



EAST LYCOMING
SCHOOL DISTRICT

SCHOOL BOARD AGENDA



EVERY STUDENT: INSPIRED, ENGAGED, *and* LEARNING Today, For Tomorrow

Superintendent's Report

March 3, 2026

General Information

Lyco CTC Project - Bleachers

At the start of the Lyco CTC project there were unanticipated discussions between engineers regarding steel column placement in the building to properly support the bleachers. Those discussions were resolved and the project started with a 2 week delay. Unfortunately the prolonged cold this winter also caused some additional delays. Although the project is progressing, it is running about 3 weeks behind initial projections. This has no impact on Lyco CTC programming, but it does reduce the time between substantial completion and commencement on June 5. As of this week, the substantial completion date for the bleachers and pressbox is mid-April. A definitive date is still being refined. Still lots of time between that and commencement, but I wanted to bring this to your attention now and let you know we are working to ensure there are no issues on June 5.

Administrator Resignation

Mrs. Cori Cotner - Director of Curriculum and Instruction

I have received and accepted the notice of retirement resignation for Mrs. Cori Cotner, Director of Curriculum and Instruction effective September 11, 2026. I would like to personally thank Mrs. Cotner for being an integral part of the leadership team. Mrs. Cotner brought a level of professionalism and skill to the team that allowed us to implement new curriculum, improve instructional practices, and increase educational opportunities for all students. Because of her work with the team, student achievement is increasing and we are exceeding strategic goals. She will be missed, but I wish her the very best in the next stage of her professional journey.

Business and Financial

Solicitor RFPs

At the request of the Board, the district solicited requests for proposals from solicitors to represent the Board. RFPs were due on February 16. Four were received. My summary letter includes those who submitted along with the proposals. Several firms will be in attendance.

Technology Management Services RFPs

At the request of the Board, RFPs for an interim technology director were solicited from January 16 through February 16. The district received three proposals. Exact monthly costs will vary depending on daily needs in the district, but BLAST IU17 is the least expensive option and can provide the most knowledgeable support for school systems and state testing.

I need to impress upon the board that daily operations without a program director is becoming a challenge. Maintenance technicians are doing their best, but they cannot fully fill the gap created by the absence of a full-time director. Looking forward, state testing begins in mid-April and will be quickly followed by Keystone Exams and AP exams. All of these are on-line. The assessment windows are short and we will not have reaction time to call in outside

service if there is a problem on test days. Approving one of these temporary services will provide some support that is in critical need while the Board continues to discuss options.

Education

Enrollment Trends / Sections

As discussed with the board in January, I will present information at the meeting on enrollment trends, forecasts, elementary sections, and secondary course selections.

Organizational Chart and Salary Information

As requested by the board, Heather and I will upload to your board folder a comprehensive organizational chart and salaries of all district employees. This should be there by Tuesday morning.

Facilities

Ferrell Playground

The final design as presented in February is on the agenda for discussion. When building the final budget in the project sheet there will be estimated costs included for excavation and stone if needed. There is a \$12,000 decrease in the cost of the project as a result of the change in location to the tennis courts that I believe will cover this contingency for stone.

Ferrell Playground Land Lease

On Monday, March 2 the Picture Rocks Borough Council will review and hopefully approve a 30 year lease for the tennis court area to the district for \$1 per year. If approved by the borough, this lease will be on the agenda for your review and approval on March 17. Thirty years was selected as the anticipated life-span of the playground equipment.

Board Policies

Policy 907 School Visitors

Administrative Regulations for implementation of Policy 907 School Visitors are included for your comments. The ARs will ensure that parents and Board members wishing to visit classrooms understand the purpose and process of doing so and provide FERPA and IDEA protections to the district. Upon the recommendation of Attorney Kenyon, clearances will not be required.

Dr. Mark Stamm
Superintendent of Schools

**EAST LYCOMING SCHOOL DISTRICT BOARD OF EDUCATION
 COMMITTEE OF THE WHOLE MEETING
 HHS LIBRARY
 MARCH 3, 2026 @7:00 PM
 ATHLETICS COMMITTEE @6:00 PM**

For the purpose of school building safety and maintaining Board minutes, all visitors attending Board meetings are required to register their attendance on a sign-in sheet that shall be provided for that purpose.

- I. ANNOUNCEMENT OF EXECUTIVE SESSION** **Mr. Dudek**

- II. CALL TO ORDER** **Mr. Dudek**

- III. FLAG SALUTE** **Mr. Dudek**

- IV. VISITORS PRESENTATIONS/PUBLIC COMMENTS** **Mr. Dudek**
 - A. The Chair will entertain public comments on agenda items. **Mr. Dudek**

- V. COMMITTEE OF THE WHOLE**
 - A. Business / Financial Discussion
 - 1. PSBA Unemployment Compensation Insurance **(BF-1)**
 - 2. Proposed 2026/2027 IU #17 General Operations Budget **(BF-2)**
 - 3. Review and discuss RFP - Solicitor **(BF-3)**
 - 4. Review and discuss RFP - Technology Transition Support **(BF-4)**
 - 5. Interim financing for the LycoCTC expansion project
 - 6. Other Business / Financial Items for Future Board Consideration

 - B. Academic Discussion
 - 1. Academic Overview
 - 2. HHS Flex Period Information **(AC-1)**
 - 3. Enrollment Trends Discussion
 - 4. Field Trips:
 - a. 3/11/26 PMEA Region Band Festival (MMI Prep Sd & Hazleton SD) High School Band
 Number of Students: 2 Cost to Students: \$25.00 (Food) Cost to District: Approx. \$773.00
 - b. 3/25/26 Robert M. Sides Pre-K Students
 Number of Students: 40 Cost to Students: \$0.00
 Cost to District: \$0.00 (Pre-K Counts Grant Funded)
 - c. 4/8/26 Lewisburg Children’s Museum Ashkar Grade 1
 Number of Students: 60 Cost to Students: \$0.00 Cost to District: \$0.00 (PTA Funded)
 - d. 5/5/26 Camp Susque Ferrell Grade 2
 Number of Students: 23 Cost to Students: \$0.00 Cost to District: \$0.00 (PTAC Funded)
 - e. 5/8/26 Acacia Club High School Prom Committee
 Number of Students: 9 Cost to Students: \$0.00 Cost to District: \$125.00 (Substitute)
 Remaining costs paid by Class of 2027
 - 3. Other Academic Items for Future Board Consideration

 - C. Athletic Discussion

1. Athletic Committee - Committee Chair - Mr. Ritter
2. Other Athletic Items for Future Board Consideration

D. Facilities Discussion

1. HHS Facility Tour Summary/Ashkar Elementary in March
2. Ferrell Playground **(FA-1)**
3. Other Facility Items for Future Board Consideration

E. Policy Discussion

1. AR (2) Board Policy 907 (School Visitors) **(BP-1)**
2. Other Policy Items for Future Board Consideration

VI. PRESENTATION: District population disparity and Mr. Dudek's proposals for the elimination or restructuring of the three regions that make up the district. **Mr. Dudek**

VII. NEW BUSINESS **Mr. Dudek**

1. New Business is for Board Members to make a motion to have a Board discussion on a proposal that they have for the School District which is not listed on this agenda. The motion must be seconded and recognized by the Chair to move forward for discussion. A vote may be taken to place the proposal on a future meeting agenda. Motions under New Business shall be entered in the meeting minutes.

VIII. AUDIENCE PARTICIPATION:
Questions or comments from residents of the district regarding board discussion topics or other school-related matters.

IX. COMMENTS FROM INDIVIDUAL BOARD MEMBERS: Comments from individual Board Members.

X. EXECUTIVE SESSION AFTER ADJOURNMENT: To convene for an executive session for personnel. **Mr. Dudek**

XI. ADJOURNMENT **Mr. Dudek**

May I have a motion to adjourn this meeting?

Motion:

Second:

Discussion:

Vote: Yes _____ No _____

Time: _____ P.M.



HUGHESVILLE SPARTANS



Athletic Committee

March 3, 2026

6:00PM / HHS Library Conference Room

Attendance: TBA

Sports:

- PIAA Enrollment Numbers for Next Cycle 26-27 & 27-28
- Spring Sports Update – Registration Opened in January
- Winter Sports Summary/Results

Facilities, Technology & Additional Items:

- Update - Arbitrator/BigTeams/rSchoolToday Transition – Athletic Website
- PIAA HB 41 – Private/Public School Postseason Separation
- Sport Additions – Golf Club? Bocce Club? Others?
- Practices/Games on Inclement Weather Days
- Overnight Trips – e.g., Wrestling
- Programs/Coaching Evaluations – PSADA
- Athletic Complex Discussion (e.g., Montgomery Athletic Complex)

From: Heather Burke, Business Manager

Date: February 26, 2026

Topic: PSBA Insurance – BUCS (Better Unemployment Compensation System) Agreement

Cost estimate for the 2026-27 school year: \$10,200-\$11,000

Description:

This agreement is between PSBA Insurance and our school district for unemployment insurance related services. A summary of services includes:

- 1) Claim Services
 - Analyze/record/respond to unemployment compensation claim forms.
 - Audit claimant eligibility and school district liability.
 - Assist in preparing the school district for hearings.
 - Attend hearings with school district personnel.
- 2) Administrative Services
 - Verify accuracy of unemployment compensation billings.
 - Monitor allocation of liability in multiple-employer claims.
- 3) Reports and Informational Services
 - Report claims and charges quarterly.
 - Provide consultation on all unemployment compensation matters.
 - Furnish school district legal counsel with pertinent information if needed for any court proceedings.
- 4) Field Services
 - Consulting services related to avoiding claims and reducing unemployment compensation claims.
 - Participate in meetings and hearings concerning proposed legislation impacting unemployment compensation.

For the current school year, we paid \$10,206.53 and are in the lowest risk rate tier. A formula is used in determining the annual cost for this service. Claims from 2023/24, 2024/25, and the first 3 quarters (July through March) of 2025/26 will be used as part of the formula. Due to minimal claims activity and changes to staffing, we expect to have a similar cost for next school year.



**BETTER UNEMPLOYMENT COMPENSATION SYSTEM COMPREHENSIVE
PROGRAM STANDARD TERMS AND CONDITIONS OF THE
PARTICIPATION AGREEMENT
BETWEEN PSBA INSURANCE AND
EAST LYCOMING SCHOOL DISTRICT**

THIS AGREEMENT is made between PSBA Insurance, a Pennsylvania company with an address of 400 Bent Creek Boulevard, Mechanicsburg, Pennsylvania, 17050, and the East Lycoming School District (hereinafter referred to as the “School Entity”), a public school entity within the State with an address of 349 Cemetery Street, Hughesville, Pennsylvania 17737. By entering into this Agreement, the School Entity joins with other public school entities pursuant to the terms of the Intergovernmental Cooperation Act, 53 Pa.C.S. § 2301 et seq., to participate in the Better Unemployment Compensation System COMPREHENSIVE Program (“BUCS”) and to contract with PSBA Insurance to provide the services stated herein.

RECITALS

WHEREAS, Pennsylvania law authorizes public school entities to enter into agreements for the development of group risk management programs through a variety of devices (see 42 Pa.C.S. § 8564); and

WHEREAS, the Pennsylvania Intergovernmental Cooperation Act provides that two or more governmental entities, including public school entities, may cooperate in the exercise of their powers and responsibilities through joint agreements, (see 53 Pa.C.S. § 2303), including the provision of a group risk management program (see 42 Pa.C.S. § 8564(c)); and

WHEREAS, PSBA Insurance has been established as a vehicle to provide a program for managing unemployment compensation risks and claims and related services for public school entities within the State; and

WHEREAS, the School Entity, having evaluated the Program’s terms, conditions, limitations and exclusions, desires to join with the other public school entities participating in BUCS and to retain PSBA Insurance to operate and manage the Program in accordance with the terms and conditions of this Agreement; and

WHEREAS, PSBA Insurance and the School Entity both desire to set forth their respective obligations and responsibilities.

NOW, THEREFORE, PSBA Insurance and the School Entity, intending to be legally bound hereby, for the mutual benefits, covenants and promises contained herein, and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, agree as follows:

ARTICLE I DEFINITIONS

The following terms, when set forth in this Agreement, shall have the meanings stated in the following definitions unless the context clearly indicates otherwise:

Section 1.1 “Agreement” shall mean this Agreement between PSBA Insurance and the School Entity. The Agreement includes these terms and conditions, these limitations and exclusions, any exhibits appended hereto and expressly referenced in these terms and conditions and any amendments to the Agreement.

Section 1.2 “Includes” and “Including” shall mean inclusive of but not limited to and shall mean by way of example rather than limitation.

Section 1.3 “School Entity” shall mean the public school entity named in this Agreement and a participating member or participant in the Program.

Section 1.4 “PSBA Insurance” shall mean the insurance company formed in 1971 by the Pennsylvania School Boards Association Insurance Trust.

Section 1.5 “BUCS” or “Program” shall mean the unemployment compensation program of PSBA Insurance, which program will provide to participating school entities a mechanism for managing unemployment compensation risks and claims and related services.

Section 1.6 “Employees” shall include all employees of the participating member who are actual employees receiving a W-2; “Employee” shall mean the individual Employees.

Section 1.7 “Parties” shall mean collectively PSBA Insurance and School Entity; “Party” shall mean the individual Parties.

Section 1.8 “State” shall mean the Commonwealth of Pennsylvania.

Section 1.9 “Agency” shall mean the department, commission or board administering the State Unemployment Compensation Law.

Section 1.10 In the event of a purchase of an aggregate excess or stop loss insurance policy for unemployment compensation claims, “Attachment Point” shall mean a certain aggregate dollar amount as solely determined by the Program, above which the aforesaid policy will be triggered.

Section 1.11 If at any time PSBA Insurance creates, maintains or operates Funds under the Program, “Funds” shall mean loss funds, reserves, or other similar accounts or funds, composed of funds paid by participating school entities in the Program.

Section 1.12 “Program Payment” shall mean a dollar amount based upon a certain percentage of the School Entity’s current taxable payroll.

Section 1.13 “UC Payment” shall mean the sum to be used to pay the School Entity’s unemployment compensation claims as they become due to the State.

Section 1.14 “Deposit” shall mean a dollar sum equal to a specific percentage of the Attachment Point, to be solely determined by PSBA Insurance. The Deposit shall include the Program Payment and the UC Payment.

Section 1.15 “Association” shall mean the Pennsylvania School Boards Association, a private, nonprofit membership association.

ARTICLE II AUTHORITY AND DUTIES OF PSBA INSURANCE

Section 2.1 Program for Managing Unemployment Compensation Risks and Claims. Subject to the terms, conditions, limitations and exclusions set forth in the Agreement, the Program will provide risk and claims management and related services for the School Entity’s unemployment compensation liability and claims, which are for benefits arising under the Unemployment Compensation Law, 43 P.S. §751 et seq. As part of the Program, and for so long as the School Entity is a participant in the Program, the Program, either directly or through sub-contractors or through its related entities, will:

A. CLAIMS CONTROL SERVICES

1. Become the agent and addressee of record with the Office or Bureau of Employment Security.
2. Analyze and record all unemployment compensation claim forms; respond promptly and accurately to all claim inquiries from the Agency.
3. Audit the claimant's eligibility, the School Entity's liability, and benefit period for each claim.
4. Protest questionable claims and improper determinations with the Local Office, Referee and Board of Review.

5. Make recommendations and assist the School Entity in preparing for all administrative appeal hearings.
6. Attend administrative hearings with the School Entity.
7. Consult with the Agency as frequently as necessary on the School Entity's behalf on all unemployment compensation matters.
8. Analyze and audit all credits and other computations pertaining to the School Entity's account, following up with the Agency on a timely basis to assure the School Entity receives appropriate adjustments to their account.

B. ADMINISTRATIVE SERVICES

1. Verify the accuracy of the unemployment compensation billings issued by the Office or Bureau of Employment Security.
2. Analyze and audit all benefit charges against the School Entity's unemployment account and protest inaccurate charges.
3. Monitor the charge sequence and allocation of liability in multiple-employer claims.
4. Ensure that disqualifications are fully enforced.
5. Apply for credits when applicable and ensure that they are received.

C. MANAGEMENT REPORTS AND INFORMATIONAL SERVICES

1. Report claims and charges on a quarterly basis in a meaningful organization.
2. Make recommendations for improvements in systems or procedures.
3. Be readily available for consultation on all unemployment compensation matters.
4. Furnish School Entity's legal counsel with any pertinent information necessary to institute any court proceedings.

D. FIELD SERVICES

1. Visit the School Entity's location as necessary.

2. Provide training programs/continuing education workshops.
3. Consult with the School Entity regarding methods of avoiding charges, stabilizing costs and other pertinent management techniques to help reduce unemployment compensation costs.
4. Participate in meetings and hearings concerning proposed legislation affecting unemployment compensation.
5. Actively pursue changes in the Unemployment Compensation Act in the best interest of the participants in BUCS.

Section 2.2 Aggregate Excess Insurance Coverage. The Program shall evaluate aggregate excess or stop loss insurance available for unemployment compensation claims in order to select an aggregate excess or stop loss insurance policy which, in PSBA Insurance's sole discretion, will meet the needs of the participants in the Program, including the School Entity.

The Program may purchase or arrange to purchase an aggregate excess or stop loss insurance policy for unemployment compensation claims that will be triggered above a certain aggregate dollar amount, as solely determined by the Program ("Attachment Point"). The aggregate excess or stop loss insurance policy purchased shall be consistent with the terms, conditions, limitations and exclusions set forth in this Agreement.

Section 2.3 Representation in Unemployment Compensation Cases. The Program has the right to select a representative, including counsel, to represent the School Entity in unemployment compensation cases involving its Employees before unemployment compensation referees and the Unemployment Compensation Board of Review. The Program will not pay fees and costs of any representative or firm that the Program has not approved in writing.

Section 2.4 Maintenance and Operation of Funds. The Program may, at its sole discretion, create, maintain and operate loss funds, reserves, or other similar accounts or funds, composed of funds paid by participating school entities for proper purposes (collectively "Funds"), including, to pay the costs and expenses of the Program, to stabilize fluctuations of claims costs and expenses, to purchase an aggregate excess or stop loss insurance policy for unemployment compensation claims, to pay costs and fees of administering the Program and to pay such other costs and expenses of the operation of the Program as may be appropriate. Such Funds, if established, shall belong to the Program and no participating public school entity shall have any individual entitlement to or ownership of such Funds. Such Funds, if created, shall be used exclusively for the benefit of participating school entities, after payment of such costs and expenses related to the Program.

Section 2.5 PSBA Insurance's Liability Limitation. If at any time PSBA Insurance creates, maintains or operates Funds under the Program pursuant to Section

2.4, PSBA Insurance shall maintain such Funds as a separate fund for the specific purpose of the Program. No other assets of PSBA Insurance, including any other fund or sub-fund established by or under PSBA Insurance, shall be subject to or liable for any claim, liability, dispute, or action arising under this Agreement or for any demand or claim made against the Program, Including any interest, fees, costs and other assessments made thereon.

The obligations of PSBA Insurance created hereunder or pursuant to the Program are not personally binding upon, nor shall resort be had to the property of, any of the trustees, settlors, officers, employees, attorneys, or agents of PSBA Insurance, or any parent or subsidiary entity.

Section 2.6 No Ownership Interest. Notwithstanding anything herein to the contrary, the School Entity shall not have any ownership interest in the Program or in any funds or assets of the Program or PSBA Insurance, including any other fund or sub-fund established by or under PSBA Insurance; and the School Entity shall not have any ownership interest in any of the payments made by the School Entity into the Program.

ARTICLE III THE SCHOOL ENTITY'S DUTIES

Section 3.1 Application. In order to be considered for participation in the Program, and thereafter on an annual basis, the School Entity, a member of the Association in good standing, shall complete an application in a format prepared by PSBA Insurance, shall submit it to the Program by a certain date designated by PSBA Insurance, and shall certify and warrant that all of the information provided by the School Entity on the application is true and correct. PSBA Insurance and the other School Entities participating in the Program are doing so in strict reliance upon a full, complete, and accurate disclosure of all information by the School Entity on its application. The application completed by the School Entity is attached hereto as Exhibit "A," which is fully incorporated herein by reference, and the School Entity hereby certifies and warrants that the information set forth on the application has been used as an inducement to be allowed to participate in the Program.

Section 3.2 School Entity Payments. The School Entity shall make the payments set forth in the invoices, as prepared by PSBA Insurance, to the Program in order to participate in the Program. These amounts are subject to change each year by the Program.

The Program shall also send invoice(s) to the School Entity stating any additional amount(s) due as a result of any audit(s) conducted. Upon receipt of any invoice stating any outstanding amount due, the School Entity shall promptly pay to the Program such amount within thirty (30) days of the date of the invoice. The School Entity's failure or refusal to make any payments to the Program in accordance with the terms and conditions of this Agreement in a timely manner shall result in the School Entity's obligation to pay interest at the rate of 1 ½ % per month, compounded, plus the payment of reasonable

attorneys fees and costs in the event that PSBA Insurance initiates proceedings to recover the amounts due and owing.

Section 3.3 Program Payment and UC Payment. Annually by a certain date designated by PSBA Insurance, the School Entity shall pay to the Program a dollar sum equal to a specific percentage of the Attachment Point, to be solely determined by PSBA Insurance (“Deposit”). The Deposit shall include a dollar amount based upon a certain percentage of the School Entity’s current taxable payroll (“Program Payment”) plus an additional sum to be used to pay the School Entity’s unemployment compensation claims as they become due to the State (“UC Payment”).

The Program will use the UC Payment to reimburse the State for the School Entity’s unemployment compensation claims up to and including the Attachment Point. In the event that the UC Payment is not sufficient to cover those claims, on a quarterly basis, the Program shall send an invoice to the School Entity for reimbursement for the School Entity’s unemployment compensation claims up to and including the Attachment Point. The School Entity shall timely and fully pay the Program for all unemployment compensation claims of its employees (whether or not Employees) up to and including the Attachment Point. Upon receipt of any invoice stating any outstanding payment due, the School Entity shall promptly pay to the Program such amount within thirty (30) days of the date of the invoice. The School Entity hereby agrees to indemnify and hold harmless PSBA Insurance, the Pennsylvania School Boards Association Insurance Trust, the Program, and the Association from and against any actions, claims, demands, causes of action, fees and costs, including reasonable attorneys fees and costs, resulting from the failure of the School Entity to timely and fully pay the Program for such unemployment compensation claims when due.

At the end of each year in which the School Entity participates in the Program, upon the School Entity’s full payment to the Program for any of its outstanding claims of its employees (whether or not Employees), any remainder of the UC Payment for that year will either be returned to the School Entity or credited to the School Entity in determining its UC Payment to the Program for the following year.

Section 3.4 Compliance with Program Terms. The School Entity shall comply with all terms and be subject to all conditions, limitations and exclusions set forth in the description of the Program and in this Agreement.

Section 3.5 Contest of Claims. In the event that the School Entity determines to challenge the validity of an Employee’s claim for unemployment compensation benefits, then the School Entity shall cooperate in all respects with the Program and any administrator in the prosecution of such challenge. Further, in the event that a challenge is not successful, the School Entity shall remain fully liable in respect of the claim, including any interest, fees, costs and other assessments made thereon.

Section 3.6 Compliance with Procedures and Requirements of the Program. The School Entity shall comply with the procedures and requirements of the Program that are

adopted from time to time by PSBA Insurance for purposes of ensuring effective and cost efficient claims handling. The School Entity shall:

A. REPORTING CLAIMS

Provide data to PSBA Insurance on forms to be provided by PSBA Insurance regarding Employee separations or layoffs.

Provide data on rehires of persons previously separated from employment by the School Entity who may be included in the base period of the School Entity for which an unemployment compensation claim may be assessed.

Provide to PSBA Insurance notification of job openings that may be available for employees furloughed or separated from employment.

B. GRANT OF AUTHORITY

Grant any and all necessary powers, authority and permissions to the administrator selected by PSBA Insurance to represent the School Entity before the Pennsylvania Department of Labor and Industry and its offices (L&I) related to unemployment compensation matters. This Includes granting the selected administrator authority and permissions on the electronic portals operated by L&I.

Approve and execute such instruments or other documents needed by administrator to represent the School Entity and process claims and administer the School Entity's account, including executing any power of attorney required for representation by the selected administrator as may be requested from time to time.

C. TESTIMONY AT HEARINGS

Make appropriate personnel available to provide necessary testimony with the proper officials and referees of the Agency.

D. ANNUAL AUDIT

Provide to the administrator of BUCS, on forms supplied by PSBA Insurance, the annual audit information required by such forms which shall be returned within sixty (60) days of the date on which the forms are supplied to the School Entity. Failure of the School Entity to complete the annual audit information and timely return any form within the sixty (60) day period shall result in the Program assessing a 15% administrative fee on the payments due under Sections 3.2 and 3.3 in this Agreement.

E. OTHER DUTIES

Cooperate fully and in a timely manner with PSBA Insurance or its designated agents or administrator in the processing or defense of any claims. Cooperation includes providing timely notice and information, witnesses and documentation as necessary.

Section 3.7 Lockouts. The School Entity shall not engage in a lockout which would result in any of its employees being entitled to unemployment compensation. If the School Entity does engage in a lockout or fails to comply with any of the provisions in this Agreement, the Program shall not be responsible for defending any claims associated with the work stoppage or for paying any claims associated with the work stoppage.

It is recognized that the School Entity may engage in activity which is not intended to be a lockout but which might later be construed to constitute a lockout. Such circumstance shall not deprive the School Entity of the right to have its unemployment compensation claims related to the work stoppage defended or paid by the Program, provided that the provisions of this Section 3.7 have been complied with by the School Entity.

If the School Entity should experience any work stoppage in connection with a labor dispute, it shall as soon as possible, but in all events within forty-eight (48) hours, notify PSBA Insurance of such fact and confirm such notice in writing to PSBA Insurance. The School Entity shall be under a continuing duty to update PSBA Insurance of the facts and of claims that the employees may be making that there was either a lockout or an alteration of the status quo.

Whenever the Program shall become aware of any act or omission on the part of the School Entity which, in the opinion of PSBA Insurance, may expose the School Entity to the risk of having caused a lockout, PSBA Insurance shall immediately notify the School Entity in writing of such fact and shall specifically advise the School Entity of the action which the School Entity should take to either prevent or reduce the risk of a lockout occurring. The School Entity agrees to promptly take such action as PSBA Insurance advises is necessary to prevent, abate, or reduce the risk of a lockout. If the School Entity fails or refuses, after written notice to take such action to prevent, abate or reduce the risk of a lockout, then the Program shall not be responsible to either defend or pay the claim(s) associated with the work stoppage.

Section 3.8 Audit. PSBA Insurance shall have the right at reasonable times to conduct an Employee count and payroll audit of the School Entity at the sole cost of PSBA Insurance.

Section 3.9 Association Membership. The School Entity shall maintain membership with the Association throughout the term of this Agreement. Should the School Entity's Association membership cease, PSBA Insurance may terminate this Agreement with thirty (30) days notice pursuant to the provisions of Section 4.1.

ARTICLE IV MISCELLANEOUS

Section 4.1 Term of the Agreement, Notice of Increase and Termination. The term of this Agreement shall be one year commencing on the 1st day of July, 2026 and ending June 30, 2027. Either Party may terminate this Agreement at the end of said one year term by giving to the other Party written notice thereof at least ninety (90) days prior thereto. If there is any default of the aforesaid notice, this Agreement shall continue upon the same terms, conditions, limitations and exclusions governing the same as are in force immediately prior to the expiration of the term hereof, subject to any amendment by the Parties and subject to any increase in payments due under Sections 3.2 and 3.3 of this Agreement, for a further period of one (1) year and so on from year-to-year, unless or until terminated by either Party on ninety (90) days written notice. PSBA Insurance shall give ninety (90) days notice to the School Entity of any increase in the payments due. Notwithstanding any provision to the contrary, if the School Entity fails to perform any obligation hereunder or make any payment due, PSBA Insurance may terminate this Agreement and the School Entity's participation in the Program at any time by giving thirty (30) days notice thereof to the School Entity. Notwithstanding any provision to the contrary, PSBA Insurance may immediately terminate this Agreement and the School Entity's participation in the Program at any time if the School Entity makes any misrepresentation or fraudulent statement or provides false information to the Program or conceals any fact for the purpose of misleading the Program.

In the event of the termination of this Agreement, or the termination of the Program pursuant to Section 4.2, no Program Payment nor any other funds or payments will be returned to the School Entity, EXCEPT THAT, upon the School Entity's full payment to the Program for any of its outstanding claims of its employees (whether or not Employees), the Program will return to the School Entity any remainder of the School Entity's UC Payment made by the School Entity pursuant to Sections 3.2 and 3.3. The Program will make such return within one hundred and twenty (120) days after the effective date of such termination.

Section 4.2 Termination of the Program. Notwithstanding any provision to the contrary, in the event that PSBA Insurance receives a notice to terminate the aggregate excess or stop loss insurance policy, PSBA Insurance may terminate the Program by giving ninety (90) days notice thereof to the School Entity, which thereby terminates the Agreement. PSBA Insurance may also terminate the Program at any time in its sole discretion by giving ninety (90) days notice thereof to the School Entity, which thereby terminates the Agreement.

Section 4.3 Services and Release of Records. In the event of termination of this Agreement, PSBA Insurance will (unless instructed by the School Entity not to do so) (1) review the Agency's invoice for the last calendar quarter immediately preceding the date when the termination is effective and provide that invoice to the School Entity, (2) report the School Entity's claims and charges for the last calendar quarter immediately

preceding the date when the termination is effective and (3) release to the School Entity, in PSBA Insurance's standard format, all records and files relating to claims paid under the Program pursuant to this Agreement.

Section 4.4 Fees after Termination. Except for the services listed in Section 4.3, if PSBA Insurance performs any services following the termination of this Agreement in connection with any unemployment compensation claims of the School Entity, PSBA Insurance shall be entitled to reasonable fees in light of the work and costs incurred.

Section 4.5 Surviving Provisions. Notwithstanding anything herein to the contrary, the following sections of this Agreement shall survive termination of this Agreement: Sections 2.4, 2.5, 2.6, 2.7, 3.2, 3.3, 3.4, 3.5, 3.8, 4.1, 4.3 through 4.20.

Section 4.6 Governing Law. This Agreement will be governed by and construed in accordance with the laws of the State.

Section 4.7 Jurisdiction; Venue. Any claim, dispute or action arising under this Agreement shall be brought in the Court of Common Pleas of Cumberland County, Pennsylvania. The Parties hereby agree that such court shall have exclusive jurisdiction over any such proceeding.

Section 4.8 Assignment. This Agreement may not be assigned by either Party; provided, however, PSBA Insurance may delegate its duties under this Agreement, or its rights under this Agreement to any of its related entities upon such terms and conditions that it may determine in its sole discretion.

Section 4.9 No Third-Party Beneficiaries. This Agreement shall inure only to the benefit of, and shall be binding upon, the Parties as specifically and expressly identified herein and their respective successors. This Agreement is not intended to benefit any person, party or entity not a Party hereto and shall not inure to the benefit of any third person, party or entity.

Section 4.10 Severability. All covenants and obligations contained in this Agreement are severable. In the event that any provision of this Agreement should be held to be unenforceable, the validity and enforceability of the remaining provisions shall not be affected thereby. Any court or arbitrator construing this Agreement is expressly granted the authority to revise any invalid or unenforceable provision hereof in order to render it enforceable.

Section 4.11 Headings. The headings of any portion of this Agreement are for reference purposes only and shall not in any way affect the meaning or interpretation thereof.

Section 4.12 Notices. All notices, requests and approvals required by this Agreement: (A) shall be given in writing; (B) shall be sent by certified mail or by recognized overnight carrier, in each case with acknowledgement of receipt; (C) shall be

addressed to the Parties as indicated in the preamble of this Agreement unless either Party notifies the other of a change in address by notice given hereunder; and (D) assuming acknowledgment of receipt, shall be deemed to have been given on the date the notice, request or approval is sent.

Section 4.13 Waiver. One or more waivers of any covenant, term or condition contained herein shall not be construed as a waiver of a subsequent breach of the same covenant, term or condition. The consent or approval by any Party to, or of, any waiver or other act or omission requiring such consent or approval shall not be deemed to constitute a waiver or render unnecessary obtaining consent or approval of any subsequent similar act or omission by any other Party.

Section 4.14 Lawful Performance. Each Party agrees that it will perform its obligations hereunder in accordance with all applicable laws, rules and regulations now or hereafter in effect.

Section 4.15 Context. Reference in this Agreement to the singular shall be meant to include reference to the plural and vice versa. Reference in this Agreement to the masculine gender shall be meant to include the female and neuter genders and vice versa.

Section 4.16 Force Majeure. PSBA Insurance shall not be liable for any failure to perform under this Agreement if such failure is due to causes beyond its reasonable control, including, acts of God or the public enemy, fire, floods, labor disputes, or the judgment or order of any court or government agency.

Section 4.17 Integration. This Agreement constitutes the entire agreement between the Parties with respect to the subject matter hereof and supersedes any negotiations or prior agreements or understandings between the Parties with respect to the subject matter hereof. This Agreement may not be modified or amended by any oral statement or course of conduct, but only by a written agreement signed by all Parties. There are no representations, promises, agreements, warranties, covenants or undertakings of the Parties other than those expressly contained herein.

Section 4.18 Counterparts. In the event that two or more copies of this Agreement are executed by all of the Parties hereto, each copy shall be deemed an original, but all shall collectively constitute the same instrument.

Section 4.19 Remedies and Waivers of Rights. All remedies of the Parties hereto shall be cumulative. No Party hereto shall be deemed to have waived any of its rights, powers, or remedies hereunder unless such waiver is in writing and signed by the Parties hereto.

Section 4.20 Authority to Bind. By their execution of this Agreement, all persons signing this Agreement on behalf of a Party warrant to the other Party that they are authorized to enter into, and execute, this Agreement by, and on behalf of, the governing body of that Party by all necessary resolutions or actions.

IN WITNESS WHEREOF, the Parties hereto, with the intention of being legally bound hereby, have caused this Agreement to be signed and sealed the day and year set forth below.

