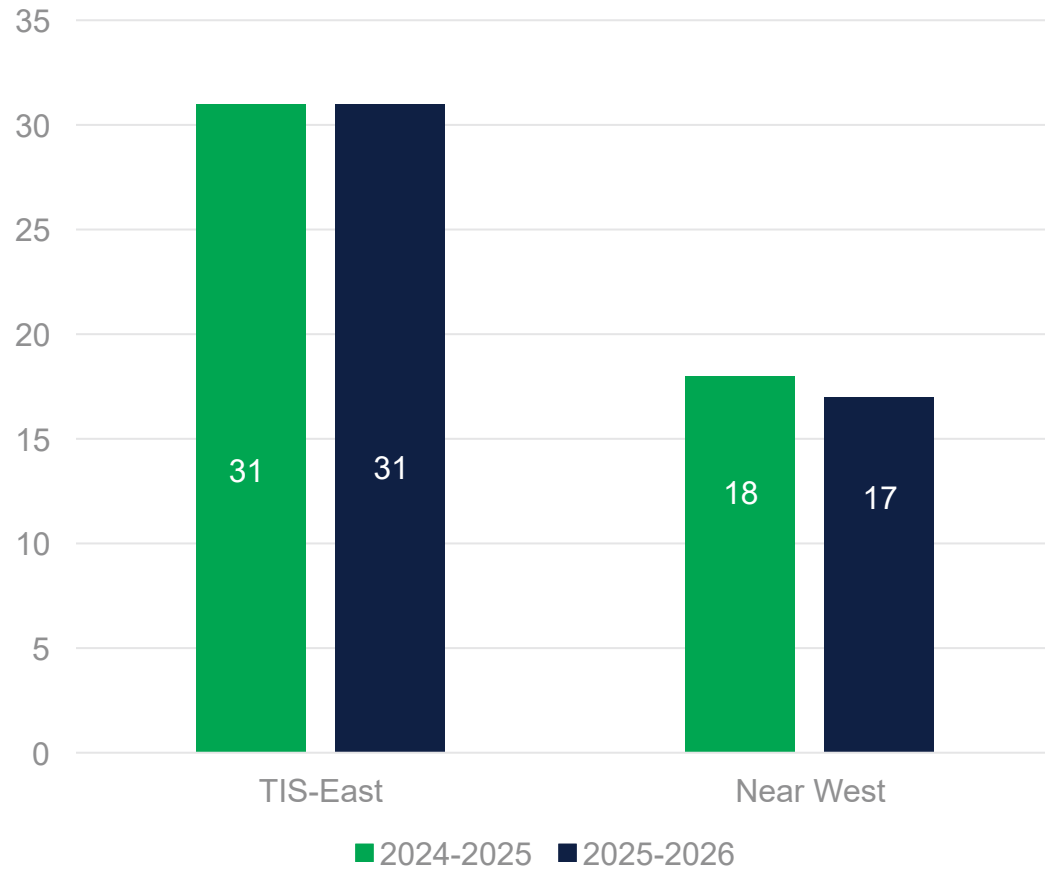


Number of NEWLY enrolled students from early, summer & school year enrollment

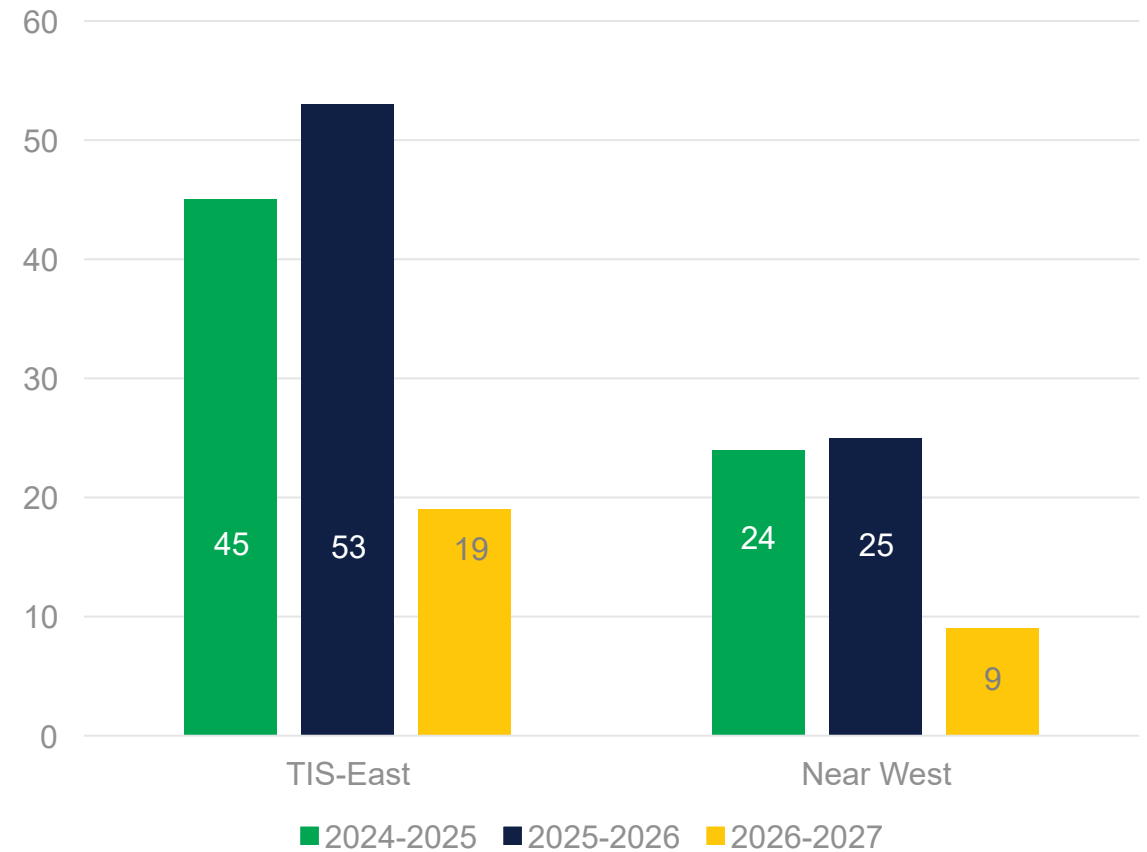


# Ebb & Flow of Enrollment Throughout the Year

Number of SUMMER losses (includes withdrawals, no shows, and non-returning)



Currently enrolled students who indicated they were not returning, were no shows/withdrew



# Recruitment Events/Tours Completed

## The Intergenerational School

- 14 Tours
- 7 Events

## Child Care Center/Preschool Visits

- 12

## Additional Recruitment

- Direct Mailings
- Currently running Meta Campaign
- Digital ads running at area Marc's & Save-A-Lot

## Near West Intergenerational School

- 27 Tours
- 3 Events

## Community Meetings

- Quarterly East End Neighborhood House Community Meeting
- Quarterly Woodland Community Meetings

# Recruitment Events

## City Wide Events

- Kid's First Resource Fair
- Ohio City Kids' Fest
- PRIDE Parade
- Parade the Circle
- Rock the Block
- Harvard Community Cultural Festival

## Summer Canvassing

- Starting in June by the summer interns
- Done within a 5-mile radius of each school.

## Promotional Materials

- Will continue to distribute and display our materials in local stores, businesses, and public spaces where permitted.

## Personal Phone Calls

- The interns will follow up on leads that come through our website, city events, or tours of the schools.