PSBA INSURANCE

SCHOOL ENTITY

By: Christina Griffiths

By: _____

Title: Chief Operating Officer

Title: _____

Signature: _____

Signature: _____

By: _____

Title: _____

Signature: _____

Date: _____

Date: _____

Address: 400 Bent Creek Boulevard

Address: _____

Mechanicsburg, PA 17050

EXHIBIT A

2/9/26, 1:02 PM

WPForms Print Preview - 2026-2027 BUCS Comprehensive Enrollment Form

2026-2027 BUCS Comprehensive Enrollment Form - Entry #1329

Name Lori Higley
School entity East Lycoming School District
Phone (570) 584-2131
Email lhigley@elsd.org
Total number of employees with wages more than \$10,000 216
Total number of employees with wages less than \$10,000 178
Total wages paid to employees with less than \$10,000 457098.13
Please upload documentation for above figures  UC-Report.pdf
2025 Q1-941 form  941-Report.pdf

https://psbainsurance.com/wp-admin/admin.php?page=wpforms-entries&view=print&entry_id=1329

1/2

Do you anticipate any restructuring or reduction of revenue sources resulting in layoffs in the upcoming school year (2026-2027)?

No

Have you experienced any staff reductions, other than regular seasonal, in the last 36 months?

No

What services do you currently outsource?

Bus Driver
Substitutes

What services do you anticipate outsourcing in the upcoming school year (2026-2027)?

Bus Driver
Substitutes

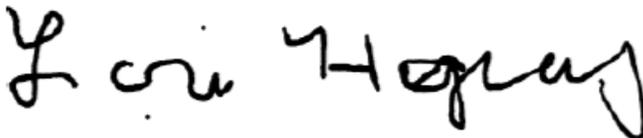
The information provided on this application form has been confirmed by all necessary parties within this organization to be true, accurate, and complete to the best of our knowledge. We acknowledge that any misrepresentation will result in immediate cancellation of service.

I Agree

Who should the contract be sent to? Please provide 2 people with emails.

Heather Burke hburke@elsd.org
Mark Stamm mstamm@elsd.org

Signature



[PSBA Insurance](#)

March 3, 2026

RE: IU #17 2026/2027 Proposed General Operations Budget

Members of the Board:

Presented for your review and discussion is the 2026/2027 Proposed IU #17 General Operations Budget. The General Operations Budget has been reviewed by the IU #17 Superintendent's Advisory Council and adopted by the IU Board of Directors on January 21, 2026.

It is then presented to the Board of Directors of each component school district for consideration and official action of adoption at a regularly scheduled meeting prior to April 15, 2026.

Mr. Holmes is the IU Board representative for ELSD.

Respectfully,
Dr. Mark Stamm
Superintendent



Intermediate Unit 17

Proposed 2026-2027 General Operations Budget

- Bradford
- Lycoming
- Sullivan
- Tioga

Board Member Copy

Office Locations:

- 2400 Reach Road, Williamsport
570-323-8561 Voice / 570-323-1738 Fax
- 33 Springbrook Drive, Canton
570-673-6001 Voice / 570-673-6007 Fax

Reviewed by the IU Council on January 9, 2026
Approved by the IU 17's Board of Directors on January 21, 2026

BLaST IU 17

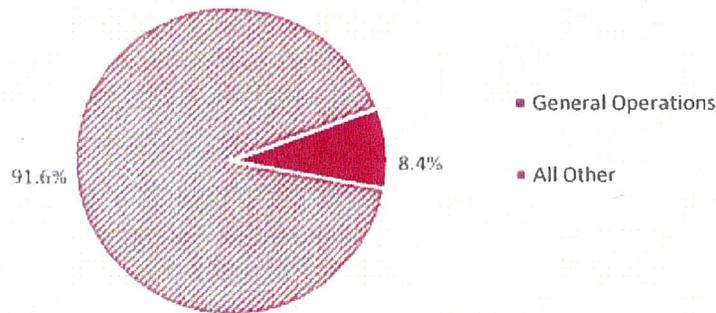
Proposed Budget

2026/2027

Executive Summary

The IU team invites your inquiries and suggestions for its budgets and services and is available to discuss them at any district board meeting or administrative team meeting. Please direct inquiries to Christina Steinbacher-Reed, Executive Director or Sara McNett, Director of Management Services at (570) 673-6001.

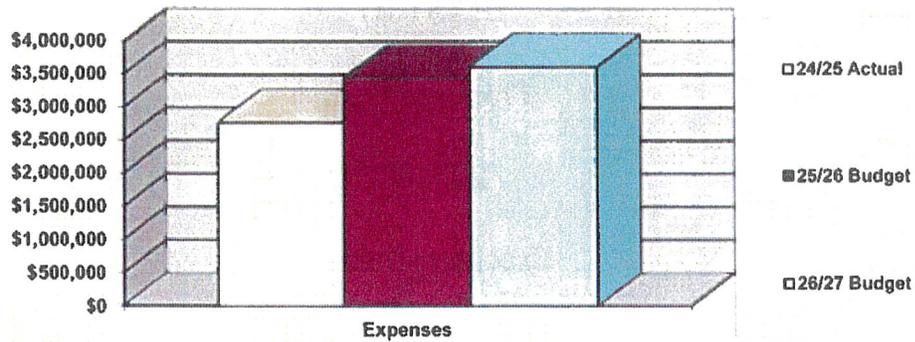
Overview:



This budget package contains a balanced budget for the General Operation (Funds 10 and 12) of IU 17. This budget does not include most program budgets for Federal, State, or local sources for specific purposes. Examples of these budgets are IDEA Supplemental Education Services (Individuals with Disability Education Act), Alternative Ed, partial hospitalization, Software consortium, eQUIP, etc. These budgets are governed by IU 17's Board of Directors and are adopted throughout the year. As the pie chart above illustrates, the General Operations Budget (Funds 10 and 12) comprises approximately 8.4% of the I.U. budgets, as compared to 8.2% last year.

General Operations:

Again this year, there is no assessment to the districts being proposed to support the General Operations Budget.



Expenses:

As the above graph indicates, budgeted expenses are higher than last year's by approximately \$175,162, for an increase of 5.09%. Aside from normal year-over-year growth in employee salaries, a key driver in the increasing expenses is rising employee benefit costs. Early projections for healthcare insurance require a 14.1% budgetary increase for this benefit. Fortunately, growth in required employer share for PSERS retirement contributions has now slowed. The current budget reflects estimated 2026-27 salaries, with actual employee salaries to be set by the IU 17 Board of Directors during the Spring of 2026.

We have an anticipated capital transfer amount of \$200,000 in order to continue building a reserve to replace the heating units and fund upgrades and upkeep at both the Canton and Williamsport offices. Also, it is important to note that some expenses are allocated across many IU budgets (utilities, copiers, etc.) As revenue to other budgets diminishes, and salary, health care and PSERS increase, there is an increased pressure on the General Operations budget to absorb these costs.

Revenue:

The General Operations Subsidy for Intermediate Units remains eliminated from the State budget. IU 17 has been fortunate to receive revenue-generating opportunities from the state in past years, but a change in PDE's procurement strategy for Statewide System of Support initiatives has altered this revenue stream by channeling contracts through larger Intermediate Units that act as a "prime contractor" to PDE. We must continue to be proactive in seeking contracting opportunities outside IU 17 in order to fund our general operations without placing a financial burden on IU 17 member districts. We continue to contract services and products to our districts, as well as to districts and Intermediate Units throughout the state, to generate revenue in support of the General Operations budget.

IU 17 receives a significant portion of its revenue from indirect cost streams related to many of its state and federal programs. As these programs continue to experience flat funding or very small increases, we are struggling to accommodate salary and benefit increases within program grant funds. As a result, the indirect cost pool is being tapped to help cover these expenses, placing additional pressure on General Operations revenue. To the extent these revenues decrease, fund balance will be used, if necessary.

In order to continue providing delivery of training and technical assistance services to our member districts at no charge whenever possible, IU 17 intends to once again apply to PDE for an administrative waiver of 11% of Component 2 funds to support training and consultative (TAC) services.

There is no assessment to the IU 17 member school districts. On the affirmative vote of the IU Superintendents, we will request a \$2,500 per district contribution to help defer the cost of continuing professional development for school district administrative staff.

BUDGET ADOPTION PROCESS

1. The IU 17 Team prepares the General Operation Budget.
2. The IU 17 Advisory Council of Superintendents reviews the Budget.
3. Reviewed and recommended for adoption to the IU 17 Board of Directors.
4. The Intermediate Unit Board of Directors shall, at least thirty (30) days before May 1st, adopt and advertise the proposed Intermediate Unit budget.
5. Copies of the approved budget are provided to each school board member of each component school district for consideration and approval.
6. The budget approval requires: (a) the affirmative vote of a majority of the nineteen school districts, and (b) a majority of the proportionate weighted votes (as determined by the Pennsylvania Department of Education) calculated from the resolution. This resolution is to be submitted to the Intermediate Unit by each board's secretary no later than April 15, 2026.

BLaST Intermediate Unit 17
General Operations (Funds 10 and 12)

	Revenue		
	24/25 Budget	25/26 Budget	26/27 Budget
Interest	\$225,000	\$295,000	\$325,000
Indirect Cost/transfer from fund	\$1,217,387	\$1,235,317	\$1,299,420
Contracted Services	\$1,554,195	\$1,578,215	\$1,644,944
State Support (Retirement/SS)	\$314,329	\$329,927	\$344,257
	\$3,310,911	\$3,438,459	\$3,613,621

**General Operations - Fund Balance Summary
2026-2027**

Anticipated June 30, 2026 Fund Balance Fund 10	\$2,000,000
Total Revenue	\$3,613,621
Total Available Resources	\$5,613,621
Total Budgeted Expenses	\$3,613,621
Projected Unreserved Fund Balance - June 30, 2027	\$2,000,000

**BLaST INTERMEDIATE UNIT 17
GENERAL OPERATIONS FUND 10**

Function	Object		24/25 Actual	25/26 Budget	25/26 Projected Actuals	26/27 Budget
2310	151	Salaries-Board Services	\$594	\$0	\$0	\$0
2310	331	Legal Services	\$3,387	\$2,100	\$2,100	\$2,100
2310	500's	Board Travel/Meals/Advertising	\$4,185	\$5,300	\$5,300	\$5,300
2350	331	Legal Services	\$0	\$3,000	\$3,000	\$3,000
2360	111/151	Salaries-Office of Exec. Dir.	\$205,409	\$218,860	\$218,860	\$233,061
2360	200's	Benefits-Office of Exec. Dir.	\$139,367	\$154,940	\$154,940	\$160,536
2360	390	Purchased Prof Serv	\$3,810	\$4,000	\$4,000	\$4,000
2360	540	Advertising	\$0	\$1,000	\$1,000	\$1,000
2360	550	Communications	\$0	\$500	\$500	\$500
2360	580	Staff Travel/Other Expenses	\$42,125	\$43,500	\$43,500	\$53,000
2360	610	Administrative Supplies	\$8,085	\$3,500	\$3,500	\$3,500
2360	640	Books/Publications	\$250	\$1,000	\$1,000	\$1,000
2360	810	Dues/Memberships	\$11,091	\$10,000	\$10,000	\$12,000
2380	111	Salaries-Office of Principal Ser.	\$52,233	\$78,000	\$48,333	\$89,610
2380	200's	Benefits-Office of Principal Ser	\$48,268	\$46,487	\$32,000	\$56,930
2380	580	Staff Travel/Other Expenses	\$1,190	\$2,872	\$2,872	\$8,000
2380	610	Supplies	\$336	\$1,000	\$1,000	\$1,000
2380	810	Dues/Memberships	\$0	\$250	\$250	\$250
2500	111/112/151	Salaries- Business Office	\$342,294	\$435,621	\$435,621	\$467,182
2500	200's	Benefits - Business Office	\$233,857	\$284,542	\$284,542	\$328,687
2500	330	Audit/Legal	\$8,767	\$8,000	\$8,000	\$10,000
2500	340	Contracted Services	\$425	\$2,000	\$2,000	\$2,000
2500	531	Communication - Telephone	\$25	\$250	\$250	\$250
2500	532	Communication - Postage	\$3,539	\$3,750	\$3,750	\$3,750
2500	540	Advertising	\$2,302	\$250	\$250	\$250
2500	580	Staff Travel/Other Expenses	\$15,090	\$19,500	\$19,500	\$20,000
2500	610	Supplies	\$31,517	\$18,000	\$25,000	\$18,000
2500	750	Equipment-Noninstructional	\$0	\$0	\$0	\$0
2500	810	Dues/Memberships	\$6,938	\$7,000	\$7,000	\$7,000
2600	330	Professional Services	\$464	\$1,000	\$1,000	\$1,000
2600	411	Disposal Service	\$3,542	\$3,000	\$3,800	\$3,000
2600	413	Contracted Serv. Cleaning	\$27,548	\$28,000	\$28,000	\$30,000
2600	432	Contracted Serv. Maint.	\$29,691	\$25,000	\$25,000	\$28,000
2600	442	Rental - Equipment	\$3,858	\$8,000	\$8,000	\$8,000
2600	520	General Insurance	\$3,000	\$3,000	\$3,000	\$3,000
2600	610	Supplies- Cleaning	\$2,742	\$2,000	\$3,000	\$3,000
2600	620	Energy (Gas & Electric)	\$10,763	\$15,000	\$15,000	\$18,000
2600	750	Equipment-Noninstructional	\$0	\$0	\$0	\$0
2830	151	Salaries - Personnel	\$71,056	\$119,341	\$119,341	\$122,100
2830	200's	Personnel Benefits	\$75,092	\$76,159	\$76,159	\$79,674
2830	540	Advertising (personnel Ads)	\$2,777	\$2,000	\$2,000	\$2,000
2830	580	Staff Travel	\$5,189	\$3,000	\$5,000	\$3,000
2830	611	Supplies	\$138	\$1,000	\$1,000	\$1,000
2840	111/151	Salaries - Technology	\$421,156	\$620,108	\$620,108	\$638,711
2840	200's	Personnel Benefits	\$271,831	\$395,360	\$395,360	\$402,251
2840	330	Contracted Services	\$51,014	\$35,000	\$50,000	\$35,000
2840	530	Communications	\$6,393	\$8,000	\$8,000	\$8,000
2840	580	Staff Travel	\$18,072	\$30,000	\$25,000	\$30,000
2840	600's	Supplies	\$206,448	\$240,000	\$240,000	\$220,000
5200	400	Bldg Purch/Renov	\$200,000	\$200,000	\$200,000	\$200,000
5900	840	Budgetary Reserve	\$0	\$8,500	\$31,854	\$5,000
Fund 10 Total (General Operation)			\$2,575,857	\$3,178,690	\$3,178,690	\$3,332,642

Comprehensive Listing of All BLaST IU 17 Budgets
Fiscal Year - 2026-2027

AUN: 1-17-00-000-0

Fund	Description	Director	Source	Rate	Amount
16	NTIC Health Professional	McNett	NTIC	0	\$ 95,145
19	Act 89	Coran/Pepper	State Grant	0.06	\$ 768,607
20	Equip	Segraves	Districts	0	\$ 1,115,747
20	DBRT	Beck/Pepper	State	0	\$ 89,000
21	LCIC Health Professional	McNett	LCIC	0	\$ 148,393
23	Special Ed Core	Swinehart/Pepper	State Grant	0.06	\$ 2,074,957
23	Special Ed Contracted	Swinehart/Pepper	Districts	0.05	\$ 8,189,000
24	Transportation EI	Swinehart/Pepper	State	0.08	\$ 915,129
25	Institutionalized Child	Swinehart/Pepper	State/Districts	0.06	\$ 243,768
26	State Early Intervention	Swinehart/Hindman/Pepper	State Grant	0.08	\$ 5,442,828
33	Preschool 619	Swinehart/Hindman/Pepper	Federal	0.08	\$ 613,791
40	IDEA Part B-School Age C-2 and C-3	Segraves/Pepper	Federal	0	\$ 7,649,225
40	IDEA PART B- EI	Swinehart/Hindman/Pepper	Federal	0.08	\$ 839,758
41	PATTAN	McNett/Pepper	Federal	0.08	\$ 1,925,327
44	T1 D	McNett/Beck	Federal	0	\$ 132,418
49	Data Governance	Segraves/Beck	State	0.08	\$ 12,000
49	STEM State	Segraves/Beck	State	0	\$ 90,500
49	CDT Focus and Support	Segraves/Beck	State	0	\$ 5,600
49	A-TSI	Segraves/Beck	State	0	\$ 22,350
49	Accelerated Learning Title I	Segraves/Beck	State	0.08	\$ 73,460
49	Accelerated Learning Title II	Segraves/Beck	State	0.08	\$ 81,200
53	Professional Certification Testing	Beck/Pepper	State	0	\$ 80,960
52	Access	McNett/Pepper	Federal	0	\$ 425,000
57	WAN	McNett/Paulhamus	State	0	\$ 625,000
59	ELECT	McNett/Beck	State	0.08	\$ 364,734
70	North Partial	Swinehart/Pepper	Districts	0.05	\$ 680,820
71	Lycoming Partial	Swinehart/Pepper	Districts	0.05	\$ 340,768
72	South Partial	Swinehart/Pepper	Districts	0.05	\$ 1,040,908
73	Tioga Partial	Swinehart/Pepper	Districts	0.05	\$ 349,448
74	LaSaQuik	Swinehart/Pepper	Districts	0.05	\$ 185,767
75	Clear Vision	Swinehart/Pepper	Districts	0.05	\$ 329,060
76	Lycoming Day Treatment	Swinehart/Pepper	Districts	0.05	\$ 417,996
77	Intergrated Studies South	Swinehart/Pepper	Districts	0.05	\$ 1,731,958
78	intergrated Studies North	Swinehart/Pepper	Districts	0.05	\$ 866,248
79	Elkland Partial	Swinehart/Pepper	Districts	0.05	\$ 185,419
82	Software Resell Budget	Confer	Districts	0	\$ 915,000
91	Bridge Program Lycoming County	Swinehart/Pepper	Districts	0.05	\$ 255,000
92	Bridge Program Bradford County	Swinehart/Pepper	Districts	0.05	\$ 165,000
					\$ 39,487,289

IU 17 Assessment History

The following is a HISTORY OF GENERAL OPERATIONS ASSESSMENT TO DISTRICTS

Fiscal Year	\$ Assessment	Fiscal Year	\$ Assessment
1971-72	0	2011-12	0
1972-73	0	2012-13	0
1973-74	0	2013-14	0
1974-75	10,000	2014-15	0
1975-76	54,218	2015-16	0
1976-77	70,755	2016-17	0
1977-78	12,020	2017-18	0
1978-79	10,080	2018-19	0
1979-80	0	2019-20	0
1980-81	0	2020-21	0
1981-82	20,980	2021-22	0
1982-83	5,000	2022-23	0
1983-84	41,650	2023-24	0
1984-85	43,260	2024-25	0
1985-86	0	2025-26	0
1986-87	39,815		
1987-88	0		
1988-89	0		
1989-90	0		
1990-91	0		
1991-92	0		
1992-93	0		
1993-94	0		
1994-95	0		
1995-96	0		
1996-97	0		
1997-98	0		
1998-99	0		
1999-00	0		
2000-01	0		
2001-02	0		
2002-03	0		
2003-04	0		
2004-05	0		
2005-06	0		
2006-07	0		
2007-08	0		
2008-09	0		
2009-10	0		
2010-11	0	Total	\$309,778

BOARD OF DIRECTORS

Athens Area School District	Vacated
Canton Area School District	Arica Jennings
East Lycoming School District	Randy Holmes
Jersey Shore Area School District	Jessie Edwards
Loyalsock Township School District	Michael Zicoello
Montgomery Area School District	Vacant
Montoursville Area School District	Sharon Meyer
Muncy School District	Krista McMonigle
Northeast Bradford School District	Debra Hicks
Northern Tioga School District	Julie Preston
Sayre Area School District	Debra Agnew
Southern Tioga School District	Chad Riley
South Williamsport Area School District	Cathy Bachman
Sullivan County School District	Vacant
Towanda Area School District	Brady Finogle
Troy Area School District	LuAnn Knapp
Wellsboro Area School District	Jerry Curreri
Williamsport Area School District	Lori Baer
Wyalusing Area School District	Duane Naugle

ADVISORY COUNCIL OF SUPERINTENDENTS

Athens Area School District
Canton Area School District
East Lycoming School District
Jersey Shore Area School District
Loyalsock Township School District
Montgomery Area School District
Montoursville Area School District
Muncy School District
Northeast Bradford School District
Northern Tioga School District
Sayre Area School District
South Williamsport Area School District
Southern Tioga School District
Sullivan County School District
Towanda Area School District
Troy Area School District
Wellsboro Area School District
Williamsport Area School District
Wyalusing Area School District

Craig Stage
Amy Martell
Mark Stamm
Brian Ulmer
Brooke Beiter
Joseph Stoudt
Daniel Taormina
Craig Skaluba
Matthew Holmes
Kristopher Kaufman
Michael Wells
Eric Briggs
Sam Rotella, Jr.
Samantha Kahler
Erick Cummings
Brad Feldmeier
Cheryl Sottolano
Timothy Bowers
Gary Otis

IU 17 NONDISCRIMINATION POLICY

BLaST INTERMEDIATE UNIT 17, AN EQUAL OPPORTUNITY EMPLOYER, WILL NOT DISCRIMINATE IN EMPLOYMENT, EDUCATIONAL PROGRAMS OR ACTIVITIES, BASED ON RACE, COLOR, RELIGIOUS CREED, NATIONAL ORIGIN, SEX, AGE, ANCESTRY, NON-RELEVANT HANDICAPS AND DISABILITIES, OR UNION MEMBERSHIP. THIS POLICY OF NONDISCRIMINATION EXTENDS TO ALL OTHER LEGALLY PROTECTED CLASSIFICATIONS. PUBLICATION OF THIS POLICY IN BLaST, INTERMEDIATE UNIT 17's DOCUMENTS IS IN ACCORDANCE WITH STATE AND FEDERAL LAWS INCLUDING TITLE VI OF THE CIVIL RIGHTS ACT OF 1964, TITLE IX OF THE EDUCATION AMENDMENTS OF 1972, SECTIONS 503 AND 504 OF THE REHABILITATION ACT OF 1973, THE AGE DISCRIMINATION ACT OF 1975, AND THE AMERICANS WITH DISABILITIES ACT OF 1990 (ADA).

FOR INFORMATION REGARDING CIVIL RIGHTS OR GRIEVANCE PROCEDURES, CONTACT CHRISTINA STEINBACHER-REED, TITLE IX, SECTION 503 / 504 COORDINATOR, AT, 2400 REACH ROAD, WILLIAMSPORT, PA. FOR INFORMATION REGARDING THE AMERICANS WITH DISABILITIES ACT PROCEDURES, SERVICES, ACTIVITIES, AND FACILITIES WHICH ARE ACCESSIBLE TO AND USEABLE BY HANDICAPPED PERSONS, CONTACT CHRISTINA STEINBACHER-REED, EXECUTIVE DIRECTOR, AT 2400 REACH ROAD, WILLIAMSPORT, PA 17701.

March 3, 2026

Re: RFP for Solicitor

Members of the Board

As requested by the Board, RFPs for a new school solicitor were accepted from January 16 through February 16. The district received four proposals:

Levin Legal Group*
McNerney, Page, Vanderlin, and Hall*
Sweet, Stevens, Katz, and Williams*
Perciballi and Williams LLC

As of Thursday, February 26, three firms planned to send representatives to the meeting (*).

RFPS are included for your review.

Respectfully,
Dr. Mark Stamm
Superintendent



ATTORNEYS AT LAW
PHONE 215.938.6378
FAX 215.938.6375

1800 BYBERRY ROAD
1301 MASONS MILL BUSINESS PARK
HUNTINGDON VALLEY, PENNSYLVANIA 19006

MICHAEL IRA LEVIN
PAUL J. CIANCI
DAVID W. BROWN
RICHARD B. GALTMAN
JAMES J. MUSIAL
CRAIG D. GINSBURG
JULIA A. LEVIN

OF COUNSEL
BRANDON EVANGELIST

February 16, 2026

Via Email

Mrs. Heather Burke, Board Secretary
East Lycoming School District
349 Cemetery Street
Hughesville, Pennsylvania
hburke@elsd.org

Re: Response to Request for Proposal—Legal Services

Dear Mrs. Burke:

Please accept this correspondence as Levin Legal Group, P.C.'s proposal for the provision of legal services to the East Lycoming School District ("ELSD"). I am pleased to respond on behalf of our firm and to share our extensive background and expertise in providing a wide range of high-quality legal services to school districts and educational entities across the Commonwealth of Pennsylvania.

Our firm concentrates its practice in representing school districts, intermediate units, vocational-technical schools, and community colleges in Pennsylvania, and we are proud of the reputation we have earned as one of the leading law firms in the area of education, civil rights and public employment law.

In addition to representing public school entities, our firm is General Counsel to such education-related entities as the Pennsylvania School Boards Association and the Pennsylvania Association of Elementary and Secondary School Principals. The firm also is on the approved defense counsel panels of the major insurers of public school entities, including Church Mutual Regent and AIG/Chartis (formerly known as National Union Fire Insurance Company).

I. Experience

Given the nature and focus of our practice, we are uniquely positioned to meet the full spectrum of legal needs of ELSD as described in the RFP in a comprehensive, seamless, and highly responsive manner. Unlike firms that treat school law as an ancillary service line or a narrow sub-practice within a broader general practice, our firm's work is fundamentally and primarily dedicated to serving public school entities. This singular focus allows us to deliver depth of expertise, practical insight, and continuity of service across all legal domains that affect school operations, governance, and compliance.

Our day-to-day practice encompasses advising and representing school entities on virtually every aspect of school law and educational operations, including, but not limited to: internal and external investigations; student discipline and due process; employee discipline and professional staff matters; transportation obligations and contracting; food services procurement and contracting; charter school matters; education of homeless students; development and implementation of individualized education programs (IEPs); truancy and absenteeism enforcement; Title IX compliance; child abuse reporting and compliance obligations; home education and private tutoring matters; construction, procurement, and licensing contracts; labor relations; labor arbitrations; collective bargaining; and related regulatory and operational issues.

In addition to active representation, our firm has made substantial contributions to the development of school and municipal law in Pennsylvania. We authored *Municipal Liability in Pennsylvania* for the Pennsylvania Bar Institute, now in its 8th Edition. We also co-wrote Chapter 15 of the State Board of Education regulations governing services to students with disabilities who do not qualify for special education under the IDEA. Our labor arbitration practice reflects a strong and consistent record of success, and in the area of charter school law, we have been at the forefront of its development in Pennsylvania, maintaining a robust and highly respected practice. We are also frequent presenters at regional and statewide conferences on school law, including special education, Section 504, and broader compliance and governance issues.

I have written and continue to edit the three principal reference manuals relied upon by school attorneys throughout Pennsylvania: (1) *Pennsylvania School Laws and Rules, Annotated*; (2) *United States School Laws and Rules*; and (3) *Pennsylvania School Personnel Actions*. In addition, I authored the comprehensive chapter on *Schools, Colleges and Universities in West's Legal Forms*, West Publishing's premier national form encyclopedia. Together, these publications reflect both the depth of our subject-matter expertise and our long-standing leadership role in the field of school law.

II. Qualifications & Firm Overview

I would serve as lead attorney for this engagement and act as ELSD's primary point of contact. All questions regarding this proposal may be directed to me.

All attorneys in our firm are members in good standing of the Pennsylvania Bar and are admitted to practice before various state and federal courts. Collectively, our attorneys bring more

than 75 years of experience providing comprehensive legal services to public school entities across every major area of school law. I have worked with public school entities for more than 40 years, and the firm's other shareholder, Paul J. Cianci, has represented public school entities for more than 15 years. Each attorney in our firm has substantial experience across multiple domains of school law, allowing us to provide both depth and continuity of service.

As described in Section I, our firm's practice is focused almost exclusively on representing public school entities. In many respects, we function as an external "Office of General Counsel" for numerous public and private educational institutions throughout Pennsylvania. In addition, we are regularly appointed as insurance defense counsel for school entities and their officials and employees, representing them in a wide range of state and federal litigation, including but not limited to civil rights claims, sexual harassment claims, whistleblower actions, defamation claims, school funding disputes, charter school litigation, and related matters. In addition, we have extensive experience in handling all student-related issues in the public school context, including discipline matters, admissions, attendance, special education, and religious considerations.

Enclosed with this correspondence is the firm's resume, which includes biographical information for all attorneys. While all attorneys in the firm are available to provide services to ELSD as needed, it is anticipated that the majority of services would be provided by Paul and me, ensuring consistency, accountability, and continuity of representation.

III. Representative Experience

Over the past five years, our firm has performed extensive work for school districts and intermediate units across Pennsylvania, including:

(1) Special Education Representation

We have represented scores of public school entities in hundreds of special education matters at all stages, from pre-litigation through due process hearings and appeals to federal court. Representative clients include:

Coatesville Area School District
The School District of Philadelphia
Crestwood Area School District

(2) U.S. Department of Education Office for Civil Rights (OCR) Investigations

We regularly represent school districts in OCR investigations. In one matter, we obtained a favorable decision in a complex case involving alleged retaliation under Section 504 of the Rehabilitation Act and a district's statutory obligations under Pennsylvania's Child Protective Services Law. Our OCR representation spans matters involving special education placements, school closures, and Title IX compliance, among other regulatory issues. One of the Attorneys in the Firm, Craig Ginsburg, was employed by the United States Department of Education, Office of

Civil Rights, actively involved in the handling discrimination matters, including Title IX matters, coming before his office.

(3) Collective Bargaining and Labor Negotiations

We have successfully negotiated collective bargaining agreements for numerous public school entities, including:

- Coatesville Area School District (support and teachers' contracts)
- Shikellamy School District (teachers' contract and support contract)
- Pocono Mountain School District (support contract)
- Penn-Delco School District (teachers' and support staff contracts)
- Radnor School District (teachers' and two support staff contracts)
- West Shore School District (teachers' contract)
- York City School District (teachers' contract)
- Bensalem Township School District (teachers' contract)
- BLaST Intermediate Unit (teachers' contract)
- Morrisville Borough School District (teachers' and support contracts)

Each of these agreements was achieved within district parameters and without labor strikes.

In addition, in three instances, we successfully negotiated the right to subcontract out bargaining unit work, saving the Districts (Shikellamy, Coatesville and Pocono Mountain) substantial amounts of money.

(4) Labor and Employment Law

We have represented public school entities and intermediate units in hundreds of labor and employment matters, including arbitrations, negotiations, fact-finding proceedings, representation before state and federal labor relations boards, ADA interactive process matters, and related proceedings. Representative clients include:

- Coatesville Area School District
- Avon Grove School District
- Bensalem Township School District
- BLaST Intermediate Unit
- Downingtown Area School District
- Harrisburg School District
- The School District of Philadelphia

(5) EEOC and PHRC Representation

We routinely represent school entities before the Equal Employment Opportunity Commission and the Pennsylvania Human Relations Commission, handling matters from initial

charge filings through investigation, mediation, litigation, and trial in state or federal court when necessary. Representative clients include:

Central Bucks School District
Chichester School District
Neshaminy School District
Norristown Area School District
Bucks County Community College

(6) General Counsel Services

We provide daily advisory services to dozens of public school entities on the full range of education law issues, including student discipline and expulsions, home education, homeless student compliance, child abuse reporting, Section 504 plans and IEP development, booster club governance, board governance and policy development, Sunshine Act, the Right to Know Act, Robert’s Rules of Order, student rights, First Amendment issues, Section 1306 placements, alternative education programming, procurement compliance, and all other legal and operational issues encountered by public schools.

With the firm’s depth, staffing structure, and exclusive focus on school law, we are able to provide same-day responses on both emergent and routine matters. For ELSD, we are fully equipped to handle discrete matters from inception through resolution, while also providing ongoing general counsel support. ELSD would have access to the full resources of our firm and the benefit of each attorney’s specialized expertise, while maintaining consistent leadership and accountability through a clearly defined engagement structure.

IV. References

We are pleased to provide the following references, and we can readily provide other references upon request.

Name	Contact Information	Type of Services/Fees Charged	Dates Provided
Nathan Mains, CEO Pennsylvania School Boards Association	Address: 400 Bent Creek Blvd. Mechanicsburg, PA 17050 Phone: (717) 506-2450 Email: nathan.mains@psba.org	Outside counsel with the majority of services focusing on governance, policy and personnel matters	Since 1975

Name	Contact Information	Type of Services/Fees Charged	Dates Provided
Lynn Rauch, Esq., General Counsel and Elizabeth Gutman, Esq., Senior General Counsel The School District of Philadelphia	Address: 440 N. Broad Street, Ste. 313, Philadelphia, PA 19130 Phone: (215) 400-6742 (Rauch); (215) 400-5154 (Gutman) Email: lrauch@philasd.org (Rauch); egutman@philasd.org (Gutman)	Charter school, special education, litigation defense, construction and various other school law matters	Since 2010
Dr. Christina Steinbacher-Reed, Executive Director BLaST Intermediate Unit	Address: 2400 Reach Road Williamsport, PA 17701 Phone: (570) 323-8561 Email: creed@iu17.org	Labor and employment matters, collective bargaining and transactional work	Since 2010
Jeremy Winn, Superintendent Shikellamy School District	Address: Island Park Administration Center, 200 Island Blvd. Sunbury, PA 17801 Phone: (570) 286-3721 Email: winnj@shikbraves.org	Solicitor work – all legal matters affecting the school district	Since May 2019

Name	Contact Information	Type of Services/Fees Charged	Dates Provided
Dr. Nancy A. Rottler, Superintendent of Catholic Schools Diocese of Greensburg	Address: 723 E. Pittsburgh Street Greensburg, PA 15601 Phone: (724) 837-0901 Email: nrottler@dioceseofgreensburg.org	Outside counsel with the majority of services focusing on all types of student matters, employment disputes, contracts, and litigation	Since February 2023

V. Fee Proposal

We demonstrate our ongoing commitment to excellence in public education by offering all of our public school entity clients a substantially discounted regular rate. Our firm’s practice is to bill in increments of one-tenth of an hour, and to work with public school entities to monitor costs as necessary during the term of the engagement. Our experience has largely been that costs can be effectively mitigated when the client and its employees are responsive and provide all relevant information in a timely manner. Identifying further efficiencies that can generate cost savings can be typically identified during the course of an engagement.

Rate	Attorneys
\$230/hour	Levin, Cianci (Shareholders) and Evangelist (Of Counsel)
\$210/hour	Brown, Galtman, Musial, Ginsburg, Julia Levin (Associates)

We do not charge for support staff, regular postage, facsimiles, computer-assisted research, or similar items. We use Westlaw, but we are happy to use any LEXIS identification number you provide for research related solely to ELSD matters. We do charge for certain, actual out-of-pocket expenses such as filing fees, overnight or express mail, witness fees, expert fees, overnight travel, in-house copying at the rate of \$0.10 per page, large copying jobs outside the firm, courier services, and court stenographers. These items will be charged at actual cost, without additional mark-up. With respect to travel time, we charge fees portal to portal.

VI. Miscellaneous Requirements

- All terms and conditions in the RFP are accepted by the firm.
- We welcome the opportunity to meet with ELSD representatives for an interview in conjunction with this RFP.
- While I will be the lead attorney for this engagement, I intend to work in collaboration with my partner, Paul J. Cianci. Mr. Cianci would be the attorney in our firm who will normally attend monthly School Board meetings and executive sessions.
- The firm requires a contract in addition to that requested by the ELSD—an engagement letter—a sample of which is enclosed with this letter.
- As for pending or past legal actions involving the firm or assigned attorneys within the last ten years, two adverse parties tried suing attorneys in our firm during that period, and they had no success in either case.

On behalf of our attorneys, we look forward to the opportunity to work in collaboration with the ELSD. Please feel free to contact me if you have any questions or would like any additional information.

Very truly yours,

LEVIN LEGAL GROUP, P.C.

/s/ Michael I. Levin

Michael I. Levin

Enclosures

- Sample Engagement Letter
- Firm Resume and Attorney Biographies



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FAX 215.938.6375

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1301 MASONS MILL BUSINESS PARK
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JAMES J. MUSIAL
CRAIG D. GINSBURG
JULIA A. LEVIN

OF COUNSEL
BRANDON EVANGELIST

SAMPLE DRAFT

February 16, 2026

East Lycoming School District
349 Cemetery Street
Hughesville, Pennsylvania

Re: Engagement with the East Lycoming School District

Dear [Board President]:

We are pleased to submit this letter which summarizes our relationship with the East Lycoming School District (“ELSD”) as legal counsel. The following paragraphs describe our understanding of the terms and objectives of our engagement as legal counsel for the ELSD and the nature and scope of the services we will provide.

Our Responsibilities and Services.

We will provide those legal services that the ELSD requests us to provide and that we agree to provide, which may include the following:

- Attendance at meetings, including executive sessions and committee meetings;
- Advising the administration or board of material information consistent with our duties representing the ELSD;
- Investigation of facts for the purpose of rendering legal advice;
- Issuance of opinion letters;
- Preparation of contracts, requests for proposals and invitations to bid;

- Preparation of legal notices;
- Preparation of resolutions necessary for the business and affairs of the ELSD;
- Preparation of grant applications;
- Review and/or preparation of policies or administrative guidelines;
- Representation of the ELSD in adversarial proceedings;
- Providing legal advice and recommendations with respect to issues and matters brought to our attention, including such matters as governance, finance, property, employees, liability, construction, litigation, contracts, civil rights, and applicable law, regulations and ordinances;
- Working with and cooperating with other legal counsel that may be retained by the ELSD;
- Working with and cooperating with other professionals retained by the ELSD, including architects, financial advisors and construction managers;
- Negotiating contracts, administrative compensation plans, or collective bargaining agreements;
- Providing legal seminars or training to the board, administration, or staff;
- Providing summaries of contracts or insurance policies;
- Reviewing new legislation and reporting on requirements any such legislation may impose upon the ELSD;
- Conducting legal audits of one or more of ELSD's practices and/or policies; and
- Such other services that may be requested or required from time-to-time by the ELSD.

For purposes of assignments to us, we may rely upon any request by any "Authorized Representative." For purposes of this engagement letter, "Authorized Representative" means and includes each individual who (i) is expressly designated orally, electronically or in writing or otherwise by the ELSD to act on behalf of the ELSD with respect to one or more services, (ii) actually acts on behalf of the ELSD with respect to any services, or (iii) has apparent authority to act for the ELSD, by course of dealing or otherwise with respect to any services.

With respect to adversarial proceedings for which we are requested by you or your insurance carrier to represent you or any of your officials or employees (hereinafter referred to collectively or individually as "you"), we will represent you within ethical and professional standards; and, unless instructed otherwise by you, and we will take all action that we believe is

necessary and reasonably calculated to advance your interests. We will file such pleadings, motions, applications, petitions, and appeals as are necessary to advance or protect the ELSD's interests, unless instructed otherwise by appropriate authority. You agree that we may take such actions.

We will provide the services that you request and that we agree to provide in accordance with the professional standards to advance the interests of the ELSD, subject to the following understandings:

1. We will not perform services that we have not been asked to perform;
2. When performing our services under this engagement, we will rely on the facts provided to us by you and will not undertake an independent investigation of the facts unless specifically requested to do so by you;
3. We will advise you if a particular service cannot be provided because we do not believe that we have sufficient competency in the applicable area of the law;
4. We will not provide services where we may be prohibited from providing such services in accordance with the Rules of Professional Responsibility due to such things as a conflict of interest that might exist with respect to a particular matter; and
5. When negotiating a contract on behalf of the ELSD, we will always seek to obtain provisions that are commercially reasonable, unless instructed otherwise by the ELSD.

In all instances, we will comply with the Pennsylvania Rules of Professional Responsibility and other applicable law and in all instances we will be acting in the capacity as legal counsel for the ELSD.

ELSD's Responsibilities

ELSD is responsible for making all records and related information available to us and for the accuracy and completeness of that information. This responsibility includes the establishment and maintenance of adequate records and internal controls, including monitoring ongoing activities, the selection and application of practices and policies, and document retention and retrieval practices. The ELSD is responsible for correcting any incorrect information that may have been provided to us. The ELSD agrees to bring to our attention any matters that may reasonably be expected to require further consideration to determine the proper treatment and handling of matters we are handling. The ELSD also agrees to bring to our attention any changes in the information as originally provided to us as soon as such information becomes available.

The ELSD is responsible for the design and implementation of programs, practices, policies, protocols and controls to prevent violation of law. In addition, the ELSD is also responsible for identifying and ensuring that it complies with applicable laws and regulations and advises us if it has knowledge of any situation related to our services that does not comply with applicable law. Further, we will assume that the ELSD has taken action to implement our recommendations unless the ELSD has advised us differently.

The ELSD is responsible for notifying us when it decides not to carry out our recommendations or when not carrying out or implementing our recommendations in the way that we advise. Such notification shall be in writing. The ELSD is also responsible for asking us if it has any questions about our recommendations, if it desires to explore options for the handling of any matter, or if it wants a description of the pros and cons of proceeding in a particular manner.

Litigation Hold. We wish to remind you that the ELSD has certain responsibilities to preserve evidence with respect to administrative and judicial proceedings. In this regard, the ELSD has a duty to preserve and protect any and all paper and electronic records, documents and other evidence (hereinafter referred to individually or together as “evidence”) that may be relevant to any existing or future litigation once you know or reasonably should know that litigation exists or will be filed. This includes arbitration, administrative proceedings and court proceedings of any nature. Evidence includes paper documents and records and all forms of electronic evidence, including text messaging, IM, emails, social media, etc. The obligation includes keeping and maintaining electronic records and files in their electronic form without change. If the ELSD fails to keep and safeguard evidence that is or may be relevant or that may lead to relevant evidence, the ELSD and involved employees and officials may be subject to sanctions, which can be severe.

Engagement Administration

As engagement partner, I will be responsible for supervising the engagement and the work performed by us.

The ELSD will provide us access to personnel of the ELSD, as necessary, to enable us to perform our work. We will ask that your personnel, to the extent possible, provide the necessary records and data to enable us to do our work. We may have to have meetings or access to records to perform our services properly and the ELSD will provide those items to us.

Auditing standards generally accepted in the United States of America require that we communicate certain matters related to the conduct of our services to your auditors. It is understood that our communication with your auditors is part of the services that we are required to provide. In addition, there are certain matters that might require our disclosure of the information to the board of directors, such as willful violations of legal requirements that are material; serious difficulties that we encountered in dealing with management related to the performance of our services; any disagreements with management, whether or not satisfactorily resolved, about matters that individually or in the aggregate could be significant to the consolidated financial statements or our report; major issues that were discussed with management in connection with

our services; and other matters as considered necessary or required to be communicated under professional standards.

Scope of Our Work

With respect to those services that you request us to perform and that we expressly agree to perform, we will consult with you about your objectives, and, when appropriate, the means of achieving them in accordance with applicable law and the ethical rules governing lawyers. We shall endeavor to keep you advised of the status of your matter to the extent necessary to enable you to make informed decisions. We will provide competent representation of your interests. Expressions on our part concerning the probable outcome of our representation will reflect our best professional judgment, but are not guarantees, as they are limited by our knowledge of the facts and are based on the state of the law at the time that they are expressed. There may be many factors that affect the outcome of any matter and over which we have no control—such as the recollection or testimony of any particular witness.

Our work, opinions and deliverables will be based on our interpretation of applicable federal and state laws, regulations, administrative and judicial pronouncements, and other relevant authorities (hereinafter referred to as “applicable law”), in effect when we provide our work, opinions or other deliverables. All of these authorities are subject to change, and such change may be retroactive or prospective in effect. We assume no responsibility to either advise you or to update our work, conclusions, or deliverables for changes in respect to federal and state laws, regulations, administrative and judicial pronouncements, and other relevant authorities. Stated another way, we assume responsibility for our work when our work is performed, but we assume no responsibility for changes in applicable law after our work is performed.

Aspects of Third Party Payor Engagements

Examples of Third Party Payor engagement include those undertaken pursuant to a policy of insurance or because another company or person has agreed to pay the legal fees and costs on your behalf. In such a situation, the firm will represent you solely with regard to covered claims (that is, claims for which the insurer or other payor has agreed to advance fees and costs) and subject to any reservation of rights letter from the payor. In the event that a dispute arises between you and the payor regarding the payor’s obligations to you or any other matter, we will not be able to represent you in that dispute, nor will we be able to represent the payor in any such dispute. If we become aware of a possible dispute regarding the payor’s obligations to you, we will notify you of that fact so that you may seek separate counsel as to that matter.

You should understand that we may be required to make regular report to the payor concerning the engagement. Such reports may include information regularly developed in the course of the engagement, unless for some reason you specifically instruct us not to forward some confidential information to the payor. Such an instruction may, depending on the terms of the agreement between you and the payor, affect the payor’s obligations to indemnify you or to pay your legal fees and costs.

You waive any privilege so as to allow us to provide the information requested or required to such payors.

Aspects of Multiple Client Engagements

It is unusual that we will be asked to represent multiple clients in a particular matter involving the ELSD. However, if the situation arises and we are asked to represent a number of clients as a group, including you, we recommend that each client consult separate counsel to represent that client's individual interests with respect to the client's individual current or potential issues. We particularly urge you to consult separate counsel concerning any matter in which you perceive that your interests may conflict with the interests of other clients. We also expect and encourage you to consult with such individual counsel at any time and on any matter on which you wish to receive specific and individually tailored advice. We will provide information regarding the engagement to such individual counsel as part of our services to the group. We also expect that any such counsel will assist in identifying conflicts that may arise in the course of our work and will inform us appropriately, and we will advise such member of the group of clients with respect to such conflicts. Our work in this type of engagement is to represent all of the members of the group as a group collectively. Consequently, we will not promote or advocate the interests of any one or more members of the group individually. There may be issues related to a group engagement that would affect one or more members of the group differently due to unique circumstances of which we may or may not be aware, and where conflicts or disparate interests arise, it may be necessary or appropriate for any of the members of the group to engage separate counsel on an individual basis. While we will try to explain the significance and effect of the material issues to all clients in the group, we may not know facts specific to any one member of the group. And may not realize that such explanations might be warranted in particular circumstances. We will, however, endeavor to keep all clients in the group informed on a regular basis about our work for the entire group of clients.

Document Retention

It is our policy to keep records electronically and that such electronic records related to this engagement will be retained for three (3) years after the completion of a matter. We do not keep any original ELSD documents; therefore, if you desire that we return the original records to you, we will be pleased to do so. When records are returned to you, it is your responsibility to retain and protect your records for possible future use, including potential examination by any government or regulatory agencies. You agree that upon the expiration of the three year period, we shall be free to destroy any records related to this engagement.

Engagement Fees

We demonstrate our ongoing commitment to excellence in public education by offering all of our public school entity clients a substantially discounted regular rate. Our firm's practice is to bill in increments of one-tenth of an hour, and to work with public school entities to monitor costs as necessary during the term of the engagement. Our experience has largely been that costs can be effectively mitigated when the client and its employees are responsive and provide all relevant

information in a timely manner. Identifying further efficiencies that can generate cost savings can be typically identified during the course of an engagement.

Rate	Attorneys
\$230/hour	Levin, Cianci (Shareholders) and Evangelist (Of Counsel)
\$210/hour	Brown, Galtman, Musial, Ginsburg, Julia Levin (Associates)

We do not charge for support staff, regular postage, facsimiles, computer-assisted research, or similar items. We use Westlaw, but we are happy to use any LEXIS identification number you provide for research related solely to ELSD matters. We do charge for certain, actual out-of-pocket expenses such as filing fees, overnight or express mail, witness fees, expert fees, overnight travel, in-house copying at the rate of \$0.10 per page, large copying jobs outside the firm, courier services, and court stenographers. These items will be charged at actual cost, without additional mark-up. With respect to travel time, we charge fees portal to portal.

Attorneys newly hired by us will be placed on the appropriate fee tier taking into account their experience level. In addition, attorneys identified above may be increased in their tier assignment.

We are approved defense counsel for a number of insurance carriers that have rate agreements with us that may vary from the rates above. When we work on a matter that is covered by such insurance, we will comply with applicable litigation guidelines and billing arrangements which may differ from those set forth above.

Other Engagement Matters and Limitations

(a) Management Functions

We will not perform management functions or make management decisions on your behalf. We will, however, provide advice and recommendations to assist management or the board, as applicable, in performing their respective functions and making decisions.

(b) E-mail

During the course of our engagement, we or you may need to transmit confidential information electronically to each other and to other entities engaged by either party. E-mail is a fast and convenient way to communicate. However, e-mail is not a secure means of communication and, thus, confidentiality could be compromised. You agree to the use of e-mail and other electronic methods to transmit and receive information, including confidential information, between us and outside specialists or other entities engaged by either you or us.

Although e-mail is an efficient method of communication, it is not necessarily a fool-proof method. For a variety of reasons, an e-mail may not be received or posted to an inbox. It could, for example, end up in a junk mail folder. It may be inadvertently deleted. We therefore cannot take assignments by exclusively by email. If there is anything that you need us to do, you need to talk to speak with one of us directly and ensure that we have notice of what you want us to do for you. Unless we specifically respond to an email, you may not assume that we received the email or will take action pursuant to it. The disclaimers in this paragraph are intended for your protection as well as our protection. We want to avoid any possibility that an assignment or request is missed because of the shortcomings of email.

(c) Contract Forms and Recommendations

No contract form or generic contract should be utilized for any particular transaction without the advice of counsel. Changes or modifications may have to be made to address individual circumstances or changes in the law with regard to a particular transaction. A contract prepared by us for a particular transaction shall not be used for another or different transaction without first consulting with counsel and making necessary or appropriate changes or modifications. Renewals of contracts should not be undertaken without first determining whether changes in the law or changed circumstances may require changes or modifications to the contract.

(d) Disputes

You agree that any dispute regarding this engagement will, prior to resorting to litigation, be submitted to mediation upon written request by either party. Both parties agree to try in good faith to settle the dispute in mediation. The American Arbitration Association will administer any such mediation in accordance with its Commercial Mediation Rules. The results of the mediation proceeding shall be binding only if each of us agrees to be bound. We will share any costs of mediation proceedings equally.

(e) Limitations on Damages and Indemnification

Except to the extent finally determined to have resulted from the willful misconduct or fraudulent behavior of Levin Legal Group, relating to the services it has provided, the ELSD agrees to indemnify, defend and hold harmless Levin Legal Group and its attorneys from and against any and all liabilities incurred or suffered by or asserted against Levin Legal Group or any of its attorneys in connection with any third party claims to the extent such assertions, claims or liabilities relate to the work or services performed by Levin Legal Group for or on behalf of the ELSD. The terms of this provision shall apply regardless of the nature of any claim asserted (including, but not limited to, contract, tort, or any form of negligence or intentional act), but these terms shall not apply to the extent finally determined to be contrary to applicable law or regulation. These terms shall also continue to apply and shall survive termination of this agreement or termination of the services of Levin Legal Group. This paragraph does not apply to any claims that the ELSD may have against Levin Legal Group.

(f) Legal Actions

The ELSD accepts and acknowledges that any legal proceedings by the ELSD arising from or in connection with the services provided by the Levin Legal Group under this Agreement or engagement must be commenced within one (1) year from the date the services were performed, without consideration as to the time of discovery of any claim.

(g) Miscellaneous

If any provision of this agreement is declared invalid or unenforceable, no other provision of this agreement is affected, and all other provisions remain in full force and effect.

This engagement letter represents the entire agreement regarding the services described herein and supersedes all prior negotiations, proposals, representations or agreements, written or oral, regarding these services. It shall be binding on heirs, successors, and assigns of you and us. If the foregoing is in accordance with your understanding, please sign the enclosed copy of this letter and return it to us. If you have any questions, please let us know.

We appreciate the opportunity to be your attorneys, and we trust that our association will be a long and pleasant one.

Very truly yours,

LEVIN LEGAL GROUP, P.C.

DRAFT

SAMPLE DRAFT

This letter correctly sets forth the understanding of the East Lycoming School District.

ACCEPTED:

By _____

Title _____

Date _____

Levin Legal Group
A Professional Corporation
1301 Masons Mill Business Park
1800 Byberry Road
Huntingdon Valley, PA 19006
Phone: (215) 938-6378

Introduction

LEVIN LEGAL GROUP, P.C., is a small but aggressive firm, providing legal services to individuals, governmental entities, insurance companies, associations and corporations seeking quality legal services within conservative budgetary constraints. Concentrating in civil litigation, labor and employment law, civil rights litigation, municipal liability and public school law, our attorneys routinely demonstrate their expertise and success in these areas of law and consistently provide clients with personalized attention to details. We are proud to count as our clients numerous school districts and other public school entities and companies such as the Pennsylvania School Boards Association. We also perform defense work for AIG, ACE, CM Regent, Liberty Mutual and self-insured school districts, such as the School District of Philadelphia.

Our mission is to improve the legal affairs of those we serve through our commitment to excellence. Our goal is to offer quality services that exceed our clients' expectations in a professional, convenient, cost-effective, and accessible manner. To accomplish this, we take seriously what we believe are our duties to be well informed, to think, to listen, and to ask questions. We consult those who will be affected by our actions in advance. We communicate openly and without ambiguity. We act honestly, fairly, and consistently.

School Law. Our attorneys devote considerable attention to the affairs of school districts and other public school entities across the Commonwealth, representing them in all aspects of their operations, including: special education, labor and employment, student issues, construction, purchasing, and taxation. Our firm is General Counsel to the Pennsylvania School Boards Association and the Pennsylvania School Boards Association Insurance Trust. We believe we have earned the respect of our colleagues in the legal community for our expertise in school law, as our attorneys regularly present on school law topics at seminars accredited by the Supreme Court of Pennsylvania.

Labor & Employment Law. We are proud of our firm's reputation. Beyond the firm's extensive experience in successfully negotiating collective bargaining agreements for public and private sector clients, our attorneys appear before both the National Labor Relations Board and the Pennsylvania Labor Relations Board in unfair labor practice proceedings. We regularly defend against discrimination claims brought under such laws as the Age Discrimination in Employment Act, Title VII of the Civil Rights Act of 1964, and the Americans with Disabilities Act. As a result, we are quite familiar with the procedures of the Equal Employment Opportunity Commission, the Pennsylvania Human Relations Commission, and state and federal courts with respect to discrimination cases. One of the many advantages we offer our clients is the knowledge of how to apply the unusual rules pertaining to the shifting burdens of proof in such cases.

Insurance Counsel & Risk Management. We act as counsel to a major insurance program providing risk management and insurance service protection to Pennsylvania’s public school entities. We have deftly guided the Pennsylvania School Boards Association Insurance Trust and its related entities through the complex maze of laws and regulations governing insurance, agents and brokers, claims administration, and pooling of risks, negotiating the contracts necessary for ensuring that these programs can function effectively for the entities that wish to participate in them.

Critically important for our clients, as panel counsel for insurance carriers and self-insured programs, our attorneys regularly appear in federal and state courts to defend a multitude of actions, including civil rights matters, contract claims and tort actions. In fact, some of our cases have garnered national attention and others have been cases of first impression before the courts—meaning that we have found ourselves shaping the evolution of the law through our advocacy on behalf of our clients.

Beyond Litigation. Our commitment to serving our clients’ individualized needs goes well beyond handling matters that are in or on the verge of litigation. We offer a wide array of services tailored to meet the unique needs of each client. This includes in-service training, policy development, preparation of job descriptions and essential function listings for purposes of the Americans with Disabilities Act, reviews of employee selection procedures, and related services. We keep our clients apprised of significant developments in our practice areas so that they can always stay ahead of the curve.

Moreover, we have made a commitment in our firm to improving our services to clients and friends through technology. We are, for example, a paperless office. While our attorneys are all readily accessible by email—if that is a client’s preferred method of routine communication—the firm also strives to stay on the cutting edge of technology to continuously improve our levels of service. For example, Michael Levin is the founder E-Forms, Inc., doing business as www.sureforms.com, which provides employers and school districts with forms designed to insure compliance with legal requirements.

Leadership in Our Field. We have been recognized as a leader in the fields of law in which our attorneys practice, and we worked hard to earn that recognition. In addition to the frequent lectures and seminars we give for our clients and colleagues—on the local, statewide, and national levels—our attorneys have published a variety of books and articles. Our publications include: *Municipal Liability in Pennsylvania: An Analysis of the Political Subdivision Tort Claims Act*, *School Personnel Actions*, *United States School Laws and Rules*, *Pennsylvania School Laws and Rules*, and the *Chapter on Colleges, Universities, and Schools in West’s Legal Forms*.

Attorneys in the Firm

Michael I. Levin

Shareholder

Mike formed his firm in 1994 after 14 years as a partner and 5 years as an associate with Cleckner and Fearen. He believes in a hands-on approach to the practice of the law and closely monitors the activities of the personnel in the firm. The practice of the law has been rewarding to him and he has given back to the profession in numerous ways. For example, he has authored and edited four books--*Pennsylvania School Personnel Actions*; *United States School Law and Rules*; *Municipal Liability in Pennsylvania* and *Pennsylvania School Laws and Rules*. He has authored the chapter on *Schools, Colleges and Universities* in West's Legal Forms encyclopedia. He has assumed positions of leadership in professional associations, having served on the Board of Directors of the National Council of School Attorneys and moving through the chairs of the Education Section of the Pennsylvania Bar Association. He is a frequent lecturer at statewide and national seminars. He has been quoted in such national publications as *U.S. News and World Report* and the *National Review*.

Mike has been named a *Pennsylvania Super Lawyer* in the Schools & Education practice area by the publishers of *Philadelphia* magazine, *Pennsylvania Super Lawyers* and *Law & Politics*, every year since 2005.

Admitted to Bar in Pennsylvania in 1975. Education: Temple University, B.A. 1972; Dickinson School of Law J.D. 1975. Member of the Editorial Staff of the Dickinson Law Review. Member: American, Pennsylvania and Montgomery County Bar Associations; National Council of School Attorneys.

Paul J. Cianci

Shareholder

Paul joined the firm in 2010 as an experienced litigator having handled all aspects of complex commercial litigation matters in various state and federal trial and appellate courts. In addition to his trial experience, Paul was employed by KPMG and the Law Department of the City of Philadelphia, where he represented his clients in various aspects of state and local tax matters.

Paul is an accomplished litigator, counselor, and advisor to public- and private-sector education entities across Pennsylvania. With more than two decades of legal experience, Paul has built a reputation as a trusted, strategic advocate in education law, employment disputes, discrimination matters, civil-rights litigation, and charter-school controversies.

Paul represents school districts, charter schools, and independent schools, including the Greensburg Diocese, in federal and state courts at both trial and appellate levels. His practice spans civil-rights litigation, employment matters, Title VI and Title VII disputes, ADA and Title IX claims, employee discipline, constitutional issues, and a broad array of student-services and special-education matters. He also regularly represents school entities before administrative agencies, including the Pennsylvania Human Relations Commission, the EEOC, the Pennsylvania Department of Education, and the Commonwealth's Charter School Appeal Board.

Beyond litigation, Paul provides day-to-day counsel to school entities on governance,

procurement, student services, special education, and transactional matters. His clients rely on his practical judgment, thorough preparation, and deep knowledge of the statutory and regulatory frameworks governing Pennsylvania's public schools.

A graduate of the Villanova University Graduate Tax Program (LL.M. in Taxation), Paul earned his J.D. from Widener University School of Law while working full time as a paralegal, demonstrating the discipline and work ethic that continue to define his professional career. He holds a B.A. in History with minors in English and Theater from the University of Scranton.

He is admitted to practice in Pennsylvania and New Jersey, as well as before the U.S. District Courts for the Eastern and Middle Districts of Pennsylvania and the U.S. Courts of Appeals for the Third and Ninth Circuits.

David W. Brown

Associate

Dave joined the Levin Legal Group in April 2012 after previously working with the firm in 2009-2010. Since returning, he has handled a variety of matters including successfully representing clients in contract disputes and employment litigation before school boards, the PHRC, the EEOC, and state and federal courts; conducting internal investigations; and providing legal advice on compliance with state and federal laws and regulations. Dave's legal background is diverse, having previously worked for two major Philadelphia law firms: Dechert LLP, where he handled class-action securities cases and mass tort litigation, and Drinker Biddle & Reath LLP,

where he successfully represented some of the nation's top life insurance companies in courts across the United States. Dave has also represented several pro bono clients in Philadelphia's Municipal Common Pleas courts, as well as assisting disadvantaged youths through the Support Center for Child Advocates.

Dave grew up in Ambler, Montgomery County, graduating from Wissahickon High School in 1987. He received his bachelor's degree in 1991 from the University of Southern California, with a double major in history and broadcast journalism. After graduation, Dave worked for newspapers and radio stations in Pennsylvania, California and New Jersey for more than 10 years. In 2005, he graduated cum laude from the University of Pennsylvania Law School, while also earning a certificate in business and public policy from Penn's Wharton School of Business. Dave currently resides with his wife and four children in New Jersey.

Richard B. Galtman

Associate

Richard joined the firm in April of 2014 as an experienced labor attorney having practiced for over 23 years, the last 17 years of which have been spent primarily representing public sector clients, and more particularly, school districts and intermediate units. Richard has served as chief negotiator in collective bargaining and has advised and represented numerous school clients in mediation, grievance and interest arbitration, fact-finding hearings, administrative hearings (NLRB, PLRB, EEOC and PHRC), dismissal hearings, litigation and appellate matters. He has also served as solicitor and general counsel to

numerous school districts and intermediate units.

Richard is a member of the Pennsylvania Bar. He obtained his B.A. from LaSalle University in Business Administration in 1985, and his J.D. from the Boston University School of Law in 1988.

James J. Musial

Associate

Jim joined the firm in January 2015 after working for more than a decade at a suburban law firm concentrating mainly on municipal law and general litigation matters in Bucks and Montgomery counties. Jim concentrates most of his practice on civil litigation and legal compliance issues for various school districts. He has tried multiple cases in the state and Federal courts and has resolved numerous other disputes through Court-affiliated or private arbitration.

During law school, Jim served as Executive Editor of the Temple Environmental Law & Technology Journal, and following graduation authored a First Amendment article appearing in the Temple Political and Civil Rights Law Review. Jim served as a law clerk to the Honorable Calvin E. Smith of Berks County, Pennsylvania. He also worked for several years in Philadelphia focusing on the defense of commercial motor vehicle and premises and product liability cases and assisted in the handling of commercial insurance coverage disputes. Jim also served as local counsel in Pennsylvania and New Jersey Courts for a national institutional services company.

Jim is a member of the Pennsylvania and New Jersey Bars. He obtained his B.A., cum laude, from Temple University, and his J.D., cum laude, from the Temple University School of Law.

Craig D. Ginsburg

Associate

Craig has worked for Levin Legal Group, P.C. for over 10 years. While at the firm, he has handled a wide variety of litigation, including student, employment and commercial matters on behalf of colleges, universities, intermediate units, school districts, and private schools throughout the Commonwealth of Pennsylvania. He has successfully represented clients in state and federal litigation. He has extensive experience in litigating at the administrative, trial and appellate levels having represented clients in the U.S. Equal Employment Opportunity Commission, Pennsylvania Human Relations Commission, state and federal trial courts and state and federal appellate courts. Craig's work at the firm includes representing plaintiffs in employment cases.

Craig brings to his work a diverse set of legal experiences, which include serving in the following roles: Supervisory Attorney at the U.S. Department of Education's Office for Civil Rights overseeing a group investigating civil rights complaints against schools in a five-state region; litigator at a law firm representing colleges and universities in employment and student matters and clients in commercial disputes; Deputy City Solicitor for

the City of Philadelphia handling administrative, trial and appellate level tax litigation; and plaintiff class action attorney in large class action matters.

Craig is a graduate of the University of Maryland, with a B.A. in English. He obtained his J.D. in 1989 from Temple University Law School. He is licensed to practice in Pennsylvania, New Jersey, and numerous federal district courts and circuit courts.

Julia A. Levin

Associate

Julia represents public and private schools in a broad range of education law matters, including employment discrimination, employee benefits, civil rights, labor law, and compliance issues. Her practice includes representing school clients in administrative proceedings and in state and federal courts, where she has successfully obtained summary judgment, including in Section 1983 matters. She has experience advising on Title IX matters and investigations involving allegations of systemic discrimination, and regularly drafts and revises school policies, student handbooks, and a variety of education-related contracts, including service agreements.

In 2010, Julia joined the Levin Legal Group, where she has practiced for the majority of her career. For a period of time, she practiced law with a small firm in New York, focusing on estate planning and commercial and residential real estate matters.

Before entering the legal profession, Julia was a certified high school mathematics teacher in a public school in the suburban Philadelphia region. Her background as an educator provides her with a practical understanding of school environments and informs her approach to advising school administrators and educational institutions.

In 2001, Julia graduated from Barnard College, Columbia University, *cum laude*, with a B.A. in Economics and Mathematics. In 2003, she obtained an M.A.Ed., with distinction, from Arcadia University. She earned her J.D. from Brooklyn Law School in 2009, and in 2010, she graduated with an LL.M. in Taxation from Villanova University School of Law.

Julia is admitted to practice in Pennsylvania, New Jersey and New York.

Brandon Evangelist

Of Counsel

Brandon Evangelist is a Partner at Goldberg, Miller & Rubin, P.C., and he is Of Counsel to Levin Legal Group. He brings over a decade of civil litigation experience throughout the Greater Philadelphia area. He represents individuals, healthcare networks, and employers in complex litigation matters, including medical malpractice, general liability, employment disputes, and motor vehicle cases.

Brandon is involved in all phases of litigation—from pre-suit investigations to trial—and is frequently called upon to provide

strategic counsel in both state and federal court.

His practice includes the defense of hospitals and higher education institutions in a wide range of matters, such as contract disputes, disciplinary hearings, allegations of excessive force, assault and battery claims, and construction-related litigation. His employment practice includes Title IX investigations, Human Resources investigations, and providing timely and effective advisory opinions.

In addition, Brandon has defended hundreds of motor vehicle cases in arbitration hearings and in jury trials and is regarded as an authority on automobile-related legal issues.

Before joining GMR, Brandon practiced at a regional litigation firm where he defended healthcare providers in medical and dental malpractice actions throughout the Philadelphia region.

Outside of his practice, Brandon enjoys spending time with his children, staying active through exercise and golf, and taking trips to the Jersey Shore. He is also a dedicated supporter of Philadelphia's sports teams.

Brandon is admitted to practice in Pennsylvania and New Jersey, and he is a member of the Pennsylvania and Philadelphia Bar Associations. He is a graduate of Pennsylvania State University (B.A.) and Villanova University School of Law (J.D.).

February 13, 2026

ORIGINAL

VIA EMAIL: hburke@elsd.org

East Lycoming School District
c/o Mrs. Heather Burke, Board Secretary
349 Cemetery Street
Hughesville, PA 17737

Re: Solicitor Proposal

Dear Board of School Directors:

I am writing on behalf of McNerney, Page, Vanderlin & Hall in response to your request for a proposal to serve as solicitors for the East Lycoming School District Board of School Directors.

McNerney, Page, Vanderlin & Hall (“McNerney, Page”) has been serving its clients since 1939. The firm has many decades of experience serving as school district solicitors, municipal solicitors, county solicitors, authority solicitors, and representing public sector organizations and entities generally. Our public sector attorney rate is \$195.00 per hour for general representation for all attorneys, and \$200.00 per hour for labor representation for all attorneys. Our public sector paralegal rate is \$135.00 per hour. We charge for all travel, time, and expenses.

The following information about McNerney, Page, our clients and our qualifications to serve as solicitors for the East Lycoming School District (the “District”) Board of Directors is organized according to the proposal requirements set forth in the District’s Request for Proposal (“RFP”) dated January 16, 2026.

1. Background information on the law firm/attorney(s) to be assigned to the District, including legal education, date of bar admission, and legal practice areas.