# Coversheet

## Proposed Shared Position of Director of Instruction & Student Experience

<b>Section:</b>	VII. Education
<b>Item:</b>	B. Proposed Shared Position of Director of Instruction & Student Experience
<b>Purpose:</b>	Discuss
<b>Submitted by:</b>	
<b>Related Material:</b>	New Shared Position Director of Instruction and Student Experience.pdf

## Proposal for New Position

### This year's budget (25-26) included

#### Model-wide:

\$45,000 **Foley**-exec coach for Principals and CEO for school improvement plans

\$22,000 **Fritzgerald**-Universal Design for Learning (UDL) training for leaders

\$5,000 + \$3,000 **Lisa Vahey**-Ed coach for CEO, Responsive Classroom training for staff

\$7,500 **Kristal Funk**-Plan and execute Sept All Staff PD Day, and math PD

\$4,000 **Blake Gilliam**-Justice and Belonging training

\$4,500 **CPI/Red Cross**

**\$86,500 (\$43,250 each school)**

#### TIS Only

\$15,000 NPG coaching for Aziz, Jen on instructional coaching systems for teachers

\$10,000 TFA for 2 TFA corps member teachers

\$15,000 TFA used to fund a day of work for a PT employee going from 4 to 5 days FT

\$23,000 Responsive Classroom training—used to fund an additional aide at TIS

**\$63,000 (\$106,250 total for TIS)**

#### NW Only

\$10,000 Ignite Ed executive coaching for Principal

\$3,000 tuition reimbursement for teacher licensure

\$1,000 Responsive Classroom training

\$15,000 for Kate Foley NW—specific on TBT help, decided not to

\$15,000 NPG for coaching Katie and April on instructional coaching systems for teachers, decided not to

\$9,000 Responsive Classroom Training, did not use

**\$53,000 (\$96,250 total for NW)**

**Approximately \$202,500 or approx \$101,250 each school was budgeted this year**

These model-wide functions from the Org Chart are currently being done by CEO, Principals, or not being done at all:

At one point we hired a contractor, Mel Barrett, to do these functions remotely but she got a full-time AP job within the first couple weeks and we never filled the role afterwards.

- Lead state educational reporting and deadlines (including all state surveys, One Plan, CCIP, TIDE, testing, RIMPS, KRA, Dyslexia, ELL, Reading Improvement Plans, SpEd data audits, etc.)
- Interpret state mandates, new rules and requirements and provide guidance to leadership and staff to complete (trainings, submissions, etc.)
- Support OPES and OTES set up and processes, as needed
- Support school-based Curriculum Specialists with regular meetings for model alignment, sharing of resources, and collaboration
- Leverage the stipended model-wide lead and lab teachers
- Bring curricular expertise and supports for school-based implementation and evaluation (incl data review)
- Assist with Report Card changes for mastery-based learning
- Design robust Teacher PD for model, individualized, accessible & user friendly, curriculums to be scaffolded, PLC's

## 26-27 proposed PD Budgets

### Model-wide:

~~\$45,000 Foley~~ exec coach for Principals and CEO for school improvement plans  
 \$22,000 ~~Fritzgerald~~-Universal Design for Learning (UDL) training for leaders  
 \$5,000 + \$3,000 ~~Lisa Vahey~~-Ed coach for CEO, Responsive Classroom training for staff  
~~\$7,500 Kristal Funk~~ Plan and execute Sept All Staff PD Day, and math PD  
 \$4,000 ~~\$10,000 Blake Gilliam~~-Justice and Belonging training  
 \$4,500 ~~CPI/Red Cross~~  
**\$44,500 (\$22,250 each school)                      - \$42,000**

### TIS Only

\$15,000 NPG coaching for Aziz, Jen on instructional coaching systems for teachers  
 \$10,000 ~~\$15,000 TFA~~ for 3 TFA corps member teachers  
~~\$15,000 TFA~~ used to fund another day of work for a part-time employee going from 4 to 5 days  
 \$10,000 Responsive Classroom training—used to fund an additional aide, TIS  
**\$40,000                      - \$23,000                      (\$62,250 TIS total                      -44,000 less)**

### NW Only

\$10,000 Ignite Ed executive coaching for Principal  
 \$3,000 tuition reimbursement for teacher licensure  
~~\$1,000~~ \$10,000 Responsive Classroom training  
 \$15,000 for Kate Foley NW-specific on TBT help  
 \$15,000 NPG for coaching Katie and April on instructional coaching systems for teachers  
 \$9,000 Responsive Classroom Training  
**\$23,000                      -30,000                      (\$45,250 NW total                      -51,000 less)**

Approximately \$107,500 total **(-95,000 less in total)\***

\*Use this for salary and benefits for new in-house position.