The attorneys who will be assigned to the engagement include the undersigned, David T. Sterngold, Esquire, Thomas C. Marshall, Esquire and Fred A. Holland, Esquire. Our background details are presented below:

- **David T. Sterngold, Esquire** joined the firm in 2024 and focuses his practice on school law, Sunshine Act and Right-to-Know Law, real estate and real property matters, commercial transactions, business succession, and municipal law. David is also a licensed Title Agent. A native of Muncy, Pennsylvania, David received his law degree from Duke University School of Law in Durham, North Carolina, where he served as Articles Editor of the Duke Law Journal. David graduated from Swarthmore College with a Bachelor of Arts degree in Political Science and History. Prior to joining the firm, David practiced at Gibson, Dunn & Crutcher in New York City, where he represented public companies and underwriters in capital markets transactions. He is licensed to practice law in both New York (admitted in 2021) and Pennsylvania (admitted in 2024). He currently serves as solicitor for the Millville Area School District and as assistant solicitor for the Williamsport Area School District and the South Williamsport Area School District.
- **Thomas C. Marshall, Esquire** has been with the firm since 1991 and has served as Managing Partner since 2000. Tom is admitted to practice in all Pennsylvania state and federal courts and is a member of the Pennsylvania Trial Lawyers Association, the American Bar Association, the Pennsylvania Bar Association, and the Lycoming Law Association. Tom has over thirty (30) years of experience handling school law matters, collective bargaining negotiations, contract disputes and grievance matters, employment and labor law matters, municipal law matters, civil litigation, land use and zoning matters, and is a certified federal mediator. Tom has handled many school board meetings, bond issuances, contract reviews and disputes, labor negotiations, grievance hearings and arbitrations on behalf of school district clients. He currently serves as solicitor and labor counsel for the Millville Area School District. Tom has previously served as the solicitor for the East Lycoming School District (over twenty-five (25) years); the Montgomery Area School District (over thirty (30) years); and the Montoursville Area School District.
- **Fred A. Holland, Esquire** has been with the firm since 2022 and focuses his practice on school law, real estate, and business and commercial law. He has practiced law for over thirty-five (35) years and has served as a solicitor for school districts in Lycoming County for over thirty (30) years. He currently

serves as the Solicitor for the Williamsport Area School District and the South Williamsport Area School District. Previously, he served as Solicitor for the Montoursville Area School District and BLaST Intermediate Unit #17. Fred was born in Wilmington, Delaware and graduated from the University of Delaware, earning a degree in economics and political science. He received his law degree from the College of William & Mary. Fred came to Williamsport in 1981 as law clerk for the Honorable Charles F. Greevy, and continued his clerkship for the Honorable Robert J. Wollet upon his election. Fred also served as an Assistant District Attorney in Lycoming County in 1983-84.

2. A list of all current Pennsylvania public school clients and non-school clients and the length and type of services provided to each.

McNerney, Page currently serves as Solicitor to the Williamsport Area School District, the South Williamsport Area School District and the Millville Area School District. Thomas C. Marshall, Esquire currently serves as solicitor and labor counsel for the Millville Area School District. Previously, the firm served as solicitors for the East Lycoming School District and the Montgomery Area School District, each for over thirty (30) years. The former Board President of the East Lycoming School District and the current Superintendent of the Montgomery Area School District are included as references in this proposal. Additionally, the firm currently serves as municipal solicitors to the following entities (and handles labor and employment matters for many of these entities):

- Central Susquehanna Regional 911
- Cooper Township
- County Commissioners Association of Pennsylvania
- Hughesville Wolf Township Joint Municipal Authority
- Lewis Township
- Lycoming-Clinton Joinder Board
- Mahoning Township
- McNett Township
- Mifflinburg Borough
- Mildred Fire Company
- Milton Regional Sewer Authority
- Montgomery Borough
- Muncy Borough Municipal Authority
- Muncy Creek Township Planning Commission
- Muncy Township Zoning Hearing Board
- Union County Commissioners
- Union County Trail Authority
- Watson Township
- Watsontown Borough
- West Branch Drug and Alcohol

- West Branch Regional Authority
- Williamsport Municipal Water Authority
- Williamsport Sanitary Authority
- Woodward Township
- Turbotville Borough

The firm also serves as Special Counsel to the Commissioners of Lycoming County, and represents a broad array of private sector clients across industries.

3. A list of any Pennsylvania public school client(s) and non-school client(s) who have terminated services in the last ten (10) years.

None. The firm has resigned positions in the past due to firm business decisions and coverage concerns.

4. Information on any pending or legal action against the firm/attorney(s) within the last ten (10) years, if applicable.

None.

5. A description of what makes you or your law firm uniquely qualified to work with the East Lycoming School District. A description of how legal services will be provided to the District as specifically as possible. Indicate if the District will be assigned an individual attorney. These individual functions should be clearly described, and any support personnel should also be identified, and their roles defined. The credentials and experience of all members of the proposed legal team should be included.

McNerney, Page provides a combination of broad legal expertise, deep experience, and prompt responsiveness that makes the firm uniquely qualified to serve the District. You will find all of our attorneys and supporting staff knowledgeable, easy to work with, responsive, and thorough.

The firm's broad legal expertise means that we are capable of performing any task the District may require of its solicitors. This includes board meeting and executive session presence; labor negotiation, contract dispute and grievance issues; drafting, reviewing and negotiating vendor contracts; updating and advising the Board on relevant legislation, policy developments and guidance from the Pennsylvania General Assembly, Pennsylvania Department of Education and the Pennsylvania School Boards Association; drafting and reviewing Requests for Proposals; property tax assessment appeals matters; personnel matters, including employee discipline, termination and contract negotiation; grant acquisition and administration; public contract issues; Sunshine Act and Right-to-Know Law issues, and ethical concerns.

The firm's deep experience enhances the quality of the legal services we will be able to provide for the District. David currently represents the Williamsport Area School District, the South Williamsport Area School District, and the Millville Area School District. He also serves as solicitor for the Williamsport Redevelopment Authority and as Special Counsel for the Commissioners of Lycoming County. David is a member of the Pennsylvania School Board Solicitors Association ("PSBSA") and regularly attends PSBSA conferences and trainings. Fred A. Holland, Esquire is also a PSBSA member and has over thirty (30) years of experience advising School Boards in Lycoming County. Thomas C. Marshall, Esquire, the Managing Partner of McNerney, Page, has over thirty (30) years of experience serving as solicitor, negotiating labor contracts and handling contract disputes and grievance issues on behalf of School Boards in Lycoming County.

McNerney, Page pairs its expertise and experience with a commitment to prompt, responsive client service. David will be available to attend all board meetings and executive sessions, in person, on a regular basis. We commit to always having an attorney present for all board meetings and executive sessions. We pride ourselves on picking up the phone, promptly responding to emails, developing strong personal relationships with our clients and delivering high-quality work product in a thorough but efficient manner.

David will be the main point of contact for the District on general representation matters, while Thomas C. Marshall, Esquire will be the main point of contact for labor matters. We will meet frequently to discuss any pending matters in the firm's representation of the District and in this process draw on the extensive experience of our colleague, Fred A. Holland, Esquire, who is among the most experienced school district solicitors in Lycoming County. Legal Assistants Nancy Houston and Mary Blik will assist with scheduling, document filing, and other tasks. Both have many years of experience as legal assistants. Occasionally, we will utilize the services of paralegals in order to deliver our services more economically.

McNerney, Page previously served as the solicitors for the East Lycoming School District from 1988 to 2020, nearly thirty-two (32) years, at which point firm decided to step away due to practice needs and coverage concerns. Thomas C. Marshall served as the District's solicitor for nearly twenty-eight (28) years. We have always enjoyed working with the District's Board and Administration as it is a forward-thinking and top quality district. We would welcome the opportunity to step back in to the solicitor role, and have the personnel available to meet the needs of the District on a timely and responsive basis.

6. A detailed/itemized fee schedule for each year of the contract, which includes:

- a. a single hourly rate for all partners and a separate single hourly rate for all associates;**
- b. an hourly rate for clerical, paralegal or other professionals;**
- c. any retainer fees; and,**
- d. a schedule of all out-of-pocket disbursements which you anticipate will result in a charge to the District and the rate for each. Note that the**

District expects these reimbursable out-of-pocket charges to be charged at the firm's actual cost without additional markup.

Our public sector attorney rate is \$195.00 per hour for general representation for all attorneys, and \$200.00 per hour for labor representation for all attorneys. Our public sector paralegal rate is \$135.00 per hour. We charge for all travel, time, and expenses. There will be no retainer fees charged for the firm's representation of the District. Out-of-pocket disbursements may include filing fees, court reporter and transcript fees, recording fees and mailing fees. Any fees not arising in the normal course of business, such as witness fees, will be communicated to and cleared with the client prior to being incurred.

7. Information beyond these minimum requirements may also be submitted.

The remainder of this proposal will summarize McNerney, Page's qualifications for the role of District Solicitor, give additional background details about the firm, and provide a list references.

McNerney, Page serves as solicitor to the Board of School Directors of the Williamsport Area School District, the South Williamsport Area School District and the Millville Area School District. The firm also represents Hughesville Wolf Joint Municipal Authority, the Milton Regional Sewer Authority, the Williamsport Municipal Water Authority, the Williamsport Sanitary Authority, dozens of municipal governments, zoning hearing boards, and the County of Union. The undersigned currently serves as the solicitor for the Millville Area School District and as assistant solicitor for the Williamsport Area School District and the South Williamsport Area School District, as well as the solicitor for the Muncy Township Zoning Hearing Board, the Williamsport Redevelopment Authority, and as special counsel for the Commissioners of Lycoming County, Pennsylvania. Thomas C. Marshall, Esquire has over thirty (30) years of experience as an attorney representing School Boards in Lycoming County. Likewise, Fred A. Holland, Esquire has served as a public school solicitor in Lycoming County for over thirty (30) years. Previously, our firm served as solicitors for the District for nearly thirty-two (32) years. This considerable expertise in advising school districts means that McNerney, Page can perform any task the District may require of its solicitors.

Our office is located at 433 Market Street, Williamsport, Pennsylvania. Neither the undersigned, nor the firm, nor any principal, have been the subject of any professional disciplinary action within the last three (3) years or ever. There is no current ongoing investigation or litigation related to the performance of the firm in the proposed field of expertise. Our firm currently receives school law publications, including those published by PSBSA and the Pennsylvania School Boards Association ("PSBA"), and numerous other publications and bulletins relative to our practice areas.

We are not aware of any potential conflicts of interest in connection with representing the East Lycoming School District. It is possible that from time to time conflicts may arise involving

the Hughesville Wolf Joint Municipal Authority, due to its shared territory with the District. We do not intend to subcontract out any work associated with representing the District.

McNerney, Page carries professional liability insurance sufficient to cover any liability associated with a solicitor's negligent acts or omissions. The firm's professional liability coverage has a limit of \$5,000,000.00. The firm's general liability insurance coverage has a limit of \$1,000,000.00 per occurrence and \$2,000,000.00 aggregate.

References:

Current Clients—

1. Williamsport Area School District (Fred A. Holland, Esquire and David T. Sterngold, Esquire)
Attn: Dr. Timothy S. Bowers, Superintendent
District Center
2780 West Fourth Street
Williamsport, PA 17701
570-327-5500
tbowers@wasd.org
2. South Williamsport Area School District (Fred A. Holland, Esquire and David T. Sterngold, Esquire)
Attn: Dr. Eric Briggs, Superintendent of Schools
515 West Central Avenue
South Williamsport, PA 17702
570-327-1581
ebriggs@swasd.org
3. Millville Area School District (David T. Sterngold, Esquire and Thomas C. Marshall, Esquire)
Attn: Dr. Joseph Rasmus, Esquire
330 East Main Street
Millville, PA 17846
(570) 458-5538
Ext. 3221
jrasmus@millsd.us
4. Williamsport Redevelopment Authority (David T. Sterngold, Esquire and Thomas C. Marshall, Esquire)
Attn: August Memmi, Executive Director
1784 E. Third Street
Box 303
Williamsport, PA 17701
(717) 418-1112

amemmi@williamsportrda.org

5. Williamsport Municipal Water Authority/Williamsport Sanitary Authority
(Thomas C. Marshall, Esquire)
Attn: Michael D. Miller, Executive Director
253 West Fourth Street
Williamsport, PA 17701
570-323-6140
mmiller@wmwa-wsa.org
6. Hughesville Wolf Joint Municipal Authority (Noah F. Roux, Esquire)
Attn: Brenda Smith, Office Manager
547 Woolen Mill Rd
Hughesville, PA 17737
570-584-4024
smithhwa@windstream
7. Williamsport Municipal Water Authority/Williamsport Sanitary Authority
(Thomas C. Marshall, Esquire)
Attn: Michael D. Miller, Executive Director
253 West Fourth Street
Williamsport, PA 17701
570-323-6140
mmiller@wmwa-wsa.org

Former Clients—

8. Montgomery Area School District (Thomas C. Marshall, Esquire and David T. Sterngold, Esquire)
Attn: Dr. Joseph Stoudt, Superintendent
120 Penn Street
Montgomery, PA 17752
570-547-1608
jstoudt@montasd.org
9. Muncy Creek Township Board of Supervisors (Jonathan L. DeWald, Esquire)
Attn: Cari Buck, Secretary/Treasurer
575 Route 442 Highway
Muncy, PA 17756
570-546-6067
muncycreektwp@comcast.net
10. Little League Baseball, Incorporated (Thomas C. Marshall, Esquire)
Attn: Joy Reynolds McCoy, Senior Vice President and Chief Legal Officer
P.O. Box 3485
Williamsport, PA 17701

570-326-1921

jmccoy@littleleague.org

(Thomas C. Marshall, Esquire served as Assistant General Counsel from 1991 through 2000 and as General Counsel for Little League Baseball, Incorporated from 2000 to 2017 at which time Little League established an in-house counsel position. Thomas C. Marshall, Esquire and the firm continue to represent Little League Baseball, Incorporated on various matters).

11. Rich Michael
Former President, East Lycoming School Board (Thomas C. Marshall, Esquire)
Michael Insurance Agency
32 S. Main Street
Muncy, PA 17756
570-546-8020
570-772-1014

Our firm is very well suited to represent the East Lycoming School District. We possess the broad legal expertise, deep experience, and prompt responsiveness to efficiently and economically deliver high quality legal services to the District. We commit to always having an attorney present for all board meetings and executive sessions.

We would welcome the opportunity to interview for this position and invite you to contact the undersigned should you have any additional questions concerning this proposal.

Thank you very much for your consideration.

Very truly yours,

McNERNEY, PAGE, VANDERLIN & HALL



David T. Sterngold, Esquire
dsterngold@mpvhlaw.com
(570) 326-6555

DTS/nh

SWEET | STEVENS | KATZ | WILLIAMS

Prepared For



**REQUEST FOR PROPOSALS
SOLICITOR SERVICES**

Table of Contents

CONTACT INFORMATION

OVERVIEW

EXPERIENCE

PROFESSIONAL STAFF

CLIENT REFERENCES

BUDGET/FEE PROPOSAL

SOUTHEAST REGION

331 East Butler Avenue, New Britain, PA 18901
PHONE 215 345 9111 | **FAX** 215 348 1147

CENTRAL REGION

P.O. Box 956, Hershey, PA 17033
PHONE 717 641 9025 | **FAX** 717 641 9026

NORTHEAST REGION

250 Kennedy Boulevard, Suite 1, Pittston, PA 18640
PHONE 570 654 2210 | **FAX** 570 655 1875

NORTHERN TIER REGION

30 Taylor Street, Suite B, Troy, PA 16947
PHONE 570 512 1440 | **FAX** 570 512 1442

Contact Information

SOUTHEAST REGION

331 East Butler Avenue
New Britain, PA 18901

Phone: **215-345-9111** / Fax: 215-348-1147

CENTRAL REGION

P.O. Box 956
Hershey, PA 17033

Phone: **717-641-9025** / Fax: 717-641-9026

NORTHEAST REGION

250 Kennedy Boulevard, Suite 1
Pittston, PA 18640

Phone: **570-654-2210** / Fax: 570-655-1875

NORTHERN TIER REGION

30 Taylor Street, Suite B
Troy, PA 16947

Phone: **570-512-1440** / Fax: 570-512-1442

Sharon W. Montanye, Managing Partner
smontanye@sweetstevens.com



Please view our firm video

SOUTHEAST REGION

331 East Butler Avenue, New Britain, PA 18901
PHONE 215 345 9111 | **FAX** 215 348 1147

CENTRAL REGION

P.O. Box 956, Hershey, PA 17033
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SWEET | STEVENS | KATZ | WILLIAMS

February 9, 2026

Mrs. Heather Burke
Board Secretary
East Lycoming School District
349 Cemetary Street
Hughesville PA 17737

Re: Response to Request for Proposals - Solicitor Services

Dear Mrs. Burke:

Thank you for inviting us to submit a proposal for solicitor legal services for the East Lycoming School District. On behalf of the firm, we appreciate the opportunity to respond to your proposal request. We enclose with this correspondence our response for your review.

We are a full-service education and employment law firm with twenty-five attorneys who have collectively represented close to 300 school districts and school entities in Pennsylvania for over 40 years. We have a complete understanding of the work to be performed for educational entities and we pride ourselves on providing legal services in a timely manner. We would be honored to assist you in general solicitor legal needs.

The firm's fees are based upon a calculation of hourly chargeable time applied to an hourly rate. The Budget/Fee Proposal contained within this correspondence explains the breakdown of costs that would be billed to the district.

We generally do not require a fixed retainer fee or a specific term of engagement to provide legal services as we believe that "paying as you go" is the most cost effective for the District since you are only charged for time spent on matters. We also believe an educational entity should be free to continue its relationship with us or not at its discretion. Furthermore, we do not use fixed fees or retainers for our solicitor services. Attendance at board meetings and executive sessions are charged at the routine hourly rate of \$200.00 per hour. This arrangement provides transparency for stakeholders and aligns with our philosophy of only charging for service provided.

If our firm is chosen to serve as your solicitor our Northern Tier office will represent you. Casandra K. Blaney would be your primary contact for solicitor legal needs and attend any Board of Directors' meetings and executive sessions as requested. Although Cassi would be your primary contact any of our attorneys at any of our locations will be happy to speak with you should you need attention to an issue and Cassi is not available at that moment. Depending on the area/issue, one or more of our other attorneys may be involved in a particular matter as well.

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Mrs. Heather Burke
Re: Response to Request for Proposals - Solicitor Services
February 9, 2026

As of the date of this letter, we know of no current clients whose representation would cause a conflict of interest that would make our firm's representation of the East Lycoming School District unethical, improper or awkward. We also have no attorney affiliated with our firm who has ever been disciplined by the Grievance Committees of the State or Federal Bar. We are members in good standing of the Pennsylvania Bar Association as well as the United States District Courts of Pennsylvania. All of our attorneys are members of the Pennsylvania School Boards Solicitors Association. We accept the terms and conditions contained in the RFP.

We would be happy to attend any interview that you may schedule. Please feel free to contact me should you have additional questions or concerns regarding the proposal.

Very truly yours,


Sharon W. Montanye
Managing Partner
For SWEET | STEVENS | KATZ | WILLIAMS
215-345-9111
smontanye@sweetstevens.com
www.sweetstevens.com

SWM:jsc

cc: Casandra K. Blaney

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1. Background information on the law firm/attorney(s) to be assigned to the District, including legal education, date of bar admission, and legal practice areas.

Sweet, Stevens, Katz & Williams LLP, a registered limited liability partnership, was founded in 1995 when nine experienced Education lawyers left a traditional Bucks County law firm to form a new law firm offering services exclusively in the areas of Education and Employment law – one of the first law practices of its kind in Pennsylvania.

We are a full service education and employment law firm with twenty-five attorneys who have collectively represented close to 300 school districts, vo-techs, intermediate units and municipal entities in more than 50 counties throughout Pennsylvania for over 40 years serving either as Solicitor or as special counsel. We maintain four offices across the commonwealth: in Southeast, Central, Northeast and Northern Tier Pennsylvania. We have a complete understanding of the work to be performed for educational entities and we pride ourselves on providing legal services in a timely manner.

It is the mission of SWEET, STEVENS, KATZ & WILLIAMS LLP to deliver the highest quality legal services as ethically, effectively and efficiently as possible, and to provide those services with a primary focus on collaboration, both internally and with clients, for practical solutions. SWEET, STEVENS, KATZ & WILLIAMS LLP is dedicated to the principle of continual improvement of legal services through innovation, integrity, loyalty to each other and to our clients and continuing research and pursuit of knowledge in areas relevant to our practice.

Attorney to be assigned to East Lycoming School District would be:

Cassandra K. Blaney, Special Counsel – Temple University School of Law (J.D.)

PA Bar Admission 10/18/2006

Northern Tier Office

Areas of Concentration: Solicitor Services, Real Estate Law and Abstract Services, Oil, Gas and Mineral Law

Resumes of all of our attorneys are included under professional staff

2. A list of all current Pennsylvania public school clients and non-school clients and the length and type of services provided to each.

Please see the attached listing, under client references, of solicitor clients including dates of service and services provided. A full listing of clients we have represented in the past 3 years is also included.

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3. A list of any Pennsylvania public school client(s) and non-school clients who have terminated services in the last ten (10) years.

School districts who have terminated services with SSKW within the past ten years are as follows:

Elected to utilize the legal services of former associates:

North Penn School District, Upper Moreland Township School District, Upper Perkiomen School District, East Lycoming School District, Greater Nanticoke Area School District, Hazleton Area School District, Northwest Area School District, Wilkes-Barre Area School District*

Chose another law firm to handle their special counsel legal services:

Central Bucks School District, Council Rock School District, Reading Area School District, Chichester School District and Scranton Area School District, Troy Area School District*

** Greater Nanticoke Area School District - Transferred files to other counsel in 2017, resumed using SSKW services 2019*

** Central Bucks School District – Transferred files to other counsel in March 2023, resumed using SSKW services in June 2023*

4. Information on any pending or legal action against the firm/attorney(s) within the last ten (10) years, if applicable.

Sharon Montanye, Managing Partner, was sued by a pro se special education parent who filed multiple lawsuits against multiple parties raising claims for violation of constitutional and civil rights as well as conspiracy and retaliation claims. The Court rejected all of the claims against Attorney Montanye who was dismissed from the lawsuits.

5. A description of what makes you or your law firm uniquely qualified to work with the East Lycoming School District. A description of how legal services will be provided to the District as specifically as possible. Indicate if the District will be assigned an individual attorney. This individual's functions should be clearly described, and any support personnel should also be identified and their roles defined. The credentials and experience of all members of the proposed legal team should be included.

Each member of our team of attorneys concentrates most particularly in one or more specific areas of education, municipal or employment law, it is the goal of SWEET, STEVENS, KATZ & WILLIAMS LLP that the various attorneys be as interchangeable as possible. That policy is intended to ensure that when an answer is needed "right now," there will be at least one of the team available at all times to provide a prompt response.

Sweet, Stevens, Katz & Williams LLP recognizes that today's school or municipal administrator needs timely, understandable advice that reflects the current state of education, employment and municipal laws. By keeping up on a daily basis in those specific areas, the firm's attorneys are frequently able to respond quickly without need for time-consuming research. By constantly doing our homework and by emphasizing practical, understandable advice, we feel that we are able to deliver our services with maximum efficiency.

As a full service education law practice, SSKW has achieved significant rulings and accomplishments. In particular, labor and special education laws have been litigated to the district's benefit on a regular basis. SSKW is responsible for establishing the first intermediate unit, handling the first special education lawsuit, as well as bargaining the first collective bargaining agreement in Pennsylvania between a teacher's bargaining unit and a district. Our litigation department regularly argues cases before the Third Circuit Court of Appeals and Commonwealth Appellate Court. Our presence has remained dominant and our firm carries with it a level of respect and legitimacy when we walk into a hearing in a labor, special education or solicitorship setting.

Cassandra K. Blaney will provide guidance and advice to the District Administration and the Board of Directors on all legal matters. Draft and review all necessary legal documents, agreements, and memorandums of understanding, including editing vendor contracts, preparing educational “white” papers on various topics, and providing analyses of various issues coming before and impacting the District. Assist with drafting various Requests for Proposals (RFPs) for other consultants as may be necessary. Facilitate and provide guidance related to property tax assessment appeals process, including direct communications with the property owner for settlement discussions. Assist with personnel matters, including employee discipline, termination, and labor negotiations, as requested. Attend monthly meetings of the Board of Directors, including Executive Sessions. Provide timely advice and counsel on all emergent matters. Cassi will respond within a maximum of forty-eight hours when a formal inquiry is made. Ensure the District is legally compliant with all state and federal rules and regulations and provide any other legal duties as may be assigned by the District.

6. A detailed/itemized fee schedule for each year of the contract, which includes: (a) a single hourly rate for all partners and a separate single hourly rate for all associates; (b) an hourly rate for clerical, paralegal or other professionals; (c) any retainer fees; and (d) a schedule of all out-of-pocket disbursements which you anticipate will result in a charge to the District and the rate for each. Note that the District expects that these reimbursable out-of-pocket charges will be charged at the firm’s actual cost without additional markup.

The firm’s fees are based upon a calculation of hourly chargeable time applied to an hourly rate. The Budget/Fee Proposal contained within this correspondence explains the breakdown of costs that would be billed to the district. Our standard hourly rates for school year 2025-2027 will be as follows:

School Year	Attorney Routine Matters	Legal Assistant/Paralegal Routine Matters	Attorney Non-Routine Matters	Legal Assistant/Paralegal Non-Routine Matters
2025-2026	\$200.00/hour	\$150.00/hour	\$220.00/hour	\$150.00/hour
2026-2027	\$210.00/hour	\$160.00/hour	\$230.00/hour	\$160.00/hour

* Notification of rates for upcoming school year are distributed by email annually in December

Our out-of-pocket expenses for computerized research, e-discovery services, stenographic services (court reporters), in-house composition of briefs and records, i.e., printing, collating and binding, costs for hearing officers or arbitrators, witness fees, photocopying (\$.20 per copy), and court costs, where required, are charged to our clients at cost. At times, when such charges are substantial, we may ask you to pay them directly.

We generally do not require a fixed retainer fee or a specific term of engagement to provide legal services as we believe that “paying as you go” is the most cost effective for the District since you are only charged for time spent on matters. We also believe an educational entity should be free to continue its relationship with us or not at its discretion.

Please see detailed fee agreement under Budget/Fee Proposal.

Sullivan County School District

777 South Street
PO Box 240
Laporte, PA 18626
Phone 570-946-8200 - Fax 570-946-8210
www.sulcosd.k12.pa.us



Mary Elise Nolan
President

Shelly Jordan
Secretary

Samantha Kahler
Superintendent

April Tourscher
Business Manager

To Whom It May Concern:

I am writing to offer my strong recommendation for Casandra Blaney who serves as the Solicitor for the Sullivan County School District. In my role as Superintendent, I have had the opportunity to work closely with Casandra Blaney on a wide range of legal, governance, and operational matters affecting the district.

Casandra Blaney is consistently responsive, dependable, and thorough in her work. She provides timely guidance, often under tight deadlines, and ensures that the district's leadership team and Board of School Directors are well-informed and confident in their decision-making. Her ability to clearly explain complex legal issues in a practical and accessible manner has been invaluable.

In addition to her legal expertise, Casandra Blaney demonstrates a strong understanding of the unique challenges facing public school districts. She approaches each matter with careful attention to detail, sound judgment, and a commitment to protecting the district's best interests while remaining compliant with applicable laws and regulations.

Casandra Blaney is a trusted advisor and an asset to our district. I recommend her without reservation and am confident she would continue to serve any school entity or organization with the highest level of professionalism and integrity.

Please feel free to contact me should you require any additional information.

Sincerely,

A handwritten signature in black ink, appearing to read 'Samantha Kahler', written in a cursive style.

Samantha Kahler

Superintendent

Overview

Sweet, Stevens, Katz & Williams LLP, a registered limited liability partnership, was founded in 1995 when nine experienced Education lawyers left a traditional Bucks County law firm to form a new law firm offering services exclusively in the areas of Education and Employment law – one of the first law practices of its kind in Pennsylvania. Since then, the firm has grown to over 20 attorneys who represent close to 300 schools districts, vo-techs, intermediate units and municipal entities in more than 50 counties throughout Pennsylvania serving either as Solicitors or as special counsel. We maintain four offices across the commonwealth: in Southeast, Central, Northeast and Northern Tier Pennsylvania. While our practice continues to expand, our primary focus remains on the representation of school entities.

In the special counsel role, firm members have served school entities in cooperation with or as an additional resource to the local Solicitor, providing experience in complex areas of education and labor law in which specialized assistance is needed. In the Solicitor role, firm members serve as general counsel to school districts, vocational schools, intermediate units and municipalities. The firm currently serves as Special Counsel to 212 school districts and as Solicitors to 19 school districts, 4 vocational schools, and 4 intermediate units. Additionally, the firm has represented several municipalities in labor matters and continues to represent them as special counsel or solicitor.

Our firm consists of twenty-five attorneys. By virtue of our extensive experience, we believe that we can offer services that are unique and efficient. The resumes of the firm's lawyers are included.

Although each member of our team of attorneys concentrates most particularly in one or more specific areas of education, municipal or employment law, it is the goal of SWEET, STEVENS, KATZ & WILLIAMS LLP that the various attorneys be as interchangeable as possible. That policy is intended to ensure that when an answer is needed "right now," there will be one of the team available at all times to provide a prompt response.

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SWEET, STEVENS, KATZ & WILLIAMS LLP offers proactive services including seminar and in-service presentations whether for a small group such as supervisors, or an entire staff or part thereof, at a reasonable cost. For seminars and in-services, we charge a flat amount for making such a presentation.

For an additional fee, we also offer “pool counsel” services. The concept of the “pool consultation agreement” on non-adversarial matters allows our clients in the right circumstances to use alternative funding sources, such as ACCESS or IDEA flow-through monies, that would not be available to pay for representation in adversarial, or disputed matters. The exact scope of services contained in each agreement or plan may vary. The “pool counsel” covers the following types of services:

- Telephone advice and consultation concerning issues and matters that have not become “adversarial”
- E-mail opinions concerning issues arising in non-adversarial matters, with opinions that do not contain personally identifiable student information and do not disclose client confidences (often distributed to all “pool” clients)
- Policy review and development, form review and development; policies, guidelines and forms are often distributed to “pool” clients
- Review and revisions in non-adversarial matters; sample language and suggestions often distributed to all “pool” clients
- On-site trainings and in-services, limited to a certain amount/frequency, together with written training materials (the latter often distributed to all “pool” clients in digital form)
- On-site meetings and consultations, limited to a certain amount/frequency per year
- Collective advocacy before Congress, the General Assembly, state and federal Departments of Education, for change in statutes and regulations affecting special education and student services

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Experience

CIVIL RIGHTS LEGISLATION: School entities, as local government agencies, are subject to the often-conflicting demands of constitutional and civil rights possessed by different constituents. Additionally, the conduct of employees can be scrutinized under the lens of constitutional and civil rights analysis, resulting in both institutional and individual liability. Defending against claims of constitutional deprivations begins with excellent legal counsel and initial risk-avoidance advice.

Our Civil Rights Defense practice overlaps with many of our other practice areas, where we have handled issues involving the Americans with Disabilities Act, the Age Discrimination in Employment Act, the Civil Rights Act of 1964, the Children's Internet Protection Act, Section 504 of the Rehabilitation Act, and Constitutional Law. As school leaders are frequently required to balance competing rights, the services and advice we offer go a long way to successfully navigating the byzantine maze of constitutional and civil rights.

Unfortunately, litigation still frequently occurs despite risk-avoidance measures and sound school leadership. When our clients are sued, our firm draws on its collective years of substantive experience and teams it with our litigation experience. Our goal is to aggressively defend our clients at all stages in the litigation process in a cost-effective and outcome driven manner. Our attorneys are proven litigators willing to fight for our clients' interests. We have acted as counsel in many significant cases where school leadership was challenged about decisions affecting different constituent groups. We have extensive experience with Civil Rights Legislation and have been involved in a significant number of cases in the Federal Courts involving these matters.

EDUCATIONAL TECHNOLOGY: Our education technology practice is dedicated to finding practical solutions that harness new technologies to enhance learning while protecting the legal interests of school districts or other school entities. Our substantial experience in educational technology provides strong support to school solicitors across the state who may not be able to stay on top of such a rapidly changing field, its increasingly complex technological trends, and the intricate array of legal and regulatory requirements.

Our EdTech Pool Counsel provides members with a vast array of resources and legal opinions on new technologies and legal issues as quickly as they emerge. Rather than each school entity or intermediate unit (IU) re-inventing the wheel through new policies and procedures for each new tech trend, our considerable background with these evolving issues allows us to provide timely advice on the trend and guide how to successfully navigate the legal issues involved. A model acceptable use policy, mobile device policies, and electronic records management procedures are updated based upon changes in law and technology and quickly distributed to clients. Ultimately, our experience in the field and the resources of the Pool Counsel save precious monetary resources for school entities and IUs by preventing costly litigation and legal missteps.

Sample issues include:

- Teacher and student use of social media, both in and out of school
- Mobile device use in schools
- How to deploy 1:1 computers or tablets for each student
- E-discovery compliance
- Electronic records management
- E-rate and compliance with the Children's Internet Protection Act

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EMPLOYMENT DISCRIMINATION: Regardless of how many employees a district employs, it is imperative to have an understanding of the many complex federal and state anti-discrimination laws. Accordingly, on a daily occasion, we proactively strive to inform our clients on a wide variety of employment issues. For instance, we very commonly advise our clients on the following:

- **Americans with Disabilities Act (“ADA”).** In a large organization like a school district, it is inevitable that employees will get sick or injured and seek leave or some other sort of workplace accommodation. In such cases, the ADA expects employers to take certain actions. We routinely advise our clients on what the appropriate actions are and how to avoid protracted litigation.
- **Age Discrimination in Employment Act (“ADEA”).** As the workforce gets older, employment issues relating to age are becoming more prevalent. We provide our clients with the information they need to know to comply with this law.
- **Civil Rights Act of 1964 (“Title VII”).** This law prohibits discrimination based on an individual’s race, color, religion, sex, and national origin. Often times, in the school context, many employees allege some sort of discrimination as a result of receiving an adverse employment decision by a school district or other school entity. Therefore, we attempt to ensure our clients are fully compliant with the dictates of this law before any employment action is taken.
- **United States Constitution, First and Fourteenth Amendment.** As social media becomes more and more engrained in our daily lives, legal issues relating to an individual’s free speech rights and equal protection rights are routinely finding their way into the courtroom. We have litigated precedent-setting law in this area and constantly provide guidance on these issues to our clients.

In addition to proactively advising our clients on issues such as those described here, we are also proud of our successful litigation record in defending our clients in administrative hearings before the Pennsylvania Human Relations Commission, the United States Equal Employment Opportunity Commission, and in state and federal court.

We take pride in the hundreds of matters that have been judicially dismissed against our clients by way of judgment and/or trial. It is our goal to aggressively defend our clients at all steps of the litigation process. Our attorneys are proven litigators willing to fight for our clients’ interests.

LABOR AND EMPLOYMENT: Beyond the traditional topics of bargaining of union contracts and employee discipline proceedings, this also encompasses general labor relations, contract administration, personnel and hiring policies analysis and fringe benefit issues.

Labor and Employment law also includes employee evaluations, administrators’ Act 93 agreements, employee handbook preparation and analysis, assistance in dealing with attempts by unions to organize employees, defense of discrimination complaints and other civil rights claims, and defense of unfair labor practice charges.

Typical calls we receive from clients include these questions:

- “Is this employee covered under FMLA?”
- “We have reached an impasse with the union. What do we do now?”
- “How do we handle benefits and contributions when a contract is frozen?”
- “How long should contract negotiations take?”
- “Is someone entitled to have legal representation at a disciplinary meeting?”
- “To what extent can we reduce hours of classified staff or eliminate positions?”

The questions and needs vary by district or entity and even time of year. However, we are well-prepared on all of the issues above and many more. Our lead attorneys handling employment law issues have over 100 years of labor relations experience under their belts. Additionally, the firm was involved in negotiating several of the first collective bargaining agreements in Pennsylvania under Act 195 enacted in 1970, which established the framework of public-sector collective bargaining in Pennsylvania, giving public employees and teachers the right to strike (and continued on to negotiate over 600 collective bargaining agreements within the Commonwealth).

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LABOR AND EMPLOYMENT (con't): Additionally, we provided insight, recommendations, and suggestions to the General Assembly that led to its adoption of Act 88 of 1992, a ground-breaking revision to Pennsylvania's collective bargaining law, later testing and developing strategies for implementing collective bargaining under that Act.

RIGHT TO KNOW The purpose of the Right-to-Know Law was to foster transparency in governmental activities by allowing members of the community access to certain information from public entities. As local education agencies, public school districts, intermediate units, charter schools, trade and vocational schools are all subject to the law's requirements.

Our Right-to-Know practice involves providing guidance to those school entities every day on this ever-changing and growing area of the law. This includes advising what constitutes a "public record," how (and for how long) such records should be stored and maintained, the procedures and methods for sharing information in response to a lawful request, and when certain information is protected and therefore exempt from public access.

The firm also guides clients in operational questions, such as what to do when an employee has used a private account or device in official communications, and how changes to the law affect those procedures.

As the scope of the law can be the subject of contention, the firm is prepared to assist clients when a request – or claim of exception – results in litigation. We have represented clients before administrative and appellate courts in all matters related to the Right-to-Know Law.

SPECIAL EDUCATION: A myriad of complex federal and state laws make providing special education services to eligible students one of the most difficult areas of legal compliance for public school districts and entities. To successfully navigate these demands, those districts and entities must be familiar with the laws and educate all staff on the intricacies of providing such programs. Neglecting either opens the district or entity to significant liability exposure.

We pride ourselves in being one of the preeminent authorities on special education law in Pennsylvania, guiding clients who come to us regularly with questions including:

- "How do we discern whether a child qualifies for services under the Individuals with Disabilities Education Act (IDEA) or Section 504 of the Rehabilitation Act of 1973?"
- "How can we effectively draft a student's Individualized Education Program (IEP), accurately and effectively reflecting their present levels of achievement, specially-designed instruction and future goals?"
- "We have received a request for an Independent Educational Evaluation at public expense. Can we use our last evaluation (or reevaluation) on file?"
- "A parent has indicated that he/she wants to proceed to a due process hearing regarding their child. What do I do now?"
- "A parent wants to change his/her child's special education program. How should I respond?"
- "A parent has requested that we place his/her child in a private school. What should I do now?"

Not only do we respond and counsel schools on the above questions on a day-to-day basis, but we proactively provide in-service trainings to teachers and staff on these very issues, so districts and entities can recognize and avoid potential legal problems before they occur. Additionally, our Pool Counsel service provides a cost-effective way to receive ongoing feedback on general legal issues.

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STUDENT SERVICES: Today, there so many legal issues concerning students in public schools and school entities. And certainly, while there is no way to eliminate all these issues from occurring in a school, there are ways to handle them quickly and definitively:

- Student discipline
- Student residency disputes
- Child custody disputes
- Access to and release of student records
- Emancipation
- Free-speech issues
- Religious issues
- Dress code issues
- Drug and Alcohol testing of students
- Security issues, including searches of lockers, vehicles or personal belongings

Each of these areas, if not handled correctly, can come back to haunt a district and its employees later. Through swift coordination of the school's response to regular in-service training and our Pool Counsel service, we have worked to greatly minimize the possible adverse consequences of missteps.

TAX ASSESSMENT: We have represented many of our clients in the defense of property tax assessment appeals before the Board of Property Assessment, Appeals and Review; at the trial court level before the Court of Common Pleas; and in appeals before the Commonwealth Court and the Pennsylvania Supreme Court. We have also filed affirmative appeals for our school entity clients and secured increases in assessments on properties.

We maintain a list of appraisers in multiple counties to develop an opinion of market value for properties to provide support in litigation defending the assessment on a property and to determine whether the school district should file an appeal challenging the assessment on a property.

TITLE IX: Allegations of sexual assault, harassment, or discrimination must be investigated using a multi-step, comprehensive grievance process. Non-compliance by way of a deliberately indifferent response to sexual misconduct can result in large claims for money damages and possible further harm to children or employees. Our firm supports designated administrators as they navigate these high stakes situations to meet regulatory requirements and manage risk exposure across school environments, including in disciplinary proceedings and athletic participation. The starting place for compliance is preparation and adoption of policies and procedures followed by legally required regular training on Title IX compliance.

Our style of representation in Title IX matters is proactive and comprehensive, which decreases likelihood of litigation. However, when litigation has occurred, our firm has successfully defended school districts in federal court against Title IX claims of sexual misconduct as well as Title IX compliance issues. We also have experience at the Office for Dispute Resolution when special education disputes involve facets of Title IX. In addition to our regular legal representation, we offer fee-based Title IX packages of training and materials along with our members only resource room which contains prerecorded trainings and written materials, court decisions and frequent Q&As. All our attorneys who work on Title IX matters have been formally trained on the regulatory requirements. As such, we are uniquely qualified to serve as unbiased Title IX personnel, including investigator, decision-maker, informal resolution facilitator, or appeal decision-maker. The need for such services arises in both student and employee misconduct cases.

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CENTRAL REGION

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NORTHERN TIER REGION

30 Taylor Street, Suite B, Troy, PA 16947
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SWEET | STEVENS | KATZ | WILLIAMS

MUNICIPAL LAW: Our firm routinely serves as solicitor and special counsel to municipalities and municipal authorities. We have covered virtually every aspect of municipal law, including researching and drafting ordinances and litigating zoning disputes.

We have considerable experience in handling issues of governance, including compliance with the Sunshine Act and the Right to Know Law, and the word “experienced” doesn’t begin to cover our work involving labor representation. We successfully guide negotiations with uniformed and non-uniformed personnel, and skillfully handle the defense of grievances.

Since our practice only represents public entities, we understand the need to be responsive, attentive and creative. Our municipal clients are responsible to their own constituents and regularly wrestle with increasingly difficult challenges in governance, and we do everything we can to make their role easier.

Our work in this arena includes:

- Solicitor work
- Drafting, revising and reviewing ordinances, resolutions and motions
- Representing the client’s interests in magisterial district court on zoning enforcement matters, fines, and collection of service fees
- Ensuring compliance with the Sunshine Act and the Right to Know Law
- Litigation of tax assessment disputes
- Preparation and negotiation of land development agreements
- Labor work
- Negotiating collective bargaining agreements with uniform personnel under Act 111
- Negotiating collective bargaining agreements with non-uniform personnel
- Defense of grievances
- Negotiating contracts with key administrative personnel
- Advising on discipline and discharge issues
- Zoning
- Representation of zoning hearing boards
- Representation of municipalities before zoning hearing boards
- Special Counsel
- Litigation on behalf of the municipality in contract disputes, construction matters and injunction and mandamus actions
- Representation of the municipality in complex zoning matters before the Pennsylvania Commonwealth Court and Supreme Court

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Professional Staff

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John G. Audi, Of Counsel
Christopher A. Bambach, Partner
Casandra K. Blaney, Special Counsel
Christine L. Cattani, Associate
Mark Cheramie Walz, Partner
Andrea L. Cola, Partner
Leslie A. Collins, Of Counsel
David F. Conn, Partner
Maria B. Desautelle, Senior Associate
Jason D. Fortenberry, Partner
Kalani Linnell Asroff, Associate
Shawn D. Lochinger, Partner
Rose E. McHugh, Senior Associate
Sharon W. Montanye, Managing Partner
Suzanne Pontious, Senior Associate
Karl A. Romberger, Jr., Partner
Marcie M. Romberger, Associate
Jason P. Sam, Associate
Tammy J. Schmitt, Senior Associate
Christina M. Stephanos, Partner
Rebekah Van Der Werf, Associate
Thomas C. Warner, Partner
Hillary P. Wexler, Associate
Jane M. Williams, Partner

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SWEET | STEVENS | KATZ | WILLIAMS

PETER AGNONE RUANE

Associate

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Peter Agnone Ruane's practice areas include solicitor services, labor and employment, and special education. Based in the firm's Pittston office, he supports clients throughout the northeast region of Pennsylvania, counseling school administrators on their day-to-day legal needs and working closely with district leadership to help strengthen programs, services, and operations.

Peter's skills in policy development, compliance, and organizational improvement were especially honed during his work in key leadership roles with UNICEF, where he developed and implemented internal regulations, guided large-scale policy initiatives, and consulted on organizational change projects around the globe. His experience navigating complex regulatory frameworks and improving operational efficiency informs his practical, solutions-focused approach to education law.

Earlier in his career, Peter practiced family law, advised small businesses and nonprofits, and served as a judicial law clerk in Lackawanna County. He is a Board-Certified Coach through the Center for Credentialing and Education and a Fellow of the Royal Society of Arts.

Peter's diverse experience reflects a longstanding commitment to helping organizations deliver critical services effectively and efficiently—work he continues on behalf of public education.

EDUCATION

Duquesne University School of Law (J.D.)

University of Scranton (B.A., Philosophy, B.A., Theology)

BAR ADMISSIONS

Pennsylvania

United States District Court for the Middle District of Pennsylvania

AREAS OF PRACTICE

Labor and Employment

Solicitor Services

Special Education

LATEST NEWS

Immigration and Schools: Understanding Evolving Policies, 8/18/25

Sweet Stevens Adds Veteran Policy Strategist to Team, 6/9/25

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SWEET | STEVENS | KATZ | WILLIAMS

JOHN G. AUDI

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John Audi has over 35 years of experience in public sector Labor and Employment Law and now focuses his work on education labor law, public sector labor law, legal consultation and staff training.

He started his career as general counsel to a union of state workers employed by the Office of Employment Security, and from 1999-2008 served as in-house regional counsel for the Pennsylvania State Education Association.

His vast experience touches all aspects of labor relations matters, including arbitrations, bargaining, PLRB hearings, and related court litigation. He served for 11 years as an administrative law judge for the Pennsylvania Labor Relations Board and he is a frequent lecturer on labor, employment and education legal matters.

EDUCATION

Dickinson School of Law (J.D.)

University of Scranton (B.S.)

BAR ADMISSIONS

Pennsylvania

United States District Court for the Middle District of Pennsylvania

United States Supreme Court

AREAS OF PRACTICE

Employment Discrimination

Labor and Employment

Municipal Law

Right-to-Know Law

Solicitor Services

MEMBERSHIPS

Pennsylvania Bar Association

Pennsylvania School Board Solicitors Association

Luzerne County Law and Library Association

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CHRISTOPHER A. BAMBACH

Partner

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Chris Bambach is primarily involved in the representation of school districts and entities in matters of special education throughout the Commonwealth of Pennsylvania. He represents school entities at both the administrative and appellate levels, and also proactively provides informed counseling to his clients in all matters of special education.

Chris joined Sweet, Stevens, Katz & Williams after several years of practice involved in complex and general civil litigation in Pennsylvania and Mississippi. He now puts his comprehensive and successful background in litigation to work every day in successfully resolving matters for his clients.

EDUCATION

Mississippi College School of Law (J.D.)

The University of Scranton (B.A.)

AREAS OF PRACTICE

Special Education

Student Services

BAR ADMISSIONS

Pennsylvania

Mississippi

United States District Court for the Eastern District of

Pennsylvania

United States District Court for the Middle District of Pennsylvania

LATEST NEWS

School Counseling Video Installment: What Should IEP Teams do if a Student is Refusing to Come to School?, 3/21/25

Sweet Stevens Announces Attorney Promotions, 1/22/25

Sweet Stevens Attorneys to Present at Pennsylvania School Law Workshop, 9/30/24

Sweet Stevens Prevails in School Expulsion Case, 4/5/24

Sweet Stevens Plays Key Role at 2022 Exceptional Children Conference, 9/28/22

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CASANDRA K. BLANEY

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Casandra Blaney provides guidance to school entities in the role of solicitor, to ensure the smooth operation of business and administration. She also handles real estate contract and property transactions, with the added benefit of offering clients the companion abstract services necessary for these matters, as well. Additionally, she advises clients on ownership and acquisition issues related to oil, gas and minerals.

She brings experience in both the private and public sectors. Previously, she served as managing partner at a Pennsylvania private sector law firm, assisting clients in the areas of her current focus, as well as business issues, commercial and personal civil litigation, estate planning and administration, and family law.

She has also served as the managing attorney for the nonprofit North Penn Legal Services in Bradford and Susquehanna counties, offering civil representation across a spectrum of legal areas, including family and elder law, employment, housing, education, and consumer credit.

EDUCATION

Temple University School of Law (J.D.)

Lycoming College (B.A.)

BAR ADMISSIONS

Pennsylvania

United States District Court for the Middle District of Pennsylvania

United States Court of Appeals for the Third Circuit

Supreme Court of Pennsylvania

AREAS OF PRACTICE

Real Estate Law and Abstract Services

Oil, Gas and Mineral Law

Solicitor Services

LATEST NEWS

Sweet Stevens Expands to Northern Tier of Pennsylvania with New Office, Attorney, 7/31/24

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CHRISTINE L. CATTANI

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Christine Cattani joined Sweet, Stevens, Katz & Williams in 2021 after operating her own solo practice for over a decade. Her work for clients encompassed a number of practice areas, including tax law, contract law, real property law, equine law, criminal defense and civil litigation. At Sweet Stevens, she will assist clients with tax assessment appeals, zoning hearings, Right-to-Know responses and general litigation.

Committed to serving in the community and helping others succeed, she has served as a coach for the Pennsylvania State Bar Association Young Lawyer Division Mock Trial Competition, and received a Certificate for Extraordinary Pro Bono Work from the Bucks County Bar Association. She was also nominated for the association's "Justice Rising" award for three years in a row. She serves as a guest lecturer for Bucks County Community College and Holy Family University and also as an instructor for the Bucks County Juvenile Court's "Progress: Law & Responsibility" program.

She obtained her undergraduate degree from Temple University's Boyer College of Music, studying under renowned piano scholar Dr. Charles Abramovic.

EDUCATION

Temple University Beasley School of Law (LL.M. Taxation)

Thomas M. Cooley Law School (J.D.)

Temple University Boyer College of Music (B.M.)

BAR ADMISSIONS

Pennsylvania

United States District Court for the Eastern District of

Pennsylvania

United States District Court for the Middle District of Pennsylvania

United States Tax Court

AREAS OF PRACTICE

Civil Rights Defense

Employment Discrimination

Labor and Employment

Right-to-Know Law

Tax Assessment Appeals

MEMBERSHIPS

Pennsylvania School Board Solicitors Association

Pennsylvania Bar Association

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MARK W. CHERAMIE WALZ

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Mark Cheramie Walz is dedicated to leveraging technology in education to create practical solutions that enhance innovation while minimizing liability. As the head of Sweet Stevens' Education Technology Pool Counsel, he collaborates with school districts and Intermediate Units (IUs) across Pennsylvania, focusing on cutting-edge technology issues such as artificial intelligence (AI), data privacy, cybersecurity, and mobile device management. His expertise extends to developing policies and frameworks that help educational institutions navigate the evolving legal and technological landscape.

Mark also serves as solicitor or special counsel for school districts and IUs and frequently represents them in due process hearings and federal court appeals. A dynamic public speaker, Mark provides in-service training for educators on topics such as AI in education, compliance with data privacy laws, and implementing robust cybersecurity measures. His presentations are highly sought after for their relevance and actionable insights.

Before joining Sweet Stevens, Mark served as a special victims prosecutor in Bucks County, specializing in child abuse and computer crime investigations. His in-depth knowledge of computer and mobile phone forensics now informs his legal guidance for schools, helping them navigate complex issues like cybersecurity breaches and online safety for students. Mark is passionate about empowering educational institutions to embrace the future of technology responsibly, ensuring students benefit from innovation while remaining protected by well-crafted legal frameworks.

EDUCATION

Villanova University School of Law (J.D., *magna cum laude*),
Hyman-Goodman Award
Villanova University (M.P.A.)
George Washington University (B.A.), Isaac Davis Award

AREAS OF PRACTICE

Educational Technology
Solicitor Services
Special Education
Student Services

BAR ADMISSIONS

Pennsylvania
New Jersey
United States District Court, Eastern District of Pennsylvania
United States District Court, Middle District of Pennsylvania
United States District Court, Western District of Pennsylvania
United States Court of Appeals, Third Circuit

MEMBERSHIPS

Pennsylvania Bar Association
Pennsylvania School Board Solicitors Association
International Society for Technology in Education

LATEST NEWS

School Counseling Video Installment: How Should IEP Teams Handle a Request for a Student to use AI Technology as an Accommodation?, 5/29/25
Cheramie Walz Shares AI Insight at Sold-out Symposium, 4/11/25
Mark Cheramie Walz Interviewed by National School Public Relations Association, 3/25/25
Sweet Stevens Captures Win for Area School District In Federal Appeals Court, 12/3/24
Cheramie Walz Presents on AI in Education at PASA/PSBA Conference, 10/15/24

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ANDREA LYNNE COLA

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Andrea Lynne Cola focuses her work on matters involving civil rights, special education and student services. Her consideration for the issues that the firm's school entity clients face each day is influenced by a professional background that includes not only work within a school district, but also on behalf of students and children.

Prior to joining the firm, she worked as an attorney for the School District of Philadelphia in its Special Education Unit. There, she managed a high volume of claims and complaints against the district, negotiating settlements when able, and appearing in litigation venues when necessary. She also counselled district personnel on day-to-day legal issues in schools and provided professional development training to staff.

Prior to her work with the School District of Philadelphia, she worked for the Defender Association of Philadelphia. There, she worked to enforce the rights and needs of children in matters involving abuse, dependency/parental rights, education conflicts/issues, and ongoing support. While attending law school, she was awarded the Suffolk University Juvenile Justice Fellowship, and achieved honors in the Juvenile Justice Clinic.

EDUCATION

Suffolk University Law School (J.D., cum laude)

Northeastern University (B.S., cum laude)

BAR ADMISSIONS

Pennsylvania

United States District Court for the Eastern District of

Pennsylvania

United States District Court for the Middle District of Pennsylvania

AREAS OF PRACTICE

Civil Rights Defense

Special Education

Student Services

MEMBERSHIPS

Pennsylvania Bar Association

Pennsylvania School Board Solicitors Association

LATEST NEWS

Sweet Stevens Secures Victory for Local School District in Special Education Hearing, 10/29/24

Sweet Stevens Attorneys to Speak at Pennsylvania Bar School Law Update, 11/13/23

Sweet Stevens Attorneys Present at National CASE Conference, 11/3/23

Cola, Schmitt to Present at PA Special Education Leadership Symposium, 9/5/23

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LESLIE A. COLLINS

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Leslie Collins concentrates her work in the areas of special education and student services.

She joined the firm after working as a staff attorney for the Pennsylvania State Education Association. There, she counseled members, governance and staff in matters pertaining to individuals with disabilities, special education, assessment and accommodations, child protective services, student records, school funding, ESEA, establishment of religion, school violence, Transfer Between Entities and other legal issues arising in the public educational setting. She was responsible for assisting in drafting, reviewing, and/or analyzing federal and state statutes, regulations and guidelines pertaining to these areas and for providing professional development to staff, members and at special education conferences in Pennsylvania and in other states.

Her background also includes work for the United States Department of Education in Washington, D.C., where she analyzed and drafted legislation, prepared departmental recommendations for Congress on legislation affecting special education, and received an award for exemplary performance.

She has served as a board member of the Pennsylvania Board of Law Examiners, which administers the bar examination for lawyers entering the profession, and is a frequent speaker at conferences on various issues related to special education and related areas.

EDUCATION

Georgetown University Law Center (J.D.)

Antioch College (B.A.)

AREAS OF PRACTICE

Special Education

Student Services

BAR ADMISSIONS

Pennsylvania

Connecticut

United States District Court for the Eastern District of

Pennsylvania

LATEST NEWS

School Counseling Video: Do Students Need a 504 Plan for a Medical Condition if They Already Have an Individual Health Plan in Place?, 6/23/25

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DAVID F. CONN

Partner

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email: dconn@sweetstevens.com



David Conn is a seasoned litigator who has represented public entities of almost every kind, including county agencies, townships, boroughs, school districts and municipal authorities. In that capacity, he has appeared in everything from administrative hearings to appeals before the Pennsylvania Supreme Court.

David's approach combines a commitment to public service with a fierce attachment to advocacy and he is always looking for creative solutions to face the dynamic challenges confronting public entities.

EDUCATION

Temple University School of Law (J.D.)
Macalester College (B.A.)

BAR ADMISSIONS

Pennsylvania
United States District Court for the Eastern District of Pennsylvania
United States District Court for the Middle District of Pennsylvania

AREAS OF PRACTICE

Construction Law
Employment Discrimination
Labor and Employment
Municipal Law
Right-to-Know Law
Solicitor Services
Special Education
Student Services

LATEST NEWS

School Counseling Video: "Do parents have a right to keep students home from school if they don't feel that school is safe?," 11/20/24
Sweet Stevens Attorneys Offer Insights for PA Bar's School Law Update, 11/18/24
Sweet Stevens Attorneys to Speak at Pennsylvania Bar School Law Update, 11/13/23

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MARIA B. DESAUTELLE

Senior Associate

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email: mdesautelle@sweetstevens.com



Maria Desautelle brings a diverse legal background to her practice in representing school entities, primarily in the area of special education. She is an accomplished attorney with broad experience in litigation, mediation and investigation.

Ms. Desautelle has an extensive background working for several government entities. Prior to joining the firm, she served as a mediator and complaint investigator with the New Jersey Department of Education – Office of Special Education. Ms. Desautelle also worked as a deputy attorney general with the New Jersey Department of Law and Public Safety representing both the Department of Human Services and the Department of Military and Veterans Affairs. She further served as the legislative liaison for the New Jersey Department of Military and Veterans Affairs.

Ms. Desautelle has also worked in private practice representing several major telecommunications companies in municipal land use matters. Additionally, Ms. Desautelle served as a Deputy Staff Judge Advocate for the United States Air Force, New Jersey Air National Guard, 108th Air Refueling Wing.

EDUCATION

Widener University School of Law (J.D.)

The Pennsylvania State University (B.S.)

United States Air Force Judge Advocate General's School,

Maxwell Air Force Base

AREAS OF PRACTICE

Special Education

MEMBERSHIPS

Pennsylvania Bar Association

Pennsylvania School Board Solicitors Association

BAR ADMISSIONS

Pennsylvania

New Jersey

United States District Court for the Eastern District of

Pennsylvania

United States District Court for the Middle District of Pennsylvania

United States District Court for the District of New Jersey

United States Court of Appeals for the Third Circuit

United States Supreme Court

LATEST NEWS

School Counseling Video: What is a Child Find Trigger?, 8/19/25

Sweet Stevens Attorneys to Appear at National CASE Conference, 10/29/24

Sweet Stevens Promotes Two Attorneys, 1/18/24

Sweet Stevens Attorneys Present at National CASE Conference, 11/3/23

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JASON D. FORTENBERRY

Partner

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Jason Fortenberry advises clients on special education issues, Section 504 matters, Americans with Disability Act violations, and other disability discrimination claims. While in his current role he advocates solely for school entities, he has also represented students and their families in such matters, bringing a valuable dual perspective to his work in education law. He frequently presents educational programs on a variety of topics in special education.

Jason's professional experience also includes work as an attorney at a legal service agency in Pennsylvania and for the State of New Jersey, Office of Administrative Law. He was also an extern for the Honorable Gloria M. Burns, U.S. Bankruptcy Court for the District of New Jersey and an intern for the Honorable Marlene F. Lachman, Philadelphia Court of Common Pleas.

In law school, he received the Mary Philbrook Student Public Interest Award and was a Marshall-Brennan Constitutional Literacy Fellow, where he taught a course in constitutional law at Camden High School. He currently serves on the board of directors of the Archdiocese of Philadelphia Schools of Special Education and is a commissioner on the Conshohocken Human Relations Commission.

EDUCATION

Rutgers University School of Law (J.D.)
University of Alabama (B.S.)

BAR ADMISSIONS

Pennsylvania
New Jersey
United States District Court for the Eastern District of Pennsylvania
United States District Court for the Middle District of Pennsylvania
United States District Court District of New Jersey
United States Court of Appeals for the Third Circuit

AREAS OF PRACTICE

Civil Rights Defense
Special Education
Student Services

MEMBERSHIPS

Pennsylvania Bar Association
Pennsylvania School Board Solicitors Association

LATEST NEWS

School Counseling Video: "What Rights Do Sexual Assault Victims Have to Be Separated From Perpetrators?" 10/23/25
Sweet Stevens Announces Attorney Promotions, 1/22/25

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Kalani Linnell Asroff is an experienced education law practitioner with a keen understanding of the issues from both a legal and practical standpoint. She advises clients in matters involving special education, student civil rights, and operations/practices.

In the years before joining the firm, Kalani worked with law firms with significant education law practices. She also worked as an investigator and hearing officer for a consulting firm that advised educational institutions in major areas of legal compliance. She also worked as a teacher in a large Pennsylvania school district prior to attending law school. As such, she has a deep understanding of the challenges teachers and administrators face on a daily basis in terms of discipline, safety, and plan/goal implementation.

She is especially dedicated to the issue of Title IX compliance, including having knowledge of the currently applicable 2020 Regulations as well as historical and recent Title IX trends. She completes training annually with the Association of Title IX Administrators to serve her clients officially and compliantly in the roles of Title IX Coordinator, Title IX Investigator, Title IX Decisionmaker, and Title IX Appeal Decisionmaker. Additionally, she counsels other attorneys at the firm when they are called upon to conduct client informational gatherings on this topic. In 2020, she was invited to join a select group of attorneys providing Title IX guidance on the rules to the State University of New York. She also advised the Pennsylvania School Board Association on model policies relating to Title IX, and she regularly delivers live presentations on the subject to schools, professional associations, and fellow attorneys.

She maintains a constant commitment to professional development by seeking opportunities to learn, grow and share through client in-service training, writing legal alerts and articles on cutting-edge topics, and presenting live continuing legal education programs and seminars. She also works to share that knowledge with those aspiring to legal careers as an adjunct professor at Thomas Jefferson University, where she teaches legal research, writing, and oral argument to undergraduate pre-law majors.

EDUCATION

Drexel University, Thomas R. Kline School of Law (J.D., *cum laude*)

West Chester University of Pennsylvania (B.S.Ed., *magna cum laude*)

BAR ADMISSIONS

Pennsylvania

United States District Court, Eastern District of Pennsylvania

United States District Court, Middle District of Pennsylvania

United States Court of Appeals, Third Circuit

LATEST NEWS

Sweet Stevens Planning, Presenting at Exceptional Children Conference, 10/16/25

Linell Asroff to Guide PA Principals on Conducting Legally Sound School Investigations, 7/14/25

School Counseling Video: May Schools Immediately Suspend a Student Who is Suspected of a Title IX Violation?, 4/14/25

Sweet Stevens to Share Insights at 2025 PAPSA Conference, 3/31/25

Kalani Linnell article: The Shaping and Reshaping of Title IX, 3/3/25

AREAS OF PRACTICE

Audit of Operations and Practices

Civil Rights Defense

Right-to-Know Law

Special Education

Student Services

SOUTHEAST REGION

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SWEET | STEVENS | KATZ | WILLIAMS

SHAWN D. LOCHINGER

Partner

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fax: (717) 641-9026

email: slochinger@sweetstevens.com



Shawn Lochinger joined the firm in 2015 with a comprehensive background in special education law and labor and employment law as it relates to school entities. He has extensive experience in due process hearings, in giving day-to-day advice on special education matters, and in working with clients to resolve situations that arise in the special education field. Shawn also has a strong knowledge of gifted matters and has spoken frequently on all of these subjects.

He has served as a hearing officer for gifted education as well as expulsion hearings and in student discipline cases, and has represented clients at the administrative level and in federal court, before the Pennsylvania Human Relations Commission, the EEOC, the OFCCP, and unemployment compensation referees.

He regularly conducts in-house training sessions on sexual harassment, employment discrimination, special education and numerous other employment and education law topics, and speaks at conferences around the region for such entities as the Pennsylvania Bar Institute and the Pennsylvania Association for Gifted Education.

EDUCATION

Duke University School of Law (J.D.)

Washington & Jefferson College (B.A.)

BAR ADMISSIONS

Pennsylvania

United States District Court for the Eastern District of Pennsylvania

United States District Court for the Middle District of Pennsylvania
United States Court of Appeals for the Third Circuit

AREAS OF PRACTICE

Employment Discrimination

Labor and Employment

Right-to-Know Law

Solicitor Services

Special Education

Student Services

MEMBERSHIPS

Pennsylvania School Boards Association

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SWEET | STEVENS | KATZ | WILLIAMS

ROSE E. McHUGH

Senior Associate

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email: rmchugh@sweetstevens.com



Rose McHugh centers her practice in the areas of special education and student services.

Before joining the firm, she spent several years with the Bucks County District Attorney's Office, most recently serving as interim chief of the Juvenile Division, where she supervised the work of other attorneys and liaised with members of the judiciary to efficiently adjudicate criminal prosecutions.

Additional roles in that office including serving in the Special Victims Division, investigating and prosecuting offenders charged with offenses against children; as Mental Health Liaison, participating in yearly commitment hearings of individuals found not guilty by reason of insanity for various crimes and also determining placement or treatment for individuals prosecuted for crimes who were found not fit to stand trial; and with the Narcotics Division, prosecuting individuals involved in illegal drug sales.

That, coupled with her prior work with the Montgomery County Adult Probation and Parole Department, affords her a special aptitude in litigation and negotiation and zealously advocating for her client's position.

EDUCATION

Widener University School of Law (J.D.)
Cabrini College (B.A.)

AREAS OF PRACTICE

Special Education
Student Services

BAR ADMISSIONS

Pennsylvania
New Jersey
United States District Court for the Eastern District of Pennsylvania
United States District Court for the Middle District of Pennsylvania

LATEST NEWS

Kelin, McHugh to Address Religious Rights in Schools at PSBSA Annual Workshop, 9/18/25
Sweet Stevens Secures Favorable Ruling for District Challenged over Student's Discipline, 2/19/25
School Counseling Newest Video: What Should a Parent Look for in IEP Goal Progress Monitoring?, 1/7/25
Sweet Stevens Attorneys to Appear at National CASE Conference, 10/29/24
Sweet Stevens Promotes Two Attorneys, 1/18/24

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SHARON W. MONTANYE

Managing Partner

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email: smontanye@sweetstevens.com



Sharon Wolff Montanye has earned a reputation with our clients as a powerful advocate in special education litigation and a knowledgeable and thoughtful advisor. While many of the issues facing school districts or other school entities remain constant, countless other influences shape how those issues must be addressed: federal and state mandates, state funding limitations, academic and technological innovations and expectations for governance all directly impact the ability of public school entities to deliver high quality education. Helping school board directors, superintendents and other administrators understand how to apply the myriad of legal requirements facing them is the core of her practice. Sharon has spoken widely to audiences of educators and attorneys, both in school entities and for such organizations as the Pennsylvania Bar Institute and the Pennsylvania Association of Pupil Service Administrators.

Prior to joining the practice of law, she spent nearly a dozen years working in the field of education as a certified teacher, administrator, grant writer, and peer reviewer for both the United States Department of Education and the Pennsylvania Department of Education.

Additionally, she has volunteered her time with a number of professional and community organizations, including the New Horizons Montessori School, Aldie Counseling Foundation and The Council for Exceptional Children.

EDUCATION

Temple University School of Law (LL.M., Taxation)

Temple University School of Law (J.D.)

Temple University (M.Ed., summa cum laude)

Arcadia University (B.A.)

BAR ADMISSIONS

Pennsylvania

New Jersey

United States District Court for the Eastern District of

Pennsylvania

United States District Court for the Middle District of Pennsylvania

AREAS OF PRACTICE

Construction Law

Municipal Law

Right-to-Know Law

Solicitor Services

Special Education

Student Services

Tax Assessment Appeals

MEMBERSHIPS

Pennsylvania Bar Association

Pennsylvania School Boards Association

LATEST NEWS

Recent Supreme Court Decision Concerning Religious Freedom in Schools, 7/15/25

Sweet Stevens to Share Insights at 2025 PAPSA Conference, 3/31/25

School Counseling Video Installment: Can Board Members Block or Delete Social Media Comments?, 2/14/25

Sweet Stevens to Deliver Legal Session for PA School Administrators at PAPSA Conference, 4/4/24

Sweet Stevens to Present 20th Annual Stevens Memorial Legal Seminar at '23 PAPSA Conference, 3/27/23

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SWEET | STEVENS | KATZ | WILLIAMS

SUZANNE PONTIOUS

Senior Associate

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fax: (215) 348-1147

email: spontious@sweetstevens.com



Suzanne Pontious joined Sweet, Stevens, Katz & Williams in 2020. She has worked in both the public and private sector and is a seasoned litigator, both in court and administrative proceedings.

Before joining the firm, Sue served as deputy city solicitor for the City of Philadelphia Law Department's Child Welfare Unit. There, she managed a high-volume caseload of dependency matters in various stages of litigation. As a core courtroom team captain, she trained and supervised new attorneys on her team. She also conducted CLEs and attorney trainings.