## Proposed Position Description

### Director of Instruction & Student Experience (working title)

#### Position Summary

The Instructional & Student Experience Specialist serves as a bridge across both Intergenerational School campuses, connecting instructional systems and resources, coaching and staff development practices, student experience initiatives, and state compliance systems to ensure coherence, consistency, and impact. This role advances a network-wide approach to instructional excellence, educator development, student belonging, and regulatory compliance while honoring the unique identity of each school.

This is a non-supervisory role that works through collaboration, influence, and systems leadership to strengthen alignment and improve outcomes and culture across campuses. The position is shared and reports to the CEO. This is a full-time year-round position.

#### Key Responsibilities

##### Instructional Systems Alignment and Improvement 50%

- Using the Educational Plan, Vision for Education at the IG's, and School Improvement Plans as foundational documents, communicate and support a shared vision for high-quality instruction across both schools.
- Identify gaps and inconsistencies in educational practices across campuses and streamline systems
- Facilitate alignment of curricular and instructional resources, assessments, data protocols and practices, and report card enhancements for mastery-based learning across the model.
- Partner with Curriculum Specialists/Instructional Coaches to strengthen instruction through co-planning, observation and feedback, data reflection, co-teaching, and demonstration teaching wherever needed to ensure all staff are participating in coaching cycles.
- Help to build and organize teacher resources that can be shared across schools and create structures for sharing best practices between them.
- Leverage stipended model-wide lead/lab teachers to share and implement best practices across the model. Identify needs and facilitate connections to lead/lab teachers for specific guidance.

- Working with Principals, design, source, manage, and evaluate high-quality professional development that is model aligned, differentiated to current needs, and practical. Support Principals in implementation and follow up plans after teachers receive PD.
  - Help to provide feedback and instructional support to community/project-based learning experiences within Intergenerational programs.
  - Support leadership team in using and analyzing data to inform decisions and improve outcomes
- 

### **Student Belonging & Culture 25%**

- Design and implement a network-wide framework for student belonging.
  - Work with Assistant Principals and Principals to align behavior systems with Responsive Classroom and trauma-informed practices. Help ensure that common language is used and training and resources are received when needed.
  - Support initiatives that elevate student voice, identity, and engagement as part of the IG mission of “spirited citizens.”
  - Lead or support cross-campus student leadership and engagement opportunities
- 

### **Compliance, Evaluation & State Reporting 25%**

- Lead state educational reporting and compliance processes, including tracking required submissions and deadlines (e.g., ODEW One Plan, CCIP, TIDE/state testing, RIMPS, KRAs, Dyslexia and ELL screening, Reading Improvement Plans). Ensure accurate and timely completion of required reporting in partnership with Assistant Principals and other staff.
- Interpret state mandates, policy updates, and new requirements, providing guidance and training to leadership and staff
- Support OPES and OTES setup, implementation, and ongoing monitoring as needed (may include OTES certification and assisting Principals in evaluations)
- Ensure compliance with Preventative Services, Restraint and Seclusion, and other required annual surveys
- Oversee Resident Educator Program compliance, documentation, and reporting

- With Principals, help to ensure school Special Education teams are operating in compliance, collecting appropriate consent forms, tracking due dates, etc. Occasionally conduct internal audits to prepare for outside audits
  - Support in communicating audit responses, sponsor applications, compliance reviews, and educational corrective action planning with leadership teams
  - Help to gather and interpret key educational datapoints and information on educational initiatives for grant writing and advancement materials
- 