Prior to that, Sue worked at a private law firm that served as solicitor for various municipalities, including school districts and other public entities.

She is also a veteran of the Bucks County District Attorney's Office, having served as a legal intern during law school. After law school, she clerked for the Honorable Diane E. Gibbons, Bucks County Court of Common Pleas.

EDUCATION

Temple University Beasley School of Law (J.D.)

University of Delaware (B.A.)

BAR ADMISSIONS

Pennsylvania

New Jersey

United States District Court for the Eastern District of

Pennsylvania

United States District Court for the District of New Jersey

AREAS OF PRACTICE

Civil Rights Defense

Special Education

Student Services

MEMBERSHIPS

Pennsylvania School Board Solicitors Association

LATEST NEWS

Sweet Stevens to Share Insights at 2025 PAPSA Conference, 03/31/25

Sweet Stevens Announces Attorney Promotions, 01/22/25

Sweet Stevens to Deliver Legal Session for PA School Administrators at PAPSA Conference, 04/04/24

Sweet Stevens Attorneys Present at National CASE Conference, 11/03/23

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KARL A. ROMBERGER, JR.

Partner

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Karl Romberger advises school entities about special education, student services, school-behavioral health placement reimbursement disputes, civil rights, policy development, contracts and service provider arrangements. He also represents educational institutions in administrative hearings, including special education cases, MOU reimbursement actions, and actions before the U.S. Department of Education's Office for Civil Rights and the Pennsylvania Human Relations Commission, and litigation in both state and federal courts. Karl provides regular consultations through the firm's Pool Counsel program and also provides staff in-service presentation trainings on special education and student services topics. He is a regular presenter before various continuing legal education audiences and is also trained as a special education hearing officer with the U.S. Virgin Islands Department of Education.

Prior to joining the firm, Karl was a permanent Federal Law Clerk to Hon. E. Mac Troutman of the U.S. District Court, Eastern District of Pennsylvania, and also served as a Pennsylvania Special Education Hearing Officer, in addition to working for a large Philadelphia-based national law firm.

His personal educational background includes study-abroad in Scotland, holding the position of Board Member and Business Manager of The Dickinson Journal of International Law, receiving the Comparative Law Award, and interning for the United Nations Commission on International Trade Law in Vienna, Austria.

EDUCATION

Dickinson School of Law of the Pennsylvania State University (J.D.)
Moravian College (B.A.)

BAR ADMISSIONS

Pennsylvania
United States District Court for the Eastern District of Pennsylvania
United States District Court for the Middle District of Pennsylvania
United States Court of Appeals for the Third Circuit
United States Supreme Court

AREAS OF PRACTICE

Civil Rights Defense
Special Education
Student Services

MEMBERSHIPS

Pennsylvania Bar Association
Pennsylvania School Board Solicitors Association
Federal Bar Association
Board of Trustees of the Easttown Library and Information Center

LATEST NEWS

Sweet Stevens Planning, Presenting at Exceptional Children Conference, 10/16/25
Sweet Stevens Prevails in "Age 22" Multi-District Suit, 5/16/25
Attorneys from Sweet Stevens Deliver Presentation to York County Student Complex Needs Fair, 11/12/24
Sweet Stevens Successfully Defends School District Against Abuse Allegations, 8/2/24
Sweet Stevens Successfully Defends School District in Challenge from 21-Year-Old Student, 5/6/24

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MARCIE M. ROMBERGER

Of Counsel

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Marcie Romberger concentrates her work in the areas of Special Education, Student Services and Civil Rights Defense. Her clients benefit from her extensive background in business, the private practice of law, education, and government. In education law, she brings the valuable perspective of having worked in law firms on behalf of both students/families and school entities.

Just prior to joining the firm, she ran a successful retail business, overseeing human resources, sales, finance, customer service, marketing and overall operations.

She has also worked for the Office of Dispute Resolution (ODR) in Harrisburg, reviewing Special Education law, presiding over Due Process hearings, and writing decisions on same. She also served as director of the ODR office for several years, managing and instructing staff and officers. She has also taught Special Education classes at Lehigh Carbon Community College and Albright College.

Upon her admission to the bar, she worked for the Lehigh County District Attorney's Office as an assistant district attorney in the Child Abuse, Sex Crimes and Domestic Violence Division. She also served as a judicial clerk to the Honorable John Backenstoe.

EDUCATION

The Dickinson School of Law (J.D.)

Moravian College (B.A.)

AREAS OF PRACTICE

Civil Rights Defense

Special Education

Student Services

BAR ADMISSIONS

Pennsylvania

United States District Court for the Eastern District of

Pennsylvania

United States District Court for the Middle District of Pennsylvania

LATEST NEWS

Attorneys from Sweet Stevens Deliver Presentation to York County Student Complex Needs Fair, 11/12/24

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JASON P. SAM

Associate

phone: (215) 345-9111

fax: (215) 348-1147

email: jsam@sweetstevens.com



Jason Sam joined the firm in 2021. He will put his background in trial practice to work to obtain successful outcomes for clients in civil rights, special education, contract disputes, employment law, and tax assessment matters.

He came to the firm from the Philadelphia District Attorney's Office, a high volume, high pressure environment, working in both the Motions Court Pre-Trial Unit and the Municipal Court Unit. In these roles, he successfully balanced a substantial caseload with proactive client communication and interaction, all while mentoring interns and new hires and managing other duties.

During law school, he completed internships at a Washington, D.C. law firm and the Kings County District Attorney's Office in Brooklyn, N.Y.

EDUCATION

American University Washington College of Law (J.D.)

Temple University College of Liberal Arts (B.A.)

BAR ADMISSIONS

Pennsylvania

United States District Court for the Eastern District of

Pennsylvania

United States District Court for the Middle District of Pennsylvania

AREAS OF PRACTICE

Civil Rights Defense

Employment Discrimination

Tax Assessment Appeals

MEMBERSHIPS

Pennsylvania School Board Solicitors Association, Member

Pennsylvania Bar Association, Member

LATEST NEWS

Sweet Stevens Planning, Presenting at Exceptional Children Conference, 10/16/25

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TAMMY J. SCHMITT

Senior Associate

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email: tschmitt@sweetstevens.com



Tammy Schmitt joined Sweet, Stevens, Katz & Williams in 2020. In practice for close to two decades, she brings extensive experience in her chosen areas of practice from both sides of the negotiation table.

Just prior to joining the firm, she worked with a private law firm that represented families of students with educational disabilities in their claims against school entities. There, she handled an extensive caseload, handling all aspects of litigation. Prior to that, she litigated both special education matters and cases involving civil rights and employment discrimination on behalf of school and public entities. Additionally, she served as managing attorney for another former law firm, responsible for her own caseload of complex litigation matters while supervising all legal staff, which included attorneys, paralegals and independent contractors.

She has been named to both the Pennsylvania Super Lawyers and Pennsylvania Super Lawyer Rising Star lists, and she is often called upon to present at conferences, both live and virtual, on topics related to Special Education.

EDUCATION

Temple University Beasley School of Law (J.D.)
Temple University (B.A. cum laude, M.A.)

BAR ADMISSIONS

Pennsylvania
United States District Court for the Eastern District of Pennsylvania
United States District Court for the Middle District of Pennsylvania
Supreme Court of Pennsylvania

LATEST NEWS

Sweet Stevens Announces Attorney Promotions, 1/22/25
Cola, Schmitt to Present at PA Special Education Leadership Symposium 9/5/23
Sweet Stevens Welcomes New Attorneys 1/19/21

AREAS OF PRACTICE

Civil Rights Defense
Special Education
Student Services

MEMBERSHIPS

Pennsylvania School Board Solicitors Association

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SWEET | STEVENS | KATZ | WILLIAMS

CHRISTINA M. STEPHANOS

Partner

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fax: (215) 348-1147

email: cstephanos@sweetstevens.com



Christina Stephanos brings a powerful and multifaceted professional perspective to her practice: in addition to her law degree, she earned a diploma in Special Education, certificates in both Reading and Elementary Education and taught Language Arts and Special Education for six years.

Her practice involves ongoing consultation and representation of school districts in a variety of matters, including but not limited to IEP and Section 504 meetings and due process administrative hearings. She also prepares and presents special education audits with specific recommendations for overall programming, staffing and supports. She also provides in-house professional development programs on a variety of topics, including mock due process hearings, discipline, special education programming, the role of the local educational agency, and inclusion.

Prior to joining the firm, she served as a staff attorney for the Defender Association of Philadelphia, Child Advocacy Unit and as an assistant district attorney in the Bucks County District Attorney's Office.

EDUCATION

Rutgers University School of Law (J.D.)

Rowan University (B.A.)

BAR ADMISSIONS

Pennsylvania

New Jersey

United States District Court for the Eastern District of

Pennsylvania

United States District Court for the Middle District of Pennsylvania

United States Court of Appeals for the Third Circuit

AREAS OF PRACTICE

Audit of Operations and Practices

Civil Rights Defense

Special Education

Student Services

MEMBERSHIPS

Pennsylvania Bar Association

Pennsylvania School Board Solicitors Association

LATEST NEWS

Attorney Christina Stephanos Helps Prepare Students for Federal Mock Trial, 5/19/25

Sweet Stevens Attorneys to Appear at National CASE Conference, 10/29/24

Sweet Stevens Attorneys Present at National CASE Conference, 11/3/23

Sweet Stevens Case Win Highlighted in National Special Education Publication, 6/1/23

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REBEKAH A. VAN DER WERF

Associate

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email: rvanderwerf@sweetstevens.com



Rebekah Van Der Werf focuses her practice on education law with an emphasis on special education. She has a wealth of valuable courtroom experience and a strong foundation in advocacy developed through her prior work in the criminal justice system.

Before joining the firm, Rebekah served as an assistant district attorney in Bucks County, Pennsylvania in the Drugs and Firearms Crimes unit. In that role, she investigated, presented, and negotiated a wide range of criminal cases, handling matters from pre-charging through post-disposition. She collaborated closely with law enforcement, tried numerous cases before both judges and juries, and oversaw the county's Veterans Treatment Court, ensuring its compliance with state standards. Her experience working directly with victims and mentoring junior attorneys helped her develop the communication, problem-solving, and organizational skills that now serve her well in representing school clients.

Rebekah also gained early legal experience as a certified legal intern with both the Montgomery County District Attorney's Office and the Temple University Family Law Clinic. These positions allowed her to refine her litigation skills, engage in client advocacy, and gain exposure to sensitive issues involving families and children -- an experience that informs her practice in special education law.

EDUCATION

Temple University Beasley School of Law (J.D.)
Liberty University (B.S.)

AREAS OF PRACTICE

Special Education

BAR ADMISSIONS

Pennsylvania

LATEST NEWS

Sweet Stevens Welcomes Rebekah Van Der Werf, 12/8/25

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SWEET | STEVENS | KATZ | WILLIAMS

THOMAS C. WARNER

Partner

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fax: (215) 348-1147

email: twarner@sweetstevens.com



Tom Warner co-chairs the firm's special education department, where he focuses primarily on the representation of numerous Pennsylvania school districts in matters of special education. While he devotes much of his practice to special education litigation at the administrative and appellate levels, he also spends a significant amount of time providing in-service training to school districts regarding various matters, including the development of defensible special education programming and confidentiality/disclosure issues involving education records.

He also frequently presents at conferences focused on special education legal issues. Tom has served as a co-chair of the Pennsylvania Bar Association's Exceptional Children's Conference committee since 2016. In that capacity, his primary role is planning the annual Exceptional Children's Conference, where members of the special education law bar gather yearly to sharpen their skills during a full day of continuing legal education.

Prior to joining the firm, Tom served as a law clerk for a small firm in Pittsburgh, Pennsylvania and interned for the Allegheny County Law Department. He was born in Baltimore, Maryland and raised in the Baltimore suburbs, and now resides with his wife and three children in Bucks County.

EDUCATION

Duquesne University School of Law (J.D.)
Dickinson College (B.A., magna cum laude)

BAR ADMISSIONS

Pennsylvania

AREAS OF PRACTICE

Special Education
Student Services

MEMBERSHIPS

Pennsylvania Bar Association
Pennsylvania School Board Solicitors Association

LATEST NEWS

Sweet Stevens Planning, Presenting at Exceptional Children Conference, 10/16/25
School Counseling Video: "Can Students Who Are 18 Years of Age or Older Make Their Own IEP Decisions?" 9/25/25
Sweet Stevens to Share Insights at 2025 PAPSA Conference, 3/31/25
2024 Exceptional Children Conference to Feature Sweet Stevens Attorneys, 10/8/24
Sweet Stevens to Deliver Legal Session for PA School Administrators at PAPSA Conference, 4/4/24

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HILLARY P. WEXLER

Associate

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fax: (215) 348-1147

email: hwexler@sweetstevens.com



Hillary Wexler's practice focuses on the areas of special education and student services.

Her past experience includes work in private practice, as an assistant district attorney for the Bucks County District Attorney's Office, and as a law clerk to the Honorable Richard P. Haaz in the Court of Common Pleas of Montgomery County, and also to the Honorable Kelly L. Banach in the Court of Common Pleas of Lehigh County. Additionally, she served for four years as conflicts counsel for the Court of Common Pleas of Lehigh County, where she advocated for juvenile clients charged with felonies and/or misdemeanor crimes in delinquency court and also served as juvenile legal counsel and guardian ad litem in dependency court.

She is an efficient communicator who thrives in high-pressure, time-sensitive situations, and strives to serve clients with respect, attention to detail and compassion.

She has volunteered for a number of community causes, including serving as a volunteer instructor for the North Penn School District Civics Program, in several leadership roles for the Oak Ridge Elementary Home and School Association (including serving as president for two years), and as a volunteer at the So Much to Give Inclusive Café in Cedars, PA, which creates employment opportunities for young adults with disabilities.

EDUCATION

Temple University School of Law (J.D.)

Tufts University (B.A.)

AREAS OF PRACTICE

Special Education

Student Services

BAR ADMISSIONS

Pennsylvania

United States District Court for the Eastern District of Pennsylvania

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PHONE 570 512 1440 | FAX 570 512 1442

JANE M. WILLIAMS

Partner

phone: (215) 345-9111

fax: (215) 348-1147

email: jwilliams@sweetstevens.com



With over 25 years in practice, Jane Williams is among the most experienced attorneys currently representing school entities in special education and student matters. She has served as a hearing officer and advisor to school boards in student expulsion matters, and provided school district boards with in-service programs concerning special education and pupil services. She provides both proactive and defense representation to school entities in all phases of special education litigation.

She is a well-regarded speaker and consultant on special education and other education law-related topics, having lectured statewide to a variety of organizations consisting of both educators and attorneys. She has served for years as a planning committee member of the Lehigh University College of Education Special Education Law Symposium, and participated as a moderator and presenter over the years.

Jane has served in several leadership roles in the Pennsylvania School Board Solicitors Association, including that of President. She is a member of the Pennsylvania Bar Association.

EDUCATION

Emory University School of Law (J.D.)

Northwestern University (B.A.)

Sullins College (A.A.)

BAR ADMISSIONS

Pennsylvania

United States District Court for the Eastern District of Pennsylvania

United States District Court for the Middle District of Pennsylvania

United States Court of Appeals for the Third Circuit

AREAS OF PRACTICE

Special Education

Student Services

MEMBERSHIPS

Pennsylvania Bar Association

Pennsylvania School Board Solicitors Association (Past President)

LATEST NEWS

Sweet Stevens Attorneys to Appear at National CASE Conference, 10/29/24

Sweet Stevens to Deliver Legal Session for PA School Administrators at PAPSA Conference, 4/4/24

Sweet Stevens Attorneys Present at National CASE Conference, 11/3/23

Sweet Stevens to Present 20th Annual Stevens Memorial Legal Seminar at '23 PAPSA Conference, 3/27/23

2022 PAPSA Conference to Again Feature Paul Stevens Memorial Legal Seminar, 3/30/22

SOUTHEAST REGION

331 East Butler Avenue, New Britain, PA 18901

PHONE 215 345 9111 | FAX 215 348 1147

CENTRAL REGION

P.O. Box 956, Hershey, PA 17033

PHONE 717 641 9025 | FAX 717 641 9026

NORTHEAST REGION

250 Kennedy Boulevard, Suite 1, Pittston, PA 18640

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NORTHERN TIER REGION

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Client References

Currently we serve as solicitor to 22 school districts, 3 vocational schools and 3 intermediate units. A listing of school clients we provide solicitor services to including the length and types of services is attached. Additionally, please see the attached list of school and municipal entities for whom we have worked in the past three years.

SOUTHEAST REGION

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Public School Clients

Solicitor Appointment

Abington Heights School District

12/13/2016

Dr. Christopher Shaffer, District Superintendent
200 East Grove Street
Clarks Summit PA 18411-1776
570-586-2511
shafferc@ahsd.org
Services Provided: Solicitor, Labor,
Employment, Special Education, Pupil
Personnel and Tax Assessment Appeals

Benton Area School District

4/21/1986

Mr. James Geffken, District Superintendent
600 Green Acres Road
Benton, PA 17814
570-925-6651
jgeffken@bentonsd.org
Services Provided: Solicitor, Special
Education, Pupil Personnel, Labor and
Employment

Blue Ridge School District

6/22/1995

Mr. Matthew Button, District Superintendent
5150 School Road
New Milford, PA 18834
570-465-3141, Ext. 604
buttonma@brsd.org
Services Provided: Solicitor, Employment,
Labor, Special Education and Pupil Personnel

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NORTHERN TIER REGION

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Bucks County Intermediate Unit No. 22

3/14/1980

Dr. Mark Hoffman, Executive Director
705 Shady Retreat Road
Doylestown, PA 18901
215-348-2940, Ext. 1600
mhoffman@bucksiu.org
Services Provided: Solicitor, Special
Education, Pupil Personnel, Employment,
Labor Right-to-Know and Pool Counsel

Bucks County Technical High School

1/1/1985

Mr. Henry DeGeorge, Administrative Director
610 Wistar Road
Fairless Hills, PA 19030
215-949-1700, Ext. 2954
hdegeorge@BCTHS.com
Services Provided: Solicitor, Labor, Special
Counsel and Pool Counsel

Canton Area School District

1/1/2018

Dr. Amy Martell, District Superintendent
509 E. Main Street
Canton, PA 17724
570-673-3983
amartell@canton.k12.pa.us
Services Provided: Solicitor, Special Counsel

Elk Lake School District

3/23/1984

Mr. Bob Galella, District Superintendent
2380 Elk Lake School Road
Springville, PA 18844
570-278-1106, Ext. 712
Bob.galella@elklakeschool.org
Services Provided: Solicitor, Employment,
Special Education and Pupil Personnel

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Exeter Township School District

7/20/2017

Dr. Christy Haller, District Superintendent
200 Elm Street
Reading, PA 19606
610-898-9584
cmhaller@exetersd.org
Services Provided: Solicitor, Special Education,
Pupil Personnel, Tax Assessment Appeals,
Employment, Labor and Pool Counsel

Kutztown Area School District

2/11/1995

Mr. Christian Temchatin, District Superintendent
251 Long Lane
Kutztown, PA 19530
610-683-7361, Ext. 139
ctemchatin@kasd.org
Services Provided: Solicitor, Employment and
Labor

Lackawanna Trail School District

4/21/2010

Mr. Matthew Rakauskas, District Superintendent
R.D. 1, Box 85
Factoryville, PA 18419
570-945-5184
rakauskasm@ltsd.org
Services Provided: Solicitor, Labor, Special
Education, Pupil Personnel and Tax Assessment
Appeals

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NORTHERN TIER REGION

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Lower Moreland Township School District

2/24/1987

Dr. Dennis Best, District Superintendent
2551 Murray Avenue
Huntingdon Valley, PA 19006
215-938-0272
dbest@lmtsd.org
Services Provided: Solicitor, Tax Assessment
Appeals, Special Education, Pupil Personnel,
Employment, Labor and Pool Counsel

Montrose Area School District

7/6/1998

Mr. Christopher McComb, District Superintendent
273 Meteor Way
Montrose, PA 18801
570-278-6212
cmccomb@masd.info
Services Provided: Solicitor, Labor, Special
Education, Pupil Personnel, Tax Assessment
Appeals and Pool Counsel

Northeast Bradford School District

5/10/2011

Mr. Matthew A. Holmes, District Superintendent
526 Panther Lane
Rome, PA 18837
570-744-2521, Ext. 2203
mholmes@nebpanthers.com
Services Provided: Solicitor, Special Counsel,
Labor

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NORTHERN TIER REGION

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PHONE 570 512 1440 | FAX 570 512 1442

Northeastern Educational Intermediate Unit #19

6/1/2011

Dr. Kathleen Sottile, Executive Director
1200 line Street
Archibald, PA 18403
570-876-9200
ksottile@iu19.org
Services Provided: Solicitor, Employment, Labor,
Special Education, Pupil Personnel and Pool
Counsel

Northeastern School District

10/15/2024

Dr. Jason Bottiglieri, District Superintendent
41 Harding Street
Manchester, PA 17345
717-266-3667
bottiglierij@nebobcats.org
Services Provided: Solicitor, Labor, Employment,
Special Counsel, Special Education, Pupil
Personnel and Pool Counsel

Northern Tier Career Center

5/16/2011

Mr. Gary Martell, Executive Director
120 Career Center Lane
Towanda, PA 18848
570-265-8111
gmartell@ntccschool.org
Services Provided: Solicitor, Special Counsel

SOUTHEAST REGION

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NORTHERN TIER REGION

30 Taylor Street, Suite B, Troy, PA 16947
PHONE 570 512 1440 | FAX 570 512 1442



Palisades School District

9/28/1989

Dr. Bridget O'Connell, District Superintendent
39 Thomas Free Drive
Kintnersville, PA 18930
610-847-5131, Ext. 4030
boconnell@palisadesd.org
Services Provided: Solicitor, Labor, Employment,
Special Counsel, Special Education, Tax
Assessment Appeals and Right to Know

Palmerton Area School District

10/8/2012

Mrs. Angela Friebolin, District Superintendent
680 Fourth Street
Palmerton, PA 18071
610-826-7101, Ext. 5011
afriebolin@palmerton.org
Services Provided: Solicitor, Employment, Special
Counsel, Special Education and Pool Counsel

Schuylkill Intermediate Unit 29

5/5/2025

Ms. Shannon Brennan, Assistant Executive Director
Box 130, 17 Maple Avenue
MarLin, PA 17951
570-544-9131
sbrennan@iu29.org
Services Provided: Solicitor, Labor, Employment,
Special Counsel, Special Education, Title IX, Right
to Know and Pool Counsel

SOUTHEAST REGION

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Sullivan County School District

2/15/2022

Ms. Samantha Kahler, District Superintendent
777 South Main Street
Laporte, PA 18626
570-946-8200
kahlsama@sulcosd.k12.pa.us
Services Provided: Solicitor, Special Education and
Pupil Personnel

Towanda Area School District

5/15/1985

Mr. Erick Cummings, District Superintendent
410 State Street
Towanda, PA 18848
570-265-9154
ECummings@tsd.k12.pa.us
Services Provided: Solicitor, Employment, Labor
and Tax Assessment Appeals

Tunkhannock Area School District

6/19/2015

Mr. Paul Dougherty, District Superintendent
41 Philadelphia Avenue
Tunkhannock, PA 18657
570-836-3111, Ext. 1024
Paul.Dougherty@tasd.net
Services Provided: Solicitor, Labor, Employment,
Special Education, Pupil Personnel, Tax
Assessment Appeals and Right to Know

Upper Bucks County Technical School

1/20/1997

Dr. Michael Herrera, Executive Director
3115 Ridge Road
Perkasie, PA 18944
215-795-2911, Ext. 201
mherrera@ubtech.org
Services Provided: Solicitor, Special Counsel,
Labor and Employment

SOUTHEAST REGION

331 East Butler Avenue, New Britain, PA 18901
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NORTHERN TIER REGION

30 Taylor Street, Suite B, Troy, PA 16947
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William Penn School District

12/8/2009

Dr. Eric J. Becoats, District Superintendent

100 Green Avenue Annex

Lansdowne, PA 19050

610-284-8005, Ext. 1236

ebecoats@wpsd.k12.pa.us

Services Provided: Solicitor, Special Education,

Pupil Personnel, Tax Assessment Appeals, Labor,

Employment and Pool Counsel

Wyalusing Area School District

6/4/1987

Mr. Gary Otis, District Superintendent

11450 Wyalusing New Albany Road

Wyalusing, PA 18853

570-746-1605, Ext. 3009

gotis@wyalusingrams.com

Services Provided: Solicitor, Special Education,

Pupil Personnel, Employment and Labor

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CLIENT REFERENCES

Adams

Lincoln I.U. #12

Allegheny

Allegheny I.U. #3

Beaver

Beaver Valley I.U. #27

Bedford

Appalachia I.U. #8

Berks

Antietam School District
Berks County I.U. #14
Brandywine Heights Area School District
Conrad Weiser Area School District
Daniel Boone Area School District
Exeter Township School District **
Fleetwood Area School District
Governor Mifflin School District
Hamburg Area School District
Kutztown Area School District **
Muhlenberg School District
Oley Valley School District
Schuylkill Valley School District
Tulpehocken Area School District
Twin Valley School District
Wilson School District
Wyomissing Area School District

Bradford

Athens Area School District
Canton Area School District **
Northeast Bradford School District **
Northern Tier Career Center **
Towanda Area School District **
Troy Area School District
Wyalusing Area School District **

Bucks

Bensalem Township School District
Bristol Borough School District
Bristol Township School District
Bucks County I.U. #22 **
Bucks County Technical High School **
Centennial School District
Central Bucks School District
Council Rock School District
Middle Bucks Institute of Technology
Morrisville School District
Neshaminy School District
New Hope Solebury School District
Palisades School District **
Pennridge School District
Pennsbury School District
Quakertown Community School District
Upper Bucks County Technical School **

Carbon

Lehigh Area School District
Palmerton Area School District **
Panther Valley School District
Weatherly Area School District

Centre

Central I.U. #10
State College Area School District

Chester

Avon Grove School District
Chester County I.U. #24
Coatesville Area School District
Downingtown Area School District
Kennett Consolidated School District
Octorara Area School District
Owen J. Roberts School District
Phoenixville Area School District
Unionville-Chadds Ford School District
West Chester Area School District

Clarion

Riverview I.U. #6

Columbia

Benton Area School District **
Berwick Area School District
Bloomsburg Area School District
Columbia-Montour Area Vo-Tech School
Millville School District

Crawford

Northwest Tri-County I.U. #5

Cumberland

Capital Area I.U. #15
Cumberland Valley School District

Dauphin

Derry Township School District
Upper Dauphin Area School District

Delaware

Chester Upland School District
Delaware County I.U. #25
Garnet Valley School District
Radnor Township School District
Springfield School District
William Penn School District **

Franklin

Chambersburg Area School District

Lackawanna

Abington Heights School District **
Lakeland School District
Northeastern Educational I.U. #19 **
Old Forge School District

Lancaster

Cocalico School District
Columbia Borough School District
Donegal School District
Eastern Lancaster County School District
Elizabethtown Area School District
Hempfield School District
Lancaster County Career & Tech Center
Lancaster-Lebanon I.U. #13
Manheim Central School District
Pequea Valley School District
School District of Lancaster
Warwick School District

Lebanon

Annville-Cleona School District
Cornwall-Lebanon School District
Eastern Lebanon County School District
Lebanon School District

Lehigh

Allentown School District
Carbon-Lehigh I.U. #21 **
East Penn School District
Southern Lehigh School District

Luzerne

Greater Nanticoke Area School District
Luzerne I.U. #18
West Side Career & Technology Center
Wyoming Area School District
Wyoming Valley West School District

Lycoming

BLaST I.U. #17
Montoursville Area School District
Williamsport Area School District

McKean

Smethport Area School District

Mifflin

Tuscarora I.U. #11

Monroe

Colonial I.U. #20
East Stroudsburg Area School District

Montgomery

Cheltenham Township School District
Colonial School District
Hatboro Horsham School District
Lower Moreland Township School District **
Methacton School District
Montgomery County I.U. #23
North Penn School District
Pottsgrove School District
Souderton Area School District

** Denotes clients for whom we are solicitor

SOUTHEAST REGION

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SWEET | STEVENS | KATZ | WILLIAMS

Montgomery (con't)

Springfield Township School District
Upper Dublin School District
Upper Merion Area School District

Northampton

Bangor Area School District
Nazareth Area School District

Northumberland

Mount Carmel Area School District
Shamokin Area School District
Warrior Run School District

Perry

West Perry School District

Philadelphia

School District of Philadelphia

Pike

Delaware Valley School District

Potter

Coudersport Area School District
Galeton Area School District
Seneca Highlands Intermediate Unit #9

Schuylkill

Minersville Area School District
North Schuylkill School District
Pine Grove Area School District
Schuylkill County I.U. #29 **
Schuylkill Haven Area School District
Schuylkill Technology Center **
Shenandoah Valley School District
Tamaqua Area School District
Tri-Valley School District
Williams Valley School District

Snyder

Central Susquehanna I.U. No. 16

Sullivan

Sullivan County School District **

Susquehanna

Blue Ridge School District **
Elk Lake School District **
Forest City Regional School District
Montrose Area School District **
Mountain View School District
Susquehanna County CTC

Tioga

Northern Tioga School District
Southern Tioga School District
Wellsboro School District

Union

Mifflinburg Area School District

Washington

Intermediate Unit #1

Westmoreland

Westmoreland I.U. #17

Wyoming

Lackawanna Trail School District **
Tunkhannock Area School District **

York

Hanover Public School District
Northeastern School District **
Red Lion Area School District
Southern York County School District
West York Area School District

Municipal Clients

Burlington Borough **
Canton Borough **
Coplay-Whitehall Sewer Authority
Heidelberg Township

Miscellaneous and Others

Elwyn
Harrisburg Area Community College
Martha Lloyd Community Services **
Pennsylvania School for the Deaf
Tioga Bradford Housing Authority
Valley Day School **

Insurance Companies

We have been assigned as approved counsel or on request by the following insurance companies in the areas of errors and omissions and general liability coverage (school leaders' liability insurance).

PSBA Insurance Trust
CM Regent
National Union
AIG
Liberty Mutual Group
Ohio Casualty
Wright Insurance
Philadelphia Insurance Companies
Ace Insurance
Western World Insurance
Allied World Insurance
Utica Insurance Company

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Budget/Fee Proposal

Our extensive experience in serving many different school districts/entities and municipalities affords us the ability to draw on other client experiences to provide prompt and definitive solutions while handling every issue with the utmost confidence and sensitivity.

We do not require a fixed retainer fee in advance, and our billings are based upon services actually performed during the preceding billing period. Using this approach, our clients have used our services on an "as needed" basis and are only charged if services have been requested and provided.

Hourly Rate for Services

The standard basis for fees for services rendered is based upon calculation of hourly chargeable time applied to an hourly rate. Our current hourly rates for chargeable time vary, depending upon the complexity of the matter involved. For routine matters, our standard hourly rate for chargeable time is \$210/hour for attorneys and \$160/hour for legal assistants. Our fees for non-routine matters are \$230/hour for attorneys and \$160/hour for legal assistants.

Non Routine Services

Non-routine situations involving the higher hourly rate are those matters in which a case or controversy has arisen or may arise by virtue of threatened litigation, circumstances in which the client is contacted by an attorney representing a specific client, actual litigation, hearing requests, citizen complaints, defense of complaints filed in court or before agencies, or hearings before the school board itself. These situations also include negotiation with parties concerning litigation settlements, special education matters, student residency disputes, student and employee discipline matters, grievance processing where a specific grievance has been filed, grievance arbitrations, collective bargaining where we represent the district as its negotiator, construction matters, tax matters and specific Right-To-Know matters and appeals.

Routine Services

All advice, phone calls, opinions, document review, general Right-To-Know questions and responses, analysis or development of board policy or procedure, contract reviews, research, and other activities not covered by the preceding are considered routine.

Time Billed

During the course of representation we record chargeable time devoted to a client's matter in fractions of hours in periods of two tenths of an hour. Any time beyond two tenths of an hour will be billed at the next full tenth of an hour. Absence from our office on behalf of our clients is also recorded on the same basis. We do minimize travel time whenever possible.

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We reserve the right to decline to perform or to continue to perform requested services at any time. At the end of any month that more than minimal services are rendered, we

routinely provide a computerized description of the nature, date and amount of time attributable to each entry, along with our invoice for the period.

Out of Pocket Expenses and Other Costs

Our out-of-pocket expenses for computerized research, e-discovery services, stenographic services (court reporters), in-house composition of briefs and records, i.e., printing, collating and binding, costs for hearing officers or arbitrators, witness fees, photocopying/printing (\$.20 per page), and court costs, where required, are charged to our clients at cost. At times, when such charges are substantial, we may ask you to pay them directly.

As solicitor, we charge one-half of bond counsel's fee to render a requested opinion.

We charge a flat fee of \$300.00 for preparation of audit opinion letters when we are requested to do so by you, your accountants, or state auditors. This covers the cost of our internal review where such a letter is provided. We also quote a separate fee where we are asked to provide an opinion involving a financing or to provide in-service training.

What We Do NOT Charge for

We do not charge for telephone expenses or electronic transmissions. We do not charge for our travel costs, such as fuel, meals, lodging, tolls, or mileage, except in the case of necessary airfares. We also do not charge with respect to the extensive publications to which we subscribe, or for our attendance at the numerous seminars and educational programs which we regularly attend. Unless there is a particular benefit to the client or unless previously approved or requested by our client, we do not charge for "duplicate" time; that is, time spent by more than one attorney when conferring among ourselves, or reviewing each other's work, or where two or more of our attorneys attend a meeting, hearing or trial.

We maintain comprehensive opinion and research files on most commonly asked questions. We are, therefore, frequently able to provide answers quickly without extensive legal research.

On occasion, when developing a generally applicable opinion and guidance on a novel topic or change in the law, we will, with permission of individual clients, pool time across multiple clients so costs for such generally applicable opinions and guidance are minimized for each individual client.

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What We Do NOT Charge for (con't)

File maintenance - We do not charge for opening, closing, retention or destruction of files. Our policy is to destroy physical and electronic files six years after final billing. Since each client should possess all of the official records contained in our files, return of files should not be necessary. However, you may request a file be returned. The return of physical files may incur shipping charges. If you wish to have your physical files returned, please contact Brett Porembski at bporembski@sweetstevens.com.