## Qualifications

### Required

- Master's degree in education, Educational Leadership, Curriculum & Instruction, or related field
  - Valid Ohio administrative or teaching license (or eligibility for licensure)
  - Minimum of 5–8 years of experience in education, including classroom teaching and instructional leadership responsibilities
  - Demonstrated experience with curriculum development, instructional coaching, and/or teacher professional development
  - Strong working knowledge of Ohio state reporting requirements and compliance systems (e.g., ODEW reporting, state testing systems, etc.)
  - Experience supporting data-driven instruction, PLCs/TBTs, and continuous improvement systems
  - Proven ability to design and facilitate high-quality professional learning for adults
  - Experience supporting or leading instructional systems across multiple grade levels, teams, or campuses
  - Strong organizational skills with the ability to manage multiple priorities and deadlines simultaneously
  - Excellent written and verbal communication skills with the ability to work across diverse stakeholder groups
- 

### Preferred

- Experience in a network, charter, or multi-site school setting

- Experience with mastery-based or competency-based learning systems
  - Prior leadership in OTES/OPES implementation or teacher evaluation systems, OTES certification is a plus
  - Experience with project-based learning (PBL) or community-based instructional models
  - Experience supporting school culture systems and student belonging initiatives
  - Experience working directly with state audits, compliance reviews, or corrective action plans
  - Coaching certification or formal training in instructional coaching frameworks
  - Experience designing and delivering adult learning systems at scale
- 

### **Core Competencies (Highly Important for Success in This Role)**

- Systems thinking and ability to connect instruction, culture, and compliance
- Strong instructional judgment and content/grade-level credibility
- Ability to influence without formal supervisory authority
- Comfort working across ambiguity and building systems from the ground up
- High attention to detail (especially in compliance and reporting work)
- Collaborative leadership style with strong relational skills
- Data literacy and ability to translate data into actionable instructional improvements

# Coversheet

## IGCle Task Force Update

**Section:** IX. Task Force for Intergenerational Cleveland-School Service Agreement  
& Structure

**Item:** A. IGCle Task Force Update

**Purpose:** Discuss

**Submitted by:**

**Related Material:** IGCle Board Presentation 5-26.pdf

# Intergenerational Cleveland (IGCle) School Service Agreement

## Overview of the Original IGCle Agreement

- Fundraising & Support Agreements between School(s) and IGCle began July 1, 2017
  - Initial term to June 30, 2020, with yearly automatic renewals
- Provided fundraising, advancement, and advocacy to the Schools (and charge for Dev Dir which has not been done starting in 2018 decided by FIGS Board).
- Philanthropy allocation formula paid varied amounts to each school, covering only costs of facilities: rent, maintenance, capital expense but NOT Common Area Maintenance (CAM) at TIS.
  - Very little state facilities funding at the time
  - State facility funding is now close to \$1,000 per student ~\$220,000 per school
- If Schools incur unexpected expense over \$5,000, they may seek additional support.
- School Boards also can waive IGCle support if their financial reserves are stable.

# Purpose of the IGClc Task Force

- Review agreement and update to:
  - Reflect current realities of facilities funding and philanthropy
  - improve operational efficiency for the network (shared contracts and bill backs, shared staff)
  - better position the organization for fundraising
- Focus intentionally limited to operational, financial, and governance structure, with no alteration to the educational components of the Schools.
- Goal: Improve organizational efficiencies and support network growth in alignment with the School Boards' Strategic Plan by revising and improving the existing IGClc agreement and organizational structure for Board approval and implementation for FY27 with July 1, 2026 launch

# Members of the Task Force

## Board Members

- Stacy Miller-Board Chair
- Danielle Clark-Board Vice Chair
- Lynn Carpenter-Finance Advisory Chair
- Richaun Bunton-Education Advisory Chair
- Bob Nicolay-Governance Chair

## Friends of Intergenerational Board Members

- Cena Hillard-Board Chair

## IG Staff

- Brooke King-CEO
- Amy Cascio-COS
- Sarah Alonso-COO

## Legal Representation

- Tim Clements

## Treasurer

- Celeste Farmer

## Task Force Meetings

- Task force met 7 times since August 2025
  - research other network agreements and structures
  - closer look at our practices across 3 entities and ways to streamline
  - review and revise terms of the agreement
- Tim Clements, our legal counsel, has met with the entire group twice to address questions and revise the current draft Agreement according to recommendations.
- Consulted with Celeste, Treasurer several times through the process
- Additional work on the agreement among Brooke, Amy, Sarah, and Tim has occurred outside of scheduled Task Force meetings.