What Might Affect the Above

Please note the rates charged where an insurance company is involved may vary from the preceding, based upon our agreement with the company involved. Where insurance coverage is involved, we may ask that you pay our monthly bills, and we then will submit claims for reimbursement on your behalf to the insurance company. In all cases in which insurance coverage may be available, the ultimate responsibility for payment of our charges will remain with you.

By virtue of our experience in the area of school and municipal law, we constantly seek to make productive use of our time and to thereby provide our services efficiently. Frequently, difficult questions encountered by our clients are questions with which we have previously dealt. It is a source of professional pride that we are able to minimize chargeable time spent on many questions based on SSKW's collective experience and singular focus on advising public entities.

We welcome the opportunity to help you, we are confident you will be more than satisfied with the value of our services, and we look forward to the possibility of working with you in the year ahead.

SWEET, STEVENS, KATZ & WILLIAMS LLP

Federal E.I. No. 23-2807059

SOUTHEAST REGION

331 East Butler Avenue, New Britain, PA 18901
PHONE 215 345 9111 | **FAX** 215 348 1147

CENTRAL REGION

P.O. Box 956, Hershey, PA 17033
PHONE 717 641 9025 | **FAX** 717 641 9026

NORTHEAST REGION

250 Kennedy Boulevard, Suite 1, Pittston, PA 18640
PHONE 570 654 2210 | **FAX** 570 655 1875

NORTHERN TIER REGION

30 Taylor Street, Suite B, Troy, PA 16947
PHONE 570 512 1440 | **FAX** 570 512 1442

Perciballi & Williams LLC

429 Market Street
Williamsport, Pa. 17701

570-323-8506

Fax 570-323-1958

Email: office@perciballiandwilliams.com

Scott T. Williams

Zachary M. DuGan
Associate

Henry P. Perciballi
1927-2020

January 28, 2026

East Lycoming School District
Attn: Dr. Mark Stamm, Superintendent
349 Cemetery Street
Hughesville, PA 17737

Re: Request for Proposals/Solicitor Services

Dear Dr. Stamm:

Thank you for your letter of January 16, 2026 regarding the above matter.

The name of this office is Perciballi & Williams, LLC. We have two (2) attorneys here that practice municipal law. I attended the University of Pittsburgh School of Law and was admitted to the Pennsylvania Bar in 1980. I do not have a resume any longer. I have enclosed a copy of the resume of my Associate, Zachary DuGan. Our general areas of legal practice include municipal law, real estate, corporate/business law, estates, PLCB work, etc. We do not do any domestic relations, criminal law, personal injury, or general litigation. We do litigation associated with our practice areas.

We do not currently represent any Pennsylvania School District. Most of our municipal clients are Boroughs, Townships, Authorities, Zoning Hearing Boards, etc. We currently represent 18 Boroughs, Townships, and Authorities. We also represent a number of Zoning Hearing Boards. In the East Lycoming area, we represent the Borough of Hughesville, Hughesville Water Authority, Wolf Township, Clinton Township, Muncy Township, and the Montgomery Water Authority. I have served as a Board member on the Loyalsock Township School Board. Your IFP asked for a description of what makes this firm uniquely qualified to do the work. Since Zach and I have so many municipal clients, we often have conflicts with meeting nights. When those conflicts occur, we each go to one of the meetings. When we do not have a

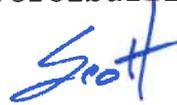
conflict, we usually both go to the meeting even though we only charge for one (1) attorney being there. In doing so, we both keep current on the business of the client so that we are both available to respond to any inquiries. This process also allows us to be available and responsive in a timely manner which is often the problem with other Solicitors.

We do not have a retainer fee. We work straight hourly and our hourly rate is \$140.00 per hour for attorney only. We do not have paralegals or other professionals which are billed separately. We do ask for reimbursement of any expenses occurred on behalf of the client other than ordinary expenses, such as ordinary postage and photocopies. We do not usually have significant out-of-pocket expenses for municipal clients but they can occur.

If you have any other questions, please let me know.

Very truly yours,

Perciballi & Williams LLC



Scott T. Williams

STW/scr
Enclosure

ZACHARY M. DUGAN

106 Woodside Road • Lemoyne, PA 17043 • (570) 269-6771 • zachdugan12@gmail.com

PROFESSIONAL EXPERIENCE

Pillar + Aught LLC

January 2022 – June 2022

Harrisburg, Pennsylvania

- **Associate Attorney.** Conducted complex legal research in connection with the representation of clients operating across a vast range of fields, including: general securities law and regulatory compliance for community banks, credit unions, and other financial institutions; labor and employment issues for employers and employees; general corporate governance and acquisitions for privately owned businesses; and various compliance questions for municipalities.

Penwell Bowman + Curran LLC

October 2019 – May 2021

Harrisburg, Pennsylvania

- **Corporate Attorney.** Represented insurance aggregators and agencies in asset and stock acquisitions as both the buyer and seller, assisted start-up companies in entity formation, bridge financing, and other capital raising ventures, drafted and negotiated commercial loan documents for financial institutions, and provided general corporate and securities law advice, including corporate governance and insurance regulatory compliance.
- Selected to the **Super Lawyers 2021 Pennsylvania Rising Stars list**. This is an exclusive list, recognizing no more than 2.5 percent of the lawyers in Pennsylvania who are 40 years old or younger.

Stevens & Lee, PC

January 2018 – October 2019

Harrisburg, Pennsylvania

- **Corporate & Financial Institutions Associate Attorney.** Assisted financial institutions in private securities offerings, guided church extension funds through the intricacies of securities compliance in annual offerings, and represented public and private corporations in various asset purchase agreements.

Rhoads & Sinon, LLP

September 2017 – December 2017

Harrisburg, Pennsylvania

- **Associate Attorney.** Researched complex legal issues, drafted corporate formation documents, and conducted corporate due diligence.

**Licensed and in good standing to practice law in Pennsylvania as of November 2022.*

Continued . . .

EDUCATION

Widener Commonwealth University Law School
Harrisburg, Pennsylvania

May 2017

Achievements:

Class of 2017 Valedictorian

Publications:

3-D Printing & Products Liability Law: Are Individuals Printing Themselves Into Strict Products Liability?
26 WIDENER L.J. 185 (2017)

PERA & Unfair Labor Practices: The Tension of the Knowledge Requirement as Illustrated by Lancaster County v. Pennsylvania Labor Relations Board
26 WIDENER L.J. 277 (2017)

Activities:

Widener Law Journal
Editor-in-Chief, Volume 26

INTERESTS

- Spending time with my wife and our rescue dog,
- Watching the Philadelphia Eagles, and
- Learning construction for home renovations

March 3, 2026

Re: RFP for Technology Management

Members of the Board

As requested by the Board, RFPs for an interim technology director were solicited from January 16 through February 16. The district received three proposals listed below. Exact monthly costs will vary depending on daily needs in the district, but general pricing is provided.

I need to impress upon the board that daily operations without a program director is becoming a challenge. Maintenance technicians are doing their best, but they cannot fully fill the gap created by the absence of a full-time director. Looking forward, state testing begins in mid-April and will be quickly followed by Keystone Exams and AP exams. All of these are on-line. The assessment windows are short and we will not have reaction time to call in outside service if there is a problem on test days. Approving one of these temporary services will provide some support that is in critical need while the Board continues to discuss options.

Sage497: \$12,000

Intrada Technologies: \$10,000

BLAST IU17: \$5,800

RFPS are included for your review.

Respectfully,
Dr. Mark Stamm
Superintendent



Sage 497 Consulting LLC

717-497-2709

www.sage497.com

East Lycoming School District,

Sage 497 Consulting LLC is pleased to submit this Letter of Interest in response to the East Lycoming School District's Request for Proposals for Technology Transition Support Services. As the District prepares for a transition in technology leadership, ensuring operational stability, continuity, and informed decision-making is essential to protecting instructional and administrative services.

Sage497 proposes to serve as the District's Interim Technology and Transition Advisor, providing experienced, executive-level leadership focused on maintaining system reliability, identifying and managing risk, and supporting District leadership throughout the transition period. This engagement is designed to ensure that the District remains stable and well-supported while laying a sound foundation for its long-term technology needs.

Sage497 is led by Michael Sage, a former Chief Information Officer, Chief Technology Officer, Chief Information Security Officer, and Chief Operating Officer with decades of experience supporting public-sector organizations across Pennsylvania.

Sage497 plans to work collaboratively with District personnel to ensure continuity of operations, proactive identification of risks, and clear communication with leadership. During the transition period, the District will be in capable and steady hands, with decisions grounded in experience, best practices, and the long-term interests of students, educators, and the community.

Sage497 appreciates the opportunity to be considered for this engagement and looks forward to the possibility of supporting East Lycoming School District during this important transition.

Respectfully submitted,

Michael Sage

Owner & Operator

Sage 497 Consulting LLC

Sage497

East Lycoming School District Technology Transition Support Services RFQ

Proposal



Sage 497 Consulting LLC

Submitted by Michael Sage, Owner, Sage 497 Consulting
msage@sage497.com, 717-497-2709
2813 Sweet Birch Ct. Harrisburg PA, 17112
www.sage497.com

Submitted on February 16, 2026

Table of Contents:

- Executives Summary
- Qualifications, Experience, and Examples
- Examples
- Proposed Approach, Methodology, Engagement Model
- General Fee Structure
- Conclusion

Executive Summary:

East Lycoming School District is entering an important period of transition in technology leadership. During these moments, the greatest risks are not innovation delays, but operational disruption, loss of institutional knowledge, deferred decisions, and unmanaged technical or cybersecurity exposure. Maintaining stability, continuity, and informed executive oversight is essential to protecting instructional and administrative services.

Sage497 Consulting LLC proposes to support the District as an Interim Technology and Transition Advisor, providing experienced, executive-level leadership focused on operational stability, risk management, and continuity of service. This engagement is designed to ensure that the District's technology environment remains reliable and well-governed while establishing a strong foundation for future planning and long-term technology needs.

Sage497 is led by Michael Sage, a former Chief Information Officer, Chief Technology Officer, Chief Information Security Officer, and Chief Operating Officer with decades of experience supporting public-sector organizations across Pennsylvania. His background includes leading technology operations, cybersecurity programs, budgets, staffing, and organizational oversight during periods of change. This experience directly aligns with the District's need for steady leadership, clear communication with the Superintendent, coordination with existing staff, and proactive identification of risks.

The proposed engagement begins with a comprehensive assessment of the District's technology environment, including infrastructure, instructional and administrative systems, cybersecurity posture, strategy, budget, staffing, vendor relationships, and governance practices. This assessment establishes a clear baseline, identifies operational and financial risks, and ensures District leadership has full visibility into the current state of technology operations early in the transition.

Following the assessment, Sage497 will provide ongoing on-site oversight and advisory support, focused on maintaining system health, coordinating issue resolution, and ensuring continuity of operations. Rather than introducing unnecessary change, the approach emphasizes disciplined monitoring, proactive risk awareness, and thoughtful decision support. Regular updates and recommendations will be provided to the

Superintendent to support informed leadership decisions throughout the transition period.

In parallel, Sage497 will provide transition support by documenting key decisions, preserving institutional knowledge, clarifying roles and responsibilities, and ensuring that actions taken during the interim period do not create downstream challenges. While this engagement is transitional in nature, it is intentionally forward-looking, positioning the District to move confidently into its next phase of technology leadership.

Sage 497's approach is practical, collaborative, and grounded in real-world public-sector experience. The District will be supported by a single, consistent advisor with a clear focus on stability, risk reduction, and the long-term best interests of students, staff, and the community. East Lycoming School District will be in capable and steady hands throughout this transition.

Qualifications and Experience:

Sage 497 Consulting LLC brings extensive public-sector technology leadership experience uniquely suited to supporting East Lycoming School District during a period of transition. The firm is led by Michael Sage, an accomplished executive with decades of experience serving state and local government organizations across Pennsylvania in senior technology, cybersecurity, operations, and advisory roles.

Michael Sage has served in multiple executive capacities, including Chief Information Officer (CIO), Chief Technology Officer (CTO), Chief Information Security Officer (CISO/CSO), Chief Operating Officer (COO), and Deputy Executive Director. Throughout his career, he has been trusted to lead organizations through periods of change, stabilize operations, manage risk, and provide clear, practical guidance to executive leadership.

County and Local Government Experience

Most recently, Michael served as Chief Operating and Information Officer for the County Commissioners Association of Pennsylvania (CCAP), where he supported all 67 Pennsylvania counties. In this role, he provided direct advisory and consulting support to county CIOs, IT directors, county executives, and elected officials on a wide range of technology, cybersecurity, and operational matters.

His work with counties included:

- Advising technology leaders during leadership transitions and vacancies
- Providing executive-level guidance on technology operations, budgeting, and governance

- Conducting technology and cybersecurity assessments for counties of varying size and maturity
- Supporting risk management, continuity planning, and incident preparedness
- Reviewing vendor contracts, service agreements, and technology investments
- Facilitating collaboration, information sharing, and best practice development across counties

This role required a strong understanding of the operational realities facing local governments, including staffing constraints, budget pressures, compliance obligations, and the need to maintain uninterrupted services. Michael's experience working directly with county leadership mirrors the advisory and transition support needs of a school district environment.

Supporting Technology Leaders Across Roles

A consistent theme throughout Michael Sage's career has been supporting and mentoring technology leaders at all levels. He has worked alongside CIOs, IT directors, security officers, managers, and technical staff to provide clarity, structure, and continuity during periods of organizational change.

Rather than replacing local leadership or staff, his approach has focused on:

- Helping leaders understand risks, priorities, and tradeoffs
- Providing context and executive perspective during complex decisions
- Supporting continuity of operations when leadership changes occur
- Ensuring institutional knowledge is preserved and documented

This collaborative, advisory style is particularly effective in transition environments, where staff stability and confidence are critical.

Commonwealth of Pennsylvania Experience

Michael Sage spent over 15 years with the Commonwealth of Pennsylvania, primarily within the Department of Labor & Industry, before advancing to enterprise-wide leadership roles. His progression from technical roles into executive leadership provides him with a comprehensive understanding of technology environments from both operational and strategic perspectives.

At the Commonwealth level, Michael:

- Led large-scale technology operations supporting mission-critical systems

- Managed enterprise cybersecurity programs, audits, and risk management initiatives
- Oversaw multi-agency technology environments and shared services models
- Directed infrastructure, application development, operations, and budgeting
- Managed organizations with hundreds of staff and budgets exceeding \$60 million

As Chief Technology Officer for the Employment, Banking, and Revenue Delivery Center, he supported five state agencies simultaneously, overseeing infrastructure, cybersecurity, and operational services across the Commonwealth. These roles required disciplined governance, continuity planning, and executive communication skills directly applicable to supporting a school district during transition.

Relevance to East Lycoming School District

Sage 497's qualifications are rooted in real-world experience navigating complex public-sector environments, not theoretical consulting models. Michael Sage understands the importance of maintaining operational stability, protecting sensitive data, supporting staff, and ensuring leadership has clear, actionable insight during periods of change.

This combination of county-level advisory work, direct support of technology leaders, and deep Commonwealth experience positions Sage 497 to serve as a trusted interim advisor to East Lycoming School District focused on stability today and readiness for the future.

Examples:

The following examples illustrate Sage 497 Consulting LLC's experience providing executive-level advisory support, operational oversight, and transition-related guidance in complex public-sector environments. Each example reflects circumstances similar to those faced by East Lycoming School District, where continuity, risk awareness, and clear leadership communication were essential.

Example 1: Advisory Support to County CIOs and IT Directors Across Pennsylvania

While serving as Chief Operating and Information Officer for the County Commissioners Association of Pennsylvania (CCAP), Michael Sage provided direct advisory support to technology leaders across all 67 Pennsylvania counties. In this role, he worked closely with county CIOs, IT directors, and

executive leadership on a wide range of technology, cybersecurity, and operational matters.

This support frequently occurred during periods of leadership transition, staffing shortages, or heightened operational risk. Advisory services included:

- Guiding technology leaders through leadership changes and interim periods
- Supporting executive decision-making related to technology operations and governance
- Providing risk-based guidance on cybersecurity, continuity, and incident preparedness
- Assisting with vendor management, contract reviews, and service expectations
- Helping leaders prioritize limited resources while maintaining operational stability

This experience required a disciplined, practical approach grounded in the realities of local government. It closely parallels the advisory and oversight role proposed for East Lycoming School District.

Example 2: Commonwealth Technology Leadership, Reorganization, and Continuity Management

During more than 15 years with the Commonwealth of Pennsylvania, Michael Sage held progressively senior technology leadership roles, including Deputy CIO, CIO, CTO, and CISO/CSO. In these positions, he supported mission-critical technology environments serving multiple agencies and millions of residents.

As Chief Technology Officer for the Employment, Banking, and Revenue Delivery Center, he supported five state agencies simultaneously, overseeing infrastructure, cybersecurity, and operational services across the Commonwealth. These roles required maintaining uninterrupted services while navigating organizational change, evolving priorities, and complex governance structures.

Key responsibilities included:

- Maintaining system availability and operational continuity
- Managing cybersecurity risk and compliance obligations
- Coordinating across agencies, leadership teams, and technical staff
- Providing clear executive-level communication during periods of change

These experiences reinforce the importance of steady leadership, disciplined oversight, and proactive risk management during transitions, principles that directly inform Sage497's approach.

Example 3: Technology and Cybersecurity Assessments with Executive-Level Reporting

Across both county and Commonwealth environments, Michael Sage has led and supported numerous technology and cybersecurity assessments designed to inform executive leadership rather than generate purely technical documentation.

These assessments focused on:

- Evaluating infrastructure, applications, and operational practices
- Identifying cybersecurity, continuity, and staffing risks
- Reviewing budgets, contracts, and sustainability of technology investments
- Translating findings into clear, actionable recommendations for leadership

In each case, assessment results were presented in a manner that supported informed decision-making without overwhelming non-technical stakeholders. This assessment-driven, leadership-focused approach forms the foundation of Sage497's proposed engagement with East Lycoming School District.

These examples demonstrate Sage497's ability to provide calm, experienced leadership during periods of transition. Across advisory roles supporting counties, senior leadership positions within the Commonwealth, and executive-level assessments, the focus has remained consistent: protect operations, reduce risk, support staff, and ensure leadership has the insight needed to make confident decisions.

References for the representative examples described above are available upon request.

This experience directly supports East Lycoming School District's need for an interim technology advisor who understands public-sector environments and can guide the District safely through a leadership transition.

Proposed Approach, Methodology, Engagement Model:

Sage 497 Consulting LLC will provide Interim Technology and Transition Advisory services using a structured, assessment-driven, and stability-focused methodology tailored to the operational realities of a K–12 public school district. The approach is designed to protect instructional and administrative continuity, reduce operational and cybersecurity risk, and provide District leadership with clear, timely insight throughout the transition period.

This engagement intentionally balances immediate operational needs with thoughtful preparation for the District's long-term technology direction. The methodology is phased to ensure clarity, discipline, and confidence at each stage of the transition.

Guiding Approach

Sage497's approach reflects decades of executive leadership experience across county and Commonwealth environments where continuity, governance, and risk management were paramount. Rather than introducing disruption, the engagement focuses on understanding the current environment, stabilizing operations, and supporting leadership with practical, experience-based guidance.

Key principles guiding this engagement include:

- **Stability before change:** Instructional delivery and daily operations must remain reliable.
- **Assessment before action:** Leadership decisions should be informed by facts and context.
- **Risk-based prioritization:** Attention is focused where failure would have the greatest impact.
- **Collaborative leadership:** Existing staff and vendors are supported and aligned.
- **Intentional transition planning:** Interim actions should strengthen the future state.

Phase 1: Comprehensive Assessment and Transition Baseline

The engagement begins with a comprehensive assessment to establish a clear, shared understanding of the District's current technology environment. This phase is critical to reducing uncertainty early in the transition and ensuring District leadership has confidence that risks, dependencies, and priorities are fully understood.

Rather than producing a purely technical report, this assessment is designed to provide executive-level visibility into how technology supports instruction and operations today, where vulnerabilities exist, and what issues require leadership attention. This phase also establishes a baseline that informs all subsequent oversight, planning, and advisory activities.

The assessment will include review and evaluation of:

- Technology and infrastructure, including networks, servers, cloud services, endpoints, backups, disaster recovery, and resiliency
- Instructional and administrative systems such as student information systems, learning platforms, finance, HR, and communications
- Cybersecurity and risk management practices, including access controls, monitoring, and incident readiness

- Existing strategies, plans, roadmaps, and deferred initiatives
- Technology budgets, contracts, renewals, licensing, and financial sustainability
- Staffing structure, roles, coverage, reliance on vendors, and continuity risks
- Governance, decision-making processes, and vendor management practices

Outputs from this phase will include clear observations, identified risks, and immediate priorities presented in a format suitable for District leadership.

Phase 2: Ongoing Oversight and Operational Continuity

Following the assessment, the focus shifts to maintaining operational stability and continuity throughout the transition period. This phase ensures that the District's technology environment remains reliable, well-coordinated, and actively managed while leadership transitions are underway.

Sage497 will provide steady oversight rather than operational micromanagement, working alongside existing staff and vendors to ensure that routine responsibilities are being met and emerging issues are addressed proactively. This approach minimizes disruption while reinforcing accountability and confidence.

Activities during this phase include:

- Monitoring system health, availability, and performance
- Coordinating issue resolution with District staff and vendors
- Validating that routine operational and security activities are occurring as expected
- Ensuring that critical risks, renewals, or decisions are not deferred or overlooked

Phase 3: Executive Advisory and Decision Support

A central element of this engagement is direct advisory support to District leadership, particularly the Superintendent. During transitions, leaders are often required to make technology-related decisions without full context or confidence; this phase is designed to close that gap.

Sage497 will translate technical and operational information into clear, practical guidance that supports informed decision-making. Communications will be concise, timely, and focused on impact rather than technical detail.

This phase includes:

- Regular executive updates on system status, risks, and emerging concerns
- Recommendations framed around options, tradeoffs, and operational impact
- Support for prioritization and sequencing of actions
- Escalation of issues requiring leadership awareness or direction

Phase 4: Operational, Transition, and Strategic Planning Development

Once the District's environment is understood and stabilized, Sage497 will work with leadership to develop practical planning artifacts that guide both the remainder of the transition period and the District's longer-term direction. This phase provides structure and continuity without introducing unnecessary change.

The focus is on producing usable, leadership-ready plans that reflect the District's realities, resources, and priorities. These artifacts ensure that the District exits the transition period with clarity rather than uncertainty.

This phase includes development of:

- Technology Operations and Maintenance Planning
 - Clarification of ongoing support and maintenance responsibilities
 - Identification of critical operational dependencies and coverage risks
 - Validation of support models for instructional and administrative systems
 - Recommendations to strengthen day-to-day operational reliability
- Transition Support Planning
 - Documentation of current-state conditions and known risks
 - Capture of institutional knowledge related to systems, vendors, and decisions
 - Identification of near-term issues requiring leadership attention
 - Preparation of transition materials to support continuity
- Strategic Direction and Roadmap Development
 - A high-level technology strategy framework aligned with District goals

- Identification of priority initiatives based on risk, sustainability, and instructional impact
- A practical technology roadmap outlining short-, mid-, and long-term considerations
- Alignment of roadmap items with budget cycles and resource capacity

All planning outputs will be presented in a concise, executive-friendly format suitable for ongoing use by District leadership.

Phase 5: Transition Support and Knowledge Continuity

Throughout the engagement, and particularly as the transition progresses, Sage497 will focus on preserving continuity of knowledge and decision-making. This phase ensures that the District does not lose context, momentum, or clarity as leadership evolves.

Activities include:

- Maintaining documentation of decisions, risks, and planning artifacts
- Supporting staff through role clarity and consistent communication
- Ensuring leadership maintains visibility into priorities and dependencies
- Leading staff and leadership through change management and communication strategies
- Preparing the District to move forward without disruption or knowledge loss

Engagement Model and Availability

Sage497 proposes a single-resource, hybrid engagement model, led by Michael Sage, designed to provide consistent, responsive, and cost-effective interim technology leadership throughout the transition period. This model ensures continuity, accountability, and a strong working relationship with District leadership, staff, and vendors.

Sage497 estimates an average commitment of approximately 25 hours per week in support of the District. This level of effort is intentionally structured to balance on-site presence with flexible remote availability, ensuring both visibility and responsiveness without unnecessary overhead.

The engagement includes:

- Two days per week on-site, 8:00 a.m. to 4:00 p.m., in alignment with District requirements
- The remaining support hours delivered remotely through a hybrid model
- Consistent involvement by a single advisor to avoid fragmentation or loss of context

The hybrid model leverages:

- Virtual meetings and regular check-ins with District leadership and staff
- Secure collaboration and shared documentation tools
- Direct coordination with vendors and service providers as needed

This approach allows Sage497 to remain actively engaged between on-site days, respond to emerging issues, and maintain momentum on assessment, oversight, and planning activities. It also supports efficient communication, timely follow-up, and continuity of knowledge throughout the transition.

The estimated level of effort described above reflects Sage497's current understanding of the District's needs based on the information provided in the RFP. The actual number of hours required may be adjusted by mutual agreement based on the finalized scope of services, evolving priorities, and conditions identified during initial discussions with East Lycoming School District. Any adjustments will be made collaboratively to ensure appropriate coverage, transparency, and alignment with the District's objectives.

The engagement is structured on a month-to-month basis, providing the District with flexibility to adjust the scope or duration of services as needs evolve. Additional availability outside scheduled hours can be provided when necessary to address urgent issues or critical transition milestones.

This engagement model ensures East Lycoming School District receives steady, accessible, and experienced technology leadership during the transition, while maintaining a seamless support environment that protects operations and prepares the District for its next phase of leadership.

Results for the District

Through this phased approach, East Lycoming School District will benefit from:

- A clear, shared understanding of its technology environment
- Stable and well-governed operations during transition
- Reduced operational and cybersecurity risk

- Practical operational, transition, and strategic planning artifacts
- A strong foundation for future technology leadership and planning

General Fee Structure:

Sage497 proposes a fixed monthly fee structure to support the Interim Technology and Transition Advisory services described in this proposal. This structure aligns directly with the proposed approach, methodology, and hybrid engagement model, and provides East Lycoming School District with predictable and transparent costs during the transition period.

Based on the anticipated scope of services, Sage497 estimates an average level of effort equivalent to approximately 25 hours per week of executive-level advisory support. This level of effort includes required on-site leadership presence, remote advisory support, comprehensive assessment activities, operational oversight, executive communication, transition planning, and development of operational and strategic planning artifacts.

Proposed Monthly Fee

- Professional Services (Interim Technology & Transition Advisory): \$12,000 per month
- Travel and On-Site Expenses: \$400 per month (\$100 per week)
- Total Estimated Monthly Cost: \$12,400 per month

This monthly fee reflects a blended, hybrid engagement model that includes both on-site and remote support, ensuring consistent access to a single, experienced advisor throughout the transition period.

The estimated level of effort and associated monthly fee are based on Sage497's current understanding of the District's needs as described in the RFP. The scope of services and level of effort may be refined by mutual agreement following initial discussions with District leadership or as transition conditions evolve. Any adjustments will be discussed in advance to ensure transparency, alignment with District priorities, and continued value.

Conclusion:

East Lycoming School District is navigating a critical period of transition in its technology leadership. During this time, continuity of operations, proactive risk management, and clear executive guidance are essential to protecting instructional and administrative services.

Sage497 offers experienced, steady interim technology leadership focused on stability, collaboration, and informed decision-making. Through a comprehensive assessment, disciplined oversight, and practical transition and planning support, Sage 497 will help



ensure the District remains well-supported while laying a strong foundation for its future technology needs.

With deep experience across county and Commonwealth environments, a proven record of supporting public-sector leaders during periods of change, and a pragmatic, risk-aware approach, Sage497 is prepared to serve as a trusted partner to the District. East Lycoming School District will be in capable and reliable hands throughout this transition.

Sage 497 appreciates the opportunity to submit this proposal and looks forward to the possibility of supporting East Lycoming School District during this important period.



WE HAVE PREPARED A QUOTE FOR YOU

Technology Transition Support Services

Quote # 004900

Version 1

PREPARED FOR:

East Lycoming SD

Dr. Mark Stamm

hburke@elsd.org



Introduction

INTRODUCTION

Intrada Technologies is exceptionally positioned to support the district during its technology leadership transition. With extensive experience providing interim technology leadership, infrastructure oversight, and operational continuity for organizations across Central Pennsylvania, we understand the unique challenges school districts face when navigating staffing gaps in critical IT roles.

We specialize in delivering stability, actionable insights, and hands-on support that ensures systems remain reliable while leadership transitions occur. Our service model emphasizes risk reduction, transparent communication, and close collaboration with existing technology staff to maintain uninterrupted technology operations.

By providing an on-site, consistent, senior-level technology professional, we offer the district both immediate operational support and strategic guidance. Our team has a documented track record of successful engagements with businesses, state-funded facilities, and non-profit organizations undergoing similar transitions, and we pride ourselves on clear communication, rapid issue resolution, and informed recommendations that help leadership make confident decisions.

We believe our experience, availability, and commitment to stability make us an ideal partner for the district during this important period.

OUR HISTORY

Since 2000, Intrada has grown far beyond a network support and web design company. While we excel in managing corporate networks and crafting modern, user-friendly websites tailored to organizational needs, our expertise extends across a wide range of technology services. We are proud to serve as a full-service technology partner, offering organizations comprehensive support and strategic guidance to help them thrive.

For prospects like the *East Lycoming School District*, we would step in to bridge gaps and provide complete technology management solutions on identified network resources. Services available include help desk support, server and network management, automation, power apps, plus ongoing website development and maintenance. We don't just focus on day-to-day operations; our strategic offerings, such as vCIO (Virtual Chief Information Officer) services, help drive technology initiatives forward. From planning and budgeting to policy creation, we work to align technology seamlessly with long-term goals.

With over two decades of experience, Intrada empowers businesses and non-profits with innovative tools, reliable support, and forward-thinking strategies. Collaboration and innovation are at the heart of everything we do, and we are dedicated to exceeding expectations at every turn. At Intrada, we don't just manage technology—we help organizations unlock its full potential.

Scope of Services

1. Maintain Operational Stability

- Ensure all technology systems - including network infrastructure, instructional technology platforms, cybersecurity controls, and building-level systems - remain fully functional and monitored by District staff and systems.
- Oversee daily operations to minimize disruptions and maintain continuity during the leadership transition.

2. Identify Risks and Potential Issues

- Conduct weekly reviews of technology systems to uncover vulnerabilities, performance concerns, and operations bottlenecks.
- Document findings and communicate risk levels, potential impact, and recommended mitigation steps.

3. Provide Strategic Recommendations to District Leadership

- Offer expert consultation to the superintendent and administrative leadership regarding: Infrastructure planning, Vendor management, and Budget alignment and cost optimization
- Prepare clear, actionable recommendations based on data, system evaluations, and best practices.

4. Support the Transition to the Newly Hired Technology Director

- Build transition documentation outlining current system states, ongoing projects, vendor relationships, and departmental procedures.
- Provide onboarding support to the incoming director, helping ensure a smooth and informed handoff.

5. Monitor System Health and Operational Risks

- Utilize established monitoring via the district's existing tools to track uptime, incident trends, security event logs, and performance metrics.
- Escalate concerns and propose corrective actions promptly.

6. Coordinate and Resolve Technology Issues with Existing Support Staff

- Work collaboratively with district technology personnel to:
 - Prioritize and resolve tickets
 - Troubleshoot issues
 - Improve processes
 - Support district-wide technology initiatives
- Serve as the point of escalation for complex or unresolved issues.

7. Provide Regular Updates to the Superintendent

- Deliver structured weekly or biweekly reports summarizing:
 - System health and risk and mitigation plans
 - Key accomplishments
 - Recommendations requiring leadership decisions
- Hold standing check-in meetings as requested by district leadership.

Qualifications, References and Fee Schedule

Documented, successful experience providing Technology Support services

Intrada Technologies has extensive experience providing comprehensive technology support, infrastructure management, and strategic IT guidance to organizations with similar operational complexity, including municipalities, nonprofits, and multi-site organizations.

In addition, the primary consultant who will be assigned to this engagement has direct experience working within a K–12 school district. His background includes:

- Hands-on support of district technology systems
- Coordination with curriculum and administrative teams
- Managing instructional technology tools
- Participating in district-wide infrastructure planning
- Working within the unique compliance, safety, and operational requirements of K–12 environments

His resume is included with this proposal to demonstrate the depth of his experience and qualifications.

Together, our organizational expertise and his direct district-level insight ensure that we fully understand the operational demands, communication structures, and instructional priorities that guide technology decisions in a school environment.

Availability to meet the needs of the district

We can fully meet the district’s availability requirements as outlined in the RFP. Our designated consultant will:

- Be on-site two days per week, consistently staffed by the same individual
- Be available for superintendent meetings, leadership discussions, and urgent issues
- Offer after-hours and out-of-scope services as requested under the rate structure provided in our fee schedule

Recommendations from current similar clients

Pennsylvania Chamber of Business and Industry

Primary Contact: Jewell Lester, Vice President; jlester@pachamber.org

Services provided: Virtual Chief Information Officer, help-desk support, cyber security, cloud, phone, website and software development, and technology services.

South Central Workforce Investment Board

Primary Contact: Katie Lentz, Chief Operating Officer; klentz@scpaworks.org

Services provided: Virtual Chief Information Officer, help-desk support, cyber security, cloud, phone, website development, and technology services.