# Key Changes to the IGCle Agreement

## Centralized Financial Management

- All financial operations, including shared staff payroll and shared vendor contract payments will transition to IGCle to streamline operations and enable greater flexibility to adapt as the model grows.

## Updated Philanthropic Allocations

- Philanthropic funding allocations have been revised to reflect existing School Boards' practices, while providing flexibility to make informed decisions within established guidelines and in alignment with the School Boards' Strategic Plan.

# Proposed IGClE Agreement

5 Year Term begins July 1, 2026 with automatic annual renewals

Move all Shared Staff who are currently split between the school payrolls to IGClE payroll in order to provide the following school services (*no change in WHAT work is done or HOW the work is done*):

- **Safety and facilities** planning and management
- **Human resources** management and support
- **Intergenerational Programming** development, management, and support
- **Technology** administration, management, and support
- **Financial management** and accounting support
- **Policy development**
- **Educational compliance** and technical assistance
- Planning, management, and support of **food services**
- Planning and management of **transportation services**
- **Enrollment** management and support
- **Public relations and marketing**
- **Advocacy and outreach**
- **Grant submissions** and administration
- Record keeping and reporting management and support, including **student management systems**

# Proposed IGClc Agreement

## Personnel and Oversight

- The School Boards and IGClc will be responsible for hiring, evaluating, and managing the Model CEO
- The CEO will serve at the pleasure of the TIS, NWIS, and IGClc Board
- The CEO will be responsible for hiring, evaluating, and managing the following positions, which will now be under the IGClc umbrella:
  - All model-wide Shared Staff
  - School Principals (**The Principals shall remain employees of the Schools**)

# Proposed IGClc Agreement

## Joint Contracts and Services

- All model-wide contracts will be held and managed by IGClc
  - One vendor=One payment (currently vendors receive 2 or 3 checks OR the entities bill each other back)
- Special Education contracts and services will remain with individual Schools (services are student-based according to individual needs).
- Contracts that one school enters into for specific services will not be included.
- Fundraising and public relations remain the responsibility of IGClc
  - Goals and activities will continue to be planned with the School Board.

# Proposed IGClc Agreement

## Budgeting & Payment Structure

- IGClc and the Schools agree on annual budgets
- The IGClc budget will cover services, staff support, joint contacts, and include a 3% contingency line item. This total will equal the service fee estimate which will appear as one line on the School budgets.
- The Schools will pay the Service Fee estimate to IGClc based on each school's proportionate enrollment (FTE) using the estimated enrollment for that year.
- Annual Service Fee estimate is paid directly from the Schools to IGClc monthly
- Joint Service Contracts and payroll are paid directly from IGClc to employees and vendors
- Quarterly reviews are conducted comparing service fee estimates to actual costs and revenues.

# Proposed IGClc Agreement

## Philanthropic and Other Financial Support

- IGClc works with the School Boards to set and review cash reserve targets for each School.
- Each year, the School Boards and IGClc determine how raised funds are to be used.
  - Portions may be held in reserves, added to an endowment, used for capital projects, or distributed to the Schools.
  - Any restricted grants or gifts will pass through directly to the school designated
- Support is distributed **equitably**, not equally, based on:
  - Each School's cash reserve vs. targets
  - Differences in per-pupil funding
  - Unexpected expenses or capital need
- IGClc will track and record all support provided to each School.

# GOVERNANCE & ORGANIZATIONAL STRUCTURE