Fee proposal and fee structure:

- Two days per week on-site presence by the same individual to provide Scope of Services
- \$150 / hour for out-of-scope services
- \$150 / hour for after-hours support
- Mileage - included
- \$10,000 per month for the Scope of Service

Contract for Services

1. **CONTRACT:** This CONTRACT FOR SERVICES (the “CONTRACT”) is made by and between customer (herein referred to as “CLIENT”) and **Intrada Technologies, Inc.** (hereinafter known as “INTRADA”). CLIENT and INTRADA shall collectively be known herein as the “Parties.”
2. INTRADA shall provide the items and services as defined and set forth in this quote executed by the CLIENT. By signing, “CLIENT” hereby agrees to be bound by and abide with the terms, conditions and confidentiality presented in this quote. This quote is effective upon the execution by INTRADA and CLIENT by reference (the “Signature Date”), and shall remain until items are delivered and final payment is received.
3. NOTE: Items and Services not specified or specifically listed herein are, by their absence, specifically excluded. Any additional Items and/or Services may be added by signed Change Order
4. **START DATE / SERVICE PERIOD:** The Start Date is by reference (the “Signature Date”) noted on the quote signature page. The Service Period and billing begin on the Start Date and end when final payment is received.
5. Monthly CONTRACTS will automatically renew for consecutive months unless terminated.
6. **TERMS:** Invoices are payable within thirty (30) days of invoice date. Invoices paid within ten (10) days are eligible for a 2% discount (not available on credit card payments). A finance charge of 1.5% per month is assessed on invoices not paid within thirty (30) days. Failure to pay invoices within thirty (30) days also may result in suspension of services until payment is received. Fees are exclusive of any taxes. The “CLIENT” shall assume responsibility for all legal fees necessitated by default in payment.
7. **TERMINATION:** Monthly CONTRACTS shall remain effective as long as both parties have a continuing business relationship requiring a financial transaction. CONTRACTS may be terminated upon thirty (30) days written notice by either party. Services automatically terminate thirty (30) days after final payment. Except as otherwise limited, all confidentiality, non-disclosure, and non-solicitation provisions of this CONTRACT shall survive termination.
8. **WARRANTY:** INTRADA provides all services on an AS IS BASIS. In providing its services, INTRADA make no representations or warranties except what is expressly stated in the CONTRACT. INTRADA honors all manufacture warranties. All implied warranties are expressly disclaimed, including but not limited to the warranty of merchantability and warranty of fitness or suitability for a specific purpose.
9. **CONFIDENTIALITY:**
 - a. The Parties acknowledge that they may acquire access to each other’s information and materials that may be confidential or proprietary or may contain valuable trade secrets, and that some information may already have been disclosed prior to the date of this CONTRACT. Confidential Information means information about business opportunities, operations, technical know-how, clientele, or any other information that relates to the business of either Party. All documents exchanged between the Parties that are not generally known or available to the public will be considered Confidential Information, whether or not marked with any confidential or proprietary notice or legend when the disclosure takes place.
 - b. Each Party agrees to reveal Confidential information of the other Party only to those employees of theirs who need to know the Confidential Information, and who are informed of the confidential nature of the Confidential Information before receiving the same.
10. **EXCEPTIONS:** Information will not be considered to be Confidential Information if it is already, or otherwise becomes, publicly known by third parties as a result of no act or omission of the receiving Party. Is lawfully received, after disclosure hereunder, from a third party having the right to disseminate the information without restriction of disclosure. Can be shown to have been independently developed prior to the execution of this CONTRACT. Or is required to be disclosed by administrative or judicial order, provided that the receiving/disclosing Party gives timely notice to the other Party and an opportunity to the other Party to seek a protective order or other appropriate remedy.
11. **NON-DISCLOSURE:** Both during the term of this CONTRACT and in perpetuity after termination or completion of this CONTRACT, both Parties agree to use all efforts to protect Confidential Information of the other Party from unauthorized use or disclosure, and to use at least the same degree of care with regard thereto as the Party uses to protect its own Confidential Information of a like nature. And to use and reproduce the Confidential Information only as permitted under this CONTRACT. Parties will not disclose or otherwise permit access to Confidential Information of the other Party to any third party without the sending Party’s prior written consent.
12. **NON-SOLICITATION:** Both during the term of this CONTRACT and for six (6) months after termination of this CONTRACT, either directly or indirectly, and either for its own benefit or for the benefit of any other person, firm, corporation or organization, neither Party shall solicit or encourage any person to leave the employment or service of the other Party or hire, on behalf of the Party or any

other person or entity. Both Parties further agree that they will not intentionally interfere with the relationship of the other Party and any of its employees or any third party, or endeavor to entice away from the other Party, any person who, during the term of this CONTRACT.

13. **ACCEPTABLE USE POLICY:** The CLIENT shall use INTRADA services only in accordance with applicable law and for lawful purposes. The CLIENT shall not use or permit others to use INTRADA services in a manner which would violate any law or infringe any copyrights, trademarks, or patents. Once notified of any violation of this Acceptable Use Policy, the CLIENT agrees to cooperate with INTRADA and work promptly to cease the noted activities. INTRADA reserves the right to interrupt or disconnect services for non-compliance with this AUP or in compliance with instructions from government authorities.
14. **LIMITATION OF LIABILITY:** Both parties agree that it is impossible to guarantee the trouble-free performance of computer hardware, software, networks, environments, security and systems, the security, privacy, specific functionality or performance of any free-standing or integrated system or resource; the reliability, applicability or performance of any technology or technology-related asset; the applicability, outcome or performance of any training or the behavior of any human resources; whether procured, provided, installed, managed, supported, administered, trained and/or supervised by INTRADA, or in any way associated with INTRADA services or otherwise.
15. INTRADA shall not be liable for any damages resulting from the use or inability to use its services, reliance on its services or on information obtained therefrom, interruptions of service, breach, compromise, compliancy failure, unauthorized access to any records, files, data, systems, or other assets, valuables and resources; errors, defects, viruses, malware, delays in operation or transmissions or any other failure of performance or business function. Further, INTRADA shall not be liable for any direct, indirect, or consequential damages arising out of or resulting from (i) the loss of any of CLIENT's data or third party data, breach of security or loss of privacy of data on CLIENT's systems or third party systems that may occur on systems installed, serviced, and/or managed by INTRADA; (ii) the malfunction, performance or compromise of any system, network or other resource related to or associated with in any capacity or by any theory with INTRADA services, and any CLIENT or third party damages, claims, losses or expenses resulting therefrom; and/or (iii) any personal injury (whether of a physical or psychological nature) or death of any person, whether associated with CLIENT or otherwise, that may in any capacity or by any theory be associated with services provided by INTRADA, and any CLIENT or third party damages, claims, losses or expenses resulting therefrom.
16. To the extent not prohibited by applicable law, INTRADA's maximum aggregate and cumulative liability under this CONTRACT is limited to the amount in fact paid by CLIENT hereunder for the two (2) months immediately preceding the date that is the basis of the first claim. In no event shall INTRADA be liable for any indirect, incidental, consequential, special, delay or punitive damages whatsoever (including but not limited to damages for loss of business profits or revenue, business interruption, loss of information, or other pecuniary loss) in connection with or arising out of this CONTRACT.
17. **INDEMNIFICATION AND HOLD HARMLESS:** Client shall defend INTRADA, from and against any Claim asserted by a third party against INTRADA, and shall indemnify and hold harmless INTRADA from and against any damages, costs, and expenses of such third party awarded against INTRADA by a final court judgment or an agreement settling such Claims in accordance with this Section. As used in this Section, the term "Claim" means any action, litigation, or claim by a third party alleging or based on: (i) any personal injury or property damage caused by CLIENT's negligence or willful misconduct in connection with this CONTRACT; (ii) Client's misuse of any services or products provided by INTRADA; (iii) inaccurate or incomplete data or information provided by or on behalf of CLIENT; (iv) Client's use of a third party service or software; (v) CLIENT's failure to comply with any law or regulation; (vi) CLIENT's failure to comply with the terms of any third party service or software agreement; or (vii) any claim of libel, violation of privacy rights, data breach, unfair competition or infringement of patents, trademarks, copyrights or other intellectual property, caused by CLIENT.
18. **INJUNCTIVE RELIEF:** Any breach of this CONTRACT may cause immediate and irreparable injury to the non-breaching Party. In the event of such breach, the non-breaching Party will be entitled to injunctive relief by the Courts, as well as any and all other remedies available at law or in equity, including but not limited to the recovery of its attorney's fees incurred in connection with enforcing the provisions of this CONTRACT.
19. **GOVERNING LAW AND FORUM:** This CONTRACT shall be governed and construed in accordance with the laws of the Commonwealth of Pennsylvania. Any litigation arising out of this CONTRACT may only be brought in the Court of Common Pleas of Lycoming County or in the United States District Court for the Middle District of Pennsylvania. In the event any legal action is initiated by either party related or arising out of this CONTRACT, INTRADA shall be entitled to collect it's reasonable attorneys' fees if it is the substantially prevailing party.
20. **RETURN OF PROPERTY:** Upon request, each Party will return to the other Party, or destroy at the other Party's discretion, all property in its possession, or under its care and control, exchanged under this CONTRACT, including all copies of the other Party's Confidential Information. The returning/destroying Party shall certify to the other Party that all Confidential Information, and all reproductions, extracts, summaries, notes and memoranda containing any Confidential Information, in their possession or under its care and control,

have been returned to the other Party and/or destroyed.

21. In certain circumstances, INTRADA may supply CLIENT equipment or cloud premises equipment that may consist of third-party hardware and software not manufactured by INTRADA. INTRADA shall have the right to remove all equipment that it has supplied. CLIENT agrees to allow INTRADA personnel reasonable access to the CLIENT's premises and/or building for the purpose of managing equipment.
22. **ENTIRE CONTRACT:** Nothing in this CONTRACT shall be construed to constitute an agency, partnership or joint venture between the Parties. This CONTRACT is a fully integrated CONTRACT and contains the entire understanding between the Parties. This CONTRACT may not be modified in any manner, except by a written amendment duly executed by an authorized representative of each of the Parties hereto.
23. **NOTIFICATION**

Notice to CLIENT: Any notice required under this CONTRACT or Controlling Law to be sent to CLIENT shall be made in writing to:

Notice to INTRADA: Any notice required under this Agreement or Controlling Law to be sent to INTRADA shall be made in writing to:

MAIL: *Intrada Technologies*

31 Ashler Manor Drive
Muncy, PA 17756
Attention: Partners

EMAIL partners@inradatech.com

IN WITNESS HEREOF and acknowledging acceptance and agreement of the foregoing, the Parties affix their signatures hereto.

Technology Transition Support Services

Quote Information:

Quote #: 004900

Version: 1

Delivery Date: 02/06/2026

Expiration Date: 02/27/2026

Prepared for:

East Lycoming SD

349 Cemetery St
Hugesville, PA 17737

Dr. Mark Stamm

(570) 584-2870

hburke@elsd.org

Prepared by:



Intrada Technologies

Allison Reichenbach

570-321-7370

areichenbach@intradatech.com

Taxes, shipping, handling and other fees may apply. We reserve the right to cancel orders arising from pricing or other errors.

Intrada Technologies

By *Allison Reichenbach*
Name: Allison Reichenbach
Title: Account Executive
Date: 02/06/2026

East Lycoming SD

By _____
Name: Dr. Mark Stamm
Date: _____

Noah Adams

Summary of Qualifications:

Over the 19 years of my professional career, I have developed a breadth of knowledge that encompasses all aspects of technology support. From private industry to K-12 schools, I have applied myself to a multitude of new situations and technologies.

In addition, I have experience not only as a technical manager, but also as a project manager on several large network buildouts and renovation projects.

Specific Technical Knowledge Areas:

- Wired and wireless networking, including Layer 3 switch and router configuration, VLANs, and firewalls. Brands including Ruckus, Ubiquiti, Cisco, HP, Palo Alto, Sonicwall, and Meraki
- Enterprise server hardware such as SAN and NAS devices, blade servers, and fiber interconnects.
- Virtualized server technologies including Microsoft Hyper-V and VMWare.
- MDM Solutions including JAMF, Securly, Lightspeed Systems, and Google Workspace MDM
- Extensive experience with common K-12 end-user hardware, including Apple MacBooks and iPads, Google Chromebooks, Windows desktops and laptops, Epson Brightlink interactive projectors, and Promethean SmartBoards.
- Data backup and retention systems from Acronis, Veeam, Backup Exec, Synology, and Data443
- IP-based security cameras and door controllers from Axis Communications and Ubiquiti
- Cloud-based products including Microsoft Office 365 and Google GSuite

Work History

Intrada Technologies, Muncy PA – Senior Network Specialist (September 2023 – Present)

- Brought on as Tier 3 support for server and networking issues
- Supporting a wide range of businesses including large healthcare facilities, government agencies, and small local business, both on-site and remote.
- Completed several large migration projects, including server replacements and on-premise to Office 365 and Google cloud migrations, while also managing a support ticket queue.
- Maintaining accurate documentation and timekeeping while working on multiple issues throughout the workday
- Advising Tier 1 and 2 technicians on possible resolutions to complex problems and assisting as needed.

- Strong emphasis on working independently through large-scale projects and keeping within budget and time constraints, while minimizing interruption to the customer.
- Assigned to the senior team within my first year of employment, giving direction to policies and procedures within the company

Millville Area School District, Millville PA – Assistant Technology Coordinator (August 2015 – September 2023)

- Hired as an assistant to the Technology Director. Primary responsibilities included network and server support as well as end-user support for the Elementary School.
- Supported Teachers and Students directly on device hardware and software issues
- Implemented data backup solutions to ensure protection from cyber attacks and hardware failure.
- Built a Microsoft Hyper-V platform to virtualize many services and reduce the number of aging servers in the environment
- Implemented Jamf MDM to properly manage Apple Devices
- Oversaw the complete replacement of all structured network cabling in the district, funded by e-Rate.
 - This project also included replacing all network switches and building out several new network closets to my specifications
- Replaced and expanded an aging security camera system:
 - System encompassed 175 cameras and video doorbells in the district's 2 buildings, with recording spread across 3 network servers.
 - Installed camera monitoring stations in main offices, SRO room, and technology rooms to serve as "command centers" in the event of a threat.
- Replaced and expanded existing network door controllers:
 - Door system went from approximately 12 doors total to 45, with proximity access at each door.
- Migrated all users email from an on-premise Exchange server to Office 365
- Worked through several device refresh cycles for both Students and Faculty/Staff, from defining specifications to acquiring quotes to configuring and deployment
- Transitioned student devices at the High School level from Macbooks to Chromebooks
- Set up a hybrid configuration with Google Gsuite to allow users to log in to both systems independently. This configuration involves communication between on-premise Active Directory, Office 365, and Google.
- Directly responsible for purchasing recommendations, acquiring quotes, and entering POs as needed.
- Stepped in as the Interim Technology Director for over a year, assuming all responsibilities of the role, including admin-level meetings, budget management, and monthly board reports.

Wise Foods Inc, Berwick, PA (November 2006 – August 2015)

- Hired as a level 1 PC/Helpdesk Technician, responsible for all desktop and laptop troubleshooting, repair, imaging, and deployments.
- Promoted to Sr Technical Support Specialist, in charge of tier 2 helpdesk issues as well as specialized software support and QA hardware/software system
 - Deployed Microsoft SharePoint as a document management solution to the entire organization
 - Migrated email system from Lotus Notes to Microsoft Exchange
 - Headed project to install IP security cameras around the manufacturing facility with a total of 24 cameras.
- Promoted to Network Services Supervisor, responsible for all servers and networking infrastructure.
 - Responsible for the selection and purchasing of servers for all projects.
 - In charge of network server backups and recovery.
 - Maintained a network of 5 remote offices with VPN connectivity.
 - Maintained a corporate network utilizing fiber links to multiple buildings
 - Built, managed, and maintained both VMWare and Microsoft Hyper-V virtualization clusters with SAN storage.
 - Managed project for complete buildout of network for new Atlanta, GA headquarters.
 - Was in the process of building out a 2nd manufacturing facility in Fort Worth, TX when I left the company.

PROPOSAL

Technology Transition Support

Presented to:



EAST LYCOMING
SCHOOL DISTRICT

Proposal by:

BLaST Intermediate Unit 17



Jan 9th 2025

Dr. Stamm
East Lycoming School District
349 Cemetery St,
Hughesville, PA 17737

Dear Dr. Stamm,

This proposal outlines a Senior On-Site Technology Support model designed to help East Lycoming maintain reliable technology operations while the District transitions to its next Technology Director. The intent is not to introduce major system changes, but to keep systems running, surface risks, provide informed recommendations, and ensure District leadership has clear visibility into what is working and what needs attention.

BLaST will assign a senior technology professional as the District's primary on-site resource, backed by BLaST's support. This approach allows the District to continue day-to-day operations with confidence while maintaining flexibility for future leadership decisions.

We look forward to working with you during this transition and appreciate the trust you have placed in BLaST IU17.

Sincerely,

Timothy Confer
Director Of Technology
BLaST Intermediate Unit 17

Purpose

BLaST Intermediate Unit 17 proposes to provide **Senior On-Site Technology Support** to East Lycoming School District to ensure continuity, stability, and informed decision-making during the District's Technology Director transition.

This engagement is designed to:

- Maintain operational stability
- Identify risks and emerging issues
- Provide informed recommendations to District leadership
- Support the transition to a newly hired Technology Director

Service Model

On-Site Leadership and Support

BLaST will assign Kyle Roberts as the District's primary on-site technology lead.

Kyle will be on site two (2) days per week and will:

- Monitor system health and operational risks
- Coordinate and resolve technology issues
- Provide regular updates and recommendations to Dr. Stamm
- Assist District leadership in understanding upcoming needs, risks, and opportunities

Kyle will work under the direction of the Superintendent. Any major changes, purchasing, or vendor engagements will be coordinated with and approved by Dr. Stamm.

Additional on-site days or after-hours support may be provided when needed, including for outages, urgent issues, or approved project work.

In addition to Kyle's on-site presence, East Lycoming will have access to BLaST's full Technology Division, including specialists in:

- Networking and infrastructure
- Systems and servers
- Firewalls and security
- Phone and cameras

With approval from District leadership, Kyle may bring in these specialists to address issues or complete work at their standard billable rates.

Meet Your On-Site Lead

Kyle Roberts

Kyle Roberts joined BLaST IU17 in 2025, bringing over five years of hands-on IT experience supporting end users, systems, and infrastructure in a high-demand production environment. Prior to joining BLaST, Kyle served as the lead IT Support Specialist for a large multi-location automotive dealership group, where he was responsible for day-to-day technology operations, troubleshooting, and keeping critical business systems running.



Pricing Model

Services are billed on a time-and-materials basis using the following:

- Level 3 Lead : \$105 per hour
- After-Hours Support: \$150 per hour
- Travel time and mileage are billable.
- Invoices are issued monthly.

Staffing Consideration

To protect service continuity, the District agrees that it will not hire or engage BLaST technology staff assigned on-site at the District for a period of six (6) months following the conclusion of their on-site assignment.

Summary

This proposal allows East Lycoming School District to:

- Maintain technology stability during leadership transition
- Receive consistent senior-level on-site support
- Gain visibility into risks and upcoming needs
- Transition smoothly to a new Technology Director



2400 Reach Rd. - PO Box 3609
Williamsport, PA 17701
570.323.8561

33 Springbrook Drive
Canton, PA 17724
570.673.6001

WWW.IU17.ORG

Tim Confer
Director of Technology

Dr. Christina Steinbacher-Reed
Executive Director

SIGNATURE

SIGNATURE

DATE

DATE

PRINTED NAME:

PRINTED NAME:

SIGNATURE

SIGNATURE

TITLE

TITLE

DATE

DATE

March 3, 2026

Re: HHS Flex Period

Members of the Board

Mr. Ritter has requested a discussion on the end of day "FLEX" period for students in grades 7-12. The bulleted points below outline why the period was created and how it is utilized today.

Why was this period created:

- Allowed for a dedicated time inside the school day for student clubs and activities to meet. Prior to this, clubs had to meet after school preventing student attendance due to transportation.
- Provided a non-academic prior at the end of the day to minimize the missed class time by student athletes. Prior to this, athletes dismissed early for away events would miss the last class period or two.
- Creates an incentive for seniors. Seniors in good standing (grades, attendance, and behavior) may leave school beginning at 2:16 PM, the start of the flex period. This also alleviates traffic congestion in the parking lot at the end of the day.

How is this period used:

- *For students:*
 - To meet with teachers to make up missed work or tests.
 - To receive remediation in small groups.
 - To complete daily assignments before leaving school.
 - To actively participate in school clubs.
- *For teachers:*
 - Allows time for grade level team meetings and Department chair meetings.
 - Allows Special Education Teachers the opportunity to meet with their Students and provide support for upcoming assignments and tests.
 - Allows for special events like pep rallies and assemblies to take place without interrupting class time.

Respectfully,
Dr. Mark Stamm
Superintendent



March 3, 2026

Re: Ferrell Playground

Members of the Board,

As previously discussed with the Facility Committee and the board, I am recommending this final design for the new playground at Ferrell Elementary School. The total size of the playground will be 70 feet square and accommodate 97 students ages 2-12. The playground will be placed in the existing tennis court location which has an accessible paved walkway from school and is surrounded by a fence.

Total cost of equipment is \$171,500.00. Installation cost is \$74,105.00. Total project cost is \$245,605.00. This represents a \$12,000 decrease from the previous proposal due to the change in location. With the completion of this project, all three elementary schools will have new playgrounds with comparable equipment.

Picture Rocks will review and consider a 30 year lease of this space to the district for \$1.00 annually. If approved by Picture Rocks, this will also need approval by the Board on March 17.

Final approval for both the playground and the lease will be on the March 17 agenda.

Images and costs of the current layout are included for your discussion.

Sincerely,
Dr. Mark Stamm
Superintendent



800.262.8448
717.243.0439 Fax
ely@pa.net

PO Box 396
Carlisle, PA 17013

GeorgeElyAssociates.com

February 9, 2026

PROPOSAL

East Lycoming School District
Mark Stamm, Superintendent
349 Cemetery Street
Hughesville, PA 17737

Playground Equipment & Installation

George A. Ferrell Elementary School
Bryan McCaffery, Director of Buildings
and Grounds
570-932-1358
bmccaffery@elsd.org

COSTARS-014-E23-299

Playworld, Lewisburg, PA

1 ea. ZZXX039	Unity SpinR w/ 2 Accessible Seats		\$18,307.00
1 ea. 350-ARCH	3.5" Arch Swings 2 seats		\$3,196.00
2 ea. 350-ARCH-ADD	3.5" Arch Swings Add-A-Bay Unit	\$2068 ea.	\$4,136.00
1 ea. ZZXX0892	Accessible Swing Seat		\$1,680.00
1 ea. 500-2305	FUNderstorm		\$169,500.00
1 ea. ZZXX0430	Jumble Gym		\$8,497.00
			<u>\$205,316.00</u>
	Freight (\$4,980 value)		FREE
			<u>\$205,316.00</u>
	Discount		<u>(\$39,010.00)</u>
			\$166,304.00

Action Play Systems

76 ea. APS-Border12"	12" APS Playground Borders with 1 spike	\$34 ea.	\$2,584.00
4 ea. APS-ADAHalfRA	APS Half Ramp for use with APS Borders	\$513 ea.	\$2,052.00
			<u>\$4,636.00</u>
	Freight		\$560.00
			\$5,196.00

TOTAL For Playground Equipment \$171,500.00

Willow Playworks, Mifflinburg, PA

1 lot	Installation of above equipment, prevailing wage	\$65,880.00
1 lot	Removal of Existing Asphalt – 70' X 70' (4900 sq ft.)	<u>\$8,225.00</u>
	Saw Cut Asphalt @ perimeter, includes disposal of Removed Asphalt	
	Total for Installation and Asphalt Removal	\$74,105.00
	TOTAL for Equipment and Installation and Asphalt Removal	\$245,605.00

Color: Green and Grey

Prices include delivery and installation of equipment from Playworld

Prices do NOT include permits or bonds

Please allow 4-7 weeks for delivery

Payment Terms: 50% deposit, Balance due 20 days after installation completed

Prices are effective for 30 days

To place an order, please verify the above information, colors, indicate shipping & billing addresses, contact name & phone number, sign below & return...

TO PURCHASE: Please sign and return one copy of this quotation or confirm by email that you accept this proposal.

X _____
Signature

X _____
Print Name

Thank you, *Eric Grimes*

ADDITIONAL TERMS:

- Any hidden rock, concrete, or other debris requiring additional time and equipment will be billed at a time and material basis
- Installation includes excavation and concrete necessary for footers and piers only unless otherwise specified
- Site to be level or +/- 1% grade – or equipment designed for current grade
- Site must be free of geofabric, stone base, drainage systems, or any other digging impediments
- Site must have open access for equipment and machinery of a direct unimproved pathway at least 8' wide from equipment staging area
- Pour In Place Repairs – colors will not match due to wear/fading/aging of existing surfacing
- Assembly as per manufactures specifications
- Concrete footers as per manufactures specifications
- Clean area of debris from construction **Qualifications:**
- Priced per area as per owner and/or information provided at time of quote
- Prevailing Wages **Exclusions:**
- Permits, fees, bonds
- Sono Tube
- Multiple mobilizations, special access, night and holiday work ***ASTM 3313 Impact Attenuation Testing, available for an additional charge ASTM-F1487-21 Site Inspection, available for an additional charge***

Terms and Conditions

1. Customer acknowledges that prices, once under contract, for labor and materials supplied by Willow Playworks are valid for six (6) months after Customer's purchase order date and may be subject to escalation after said period. 2. Customer acknowledges that start and completion dates are only estimates and do not represent exact times for performance. Willow Playworks shall not be held liable for delays resulting from acts or omissions by owner, other trades, general contractor or any other person or entity or delays resulting from weather or any other uncontrollable situation or act of God. 3. Any deviations from the work or materials described in this Quotation may result in a revised Quotation or Change Order. 4. Customer acknowledges, represents, and warrants that any surface or substrate to which Customer has contracted Willow Playworks to install or apply materials or perform work have been properly constructed and prepared for the performance of Willow Playworks scope of work.

5. Customer acknowledges that, unless specifically stated in the Quotation details, Willow Playworks is not responsible for items including, but not limited to, flashing, caulking, sealers and admixes, prevailing wages

and union related dues, bonds, permits and special fees and trash removal. These items are the responsibility of Customer and/or other parties other than Willow Playworks. 6. All extensions of credit and terms shall be at the complete discretion of Willow Playworks. Willow Playworks reserves the right to refuse to extend credit or terms at any time.

7. Customer acknowledges and agrees that all purchases by Customer shall be paid for in accordance with the terms as stated in the Quotation specific terms. Any invoice not paid in full within the stated terms from invoice date will be subject to a finance charge of one and one-half percent (1 1/2%) per month. 8. Willow Playworks warrants that all goods sold shall, at the time of delivery, be free of defects. Customer agrees to notify Willow Playworks of any defect at the time of delivery, and further agrees that any claim for breach of warranty not made at that time shall be waived. Provided that timely notice of a defect is given, Willow Playworks will, at its discretion repair or replace any defective goods or, at its option, refund the purchase price of such goods. Willow Playworks makes no warranty in connection with goods subject to a manufacturer's warranty and any claim relating to such goods shall lie exclusively against that manufacturer. In no event shall Willow Playworks liability for defective goods exceed the cost of replacement thereof. Willow Playworks shall not, under any circumstances, be held liable to Customers or any other entities or persons for lost profits, additional expenses incurred in replacing defective goods, or any other special, incidental, indirect, or consequential losses or damages of any kind whatsoever. Except for the foregoing express warranty, NO WARRANTY OF MERCHANTABILITY OR WARRANTY OF FITNESS FOR A PARTICULAR PURPOSE, or any other warranty, express, statutory, or implied shall apply to any goods sold by Willow Playworks.

9. Customer shall indemnify, defend and hold harmless Willow Playworks , its workmen, agents, servants and employees, from any and all claims, fines, liabilities, penalties and damages, suits, actions, administrative proceedings, costs, losses, including, without limitation, reasonable attorney's fees, arising out of or resulting from any and all incidents involving projects for which Willow Playworks provided labor or materials where such incidents were not caused by the acts or omissions of Willow Playworks.

10. If that the Customer's account is referred to an attorney, or collection agency for collection, Customer agrees that Willow Playworks shall be entitled to collect, in addition to the principal and accrued finance charges, a fee of fifteen percent (15%) for collection plus out-of- pocket costs and expenses. 11. This agreement shall be governed by and construed in accordance with the laws of the Commonwealth of Pennsylvania. The parties agree that any claim or controversy arising from or relating to this agreement, directly or indirectly, may be litigated only in the state and federal courts located in the Commonwealth of Pennsylvania and the parties hereto consent to be subject to the jurisdiction of such courts.





March 3, 2026

Re: AR 907-01 and 907-02

Members of the Board

In response to changes to Policy 907 to facilitate board member classroom visits, I created two Administrative Regulations (AR) that will provide clarity and consistency for these visits. After discussing both with Attorney Kenyon, background clearances are not required. These are provided for your review and discussion.

AR 907-01 Board Member Observations
AR 907-02 Parent / Guardian Observations

Respectfully,
Dr. Mark Stamm
Superintendent

SCHOOL BOARD MEMBER

Classroom Observation Guidelines

Thank you for your interest in observing classroom instruction. These guidelines ensure your visits comply with Pennsylvania law while protecting student privacy and supporting our educational program.

1. OVERVIEW

Purpose of Board Observations:

- Understand instructional programs and resource needs
- Inform policy decisions with firsthand knowledge
- Evaluate effectiveness of district initiatives
- Support governance oversight responsibilities

Important:

Your observations are for governance purposes only. You are **not evaluating teachers**. Individual board members have no authority to direct staff or make commitments on behalf of the district.

Limitations:

In order to minimize educational disruption, Board Observations are limited to one (1) time per month for each board member and no more than one (1) observation per semester for each classroom teacher. Observations are limited to a typically class period which is 60 minutes (K-6) and 45 minutes (7-12).

2. Confidentiality Agreement

All board members must sign the ELSD confidentiality agreement annually. This document is available at the main office of each school building.

3. OBSERVATION PROCEDURES

BEFORE Your Observation

Scheduling Requirements (Minimum 5 school days advance notice):

- Submit written request to the Building Principal including:
 - Specific date and time
 - School and classroom / subject
 - Purpose/focus (e.g., 'Review math curriculum implementation')
- Wait for Principal approval and coordination

DURING Your Observation

Required Procedures:

- Sign in at building office upon arrival

- Obtain and wear district visitor identification badge
- A principal or other district staff member will walk you to the classroom
- Position yourself unobtrusively in the classroom
- At the conclusion of the classroom observation, report directly back to the main office to sign out and return the visitor identification badge

DO:

- Focus on instructional practices, curriculum, and resources
- Take notes about programs and teaching methods (not individual students)
- Stay for the agreed-upon duration

DO NOT:

- Interrupt instruction or redirect students
- Record student names or identifying information in notes
- Take photos or videos
- Evaluate or critique teacher or other staff performance
- Make commitments or promises to staff or students
- Discuss specific students by name

STUDENT PRIVACY PROTECTIONS

You are bound by federal FERPA, IDEA, and state privacy laws. You may NOT:

- Discuss individual student performance, behavior, or personal information
- Share information about which students have IEPs or 504 plans
- Disclose student health, family, or disciplinary information
- Use information learned during observations outside official board functions

Violations can result in personal liability, district liability, and removal from observation privileges.

AFTER Your Observation

- Return badge to office and sign out
- Maintain confidentiality of your notes; destroy when no longer needed

If You Have Concerns:

- Report ALL concerns through the Superintendent
 - Student safety issues: Report immediately to the building principal
 - Program/resource concerns: Submit to Superintendent
-

ACKNOWLEDGMENT AND SIGNATURE

I acknowledge that I have read and understand the requirements outlined in this document. I agree to comply with all Pennsylvania background check requirements, FERPA, IDEA, and student privacy protections. I understand that classroom observations are for governance purposes only and that I have no individual authority to direct staff or evaluate teacher performance.

Board Member Signature / Date

Thank you for your commitment to student safety, privacy, and educational excellence.

Parent / Guardian

Classroom Observation Guidelines

Thank you for your interest in observing classroom instruction. These guidelines ensure your visits comply with Pennsylvania law while protecting student privacy and supporting our educational program.

1. OVERVIEW

Purpose of Parent / Guardian Observations:

- Understand instructional programs provided to your student
- Better understand your student's strengths and needs in a school setting

Important:

Your observations are for observing the instructional program of your student and to observe your student only. You are **not evaluating teachers or other students**.

Limitations:

In order to minimize educational disruption, Classroom visits by Parents / Guardians are limited to one (1) time per month for each child and no more than one (1) observation per semester for each classroom teacher. Observations are limited to a typically class period which is 60 minutes (K-6) and 45 minutes (7-12).

2. REQUIRED CLEARANCES

All parents / guardians must sign the ELSD confidentiality agreement annually. This document is available at the main office of each school building.

3. OBSERVATION PROCEDURES

BEFORE Your Observation

Scheduling Requirements (Minimum 5 school days advance notice):

- Submit written request to the Building Principal including:
 - Specific date and time
 - School and classroom / subject
 - Purpose/focus (e.g., 'Better understand how my student interacts with his math lessons')
- Wait for Principal approval and coordination

DURING Your Observation

Required Procedures:

- Sign in at building office upon arrival
- Obtain and wear district visitor identification badge
- Principal or other district staff will walk you to the classroom
- Position yourself unobtrusively in the classroom
- At the conclusion of the classroom observation, report directly back to the main office to sign out and return the visitor identification badge

DO:

- Focus on instructional practices, curriculum, and your student
- Take notes regarding your student only
- Stay for the agreed-upon duration

DO NOT:

- Interrupt instruction or redirect students
- Record student names or identifying information in notes
- Take photos or videos
- Evaluate or critique teacher or other staff performance
- Make commitments or promises to staff or students
- Discuss specific students by name

STUDENT PRIVACY PROTECTIONS

You are bound by federal FERPA, IDEA, and state privacy laws. You may NOT:

- Discuss individual student performance, behavior, or personal information
- Share information about which students have IEPs or 504 plans
- Disclose student health, family, or disciplinary information
- *Violations can result in personal liability, district liability, and removal from future observation privileges.*

AFTER Your Observation

- Return badge to office and sign out
- Request brief conversation with principal (optional)
- Maintain confidentiality of your notes; destroy when no longer needed

If You Have Concerns:

- Report ALL concerns through the Building Principal
 - Student safety issues: Report immediately to the Building Principal
 - Program/resource concerns: Submit to Building Principal
-

ACKNOWLEDGMENT AND SIGNATURE

I acknowledge that I have read and understand the requirements outlined in this document. I agree to comply with all Pennsylvania background check requirements, FERPA, IDEA, and student privacy protections. I understand that classroom observations are for better understanding the curriculum for my student or to observe my student in the classroom setting.

Parent / Guardian Signature / Date

Thank you for your commitment to student safety, privacy, and educational excellence.