




SCHOOL DISTRICT OF OKALOOSA COUNTY  
TECHNICAL ASSISTANCE MEMORANDUM  
FINANCE

COPY

FINANCE TAM: 2003-013  
CONTACT: Debbie Bruce, Specialist  
Budgeting & Financial Services  
TELEPHONE: 833-7634

TO: Selected Principals/Bookkeepers  
FROM: Rita Scallan, Program Director - Finance   
DATE: June 06, 2003  
SUBJECT: Plan of Care (6<sup>th</sup> Grade Retentions) - Summer - June 2003 Allocation - Project 3124

The Finance Department has received the 6<sup>th</sup> grade student retention data for Fiscal Year 2002-2003 from J.C. Connor, Chief Information Officer for the District. As a result, the "Plan of Care - Summer Remediation, 2003" project allocation has been placed in each school's budget.

A new project has been established for the "Plan of Care - Summer Remediation 2003". Each School's allocation has been placed in the new project (#3124). Your school should be able to access the funds on Friday, June 9, 2003.

Attached you will find a spreadsheet entitled "Plan of Care Project - Summer Remediation 2003 Allocation" which lists each school that had retentions in grades in grade 6, the allocation per retention, and the total allocation per school. The allocation methodology (See Attachment) used to determine a school's funding level is the total number of retained students (grade 6) times \$400 per student. Please refer to the Superintendent's E-Mail (See Attachment) dated May 7, 2003 for guidance and direction on the intent and use of funds.

In order to pay non-instructional employees and all new hires from the "Plan of Care - Summer Remediation" funds, your school should submit a "Recommendation of Employment" form to the Human Resources Department. A MIS 3386 Transfer of Funds form will not be required because employee(s) will be paid through Object 0750 (Other Personnel Services). All instructional employees should be paid utilizing form MIS 3180 Other Compensation (Object 0102).

Should you have any questions or need additional information regarding budget issues, please contact Debbie Bruce at 833-7634. If you have questions regarding payroll issues, please contact Debby Fetner at 833-3650. If you have questions regarding the appropriate use of Second Chance funds, please contact the Quality Assurance Department at 833-3165.

**Please note: The Second Chance Project (#3113) for Fiscal Year 2002-2003 is closed. The project will be opened to process June, 2003 payroll and currently encumbered purchase orders if the materials have been received.**

Attachments

C: Superintendent  
Assistant Superintendents  
Chief Officer - Human Resources  
Chief Officer - Quality Assurance  
Chief Information Officer - MIS  
Chief Financial Officer  
Program Director - Community Relations

OKALOOSA COUNTY SCHOOL DISTRICT  
 PLAN OF CARE PROJECT - SUMMER  
 SUMMARY INFORMATION  
 6TH GRADE RETENTIONS  
 FISCAL YEAR 2002-2003  
 June 6, 2003

COST		NUMBER OF	ALLOCATION	TOTAL
CENTER	SCHOOL NAME	6th GRADE RETENTIONS	PER RETENTION	ALLOCATION
0751	Antioch Elementary	-	\$400	-
0041	Baker School	14	\$400	5,600.00
0741	Bluewater Elementary	-	\$400	-
0051	Bob Sikes Elementary	-	\$400	-
0651	Bruner Middle School	40	\$400	16,000.00
0161	Cherokee Elementary	-	\$400	-
0582	Choctaw Academy	-	\$400	-
0581	Choctawhatchee High School	-	\$400	-
0601	Crestview High School	-	\$400	-
0602	Crestview Vocational School	-	\$400	-
0761	Davidson Middle School	14	\$400	5,600.00
0131	Destin Elementary	-	\$400	-
0771	Destin Middle at Regatta Bay	3	\$400	1,200.00
0151	Edge Elementary	-	\$400	-
0031	Edwins Elementary	-	\$400	-
0541	Elliott Point Elementary	-	\$400	-
0631	Florosa Elementary	-	\$400	-
0641	Fort Walton Beach High School	-	\$400	-
0642	FWB Success Academy	-	\$400	-
0621	Kenwood Elementary	-	\$400	-
0201	Laurel Hill School	1	\$400	400.00
0671	Lewis Middle School	4	\$400	1,600.00
0681	Longwood Elementary	-	\$400	-
0561	Mary Esther Elementary	-	\$400	-
0082	Meigs Middle School	18	\$400	7,200.00
0211	Niceville High School	-	\$400	-
0222	Northwood Elementary	-	\$400	-
0441	Oak Hill Elementary	-	\$400	-
0551	Ocean City Elementary	-	\$400	-
0701	Okaloosa Applied Technology Center	-	\$400	-
9820	Okaloosa Blended School	-	\$400	-
0571	Plew Elementary	-	\$400	-
0271	Pryor Middle School	25	\$400	10,000.00
0092	Richbourg Middle School	39	\$400	15,600.00
0121	Ruckel Middle School	13	\$400	5,200.00
0431	Shalimar Elementary	-	\$400	-
0241	Silver Sands School	-	\$400	-
0251	Southside Elementary	-	\$400	-
0261	Valparaiso Elementary	-	\$400	-
0111	W. E. Combs School	-	\$400	-
0731	Walker Elementary	-	\$400	-
0281	Wright Elementary	-	\$400	-
<b>TOTALS</b>		<b>171.00</b>		<b>68,400.00</b>

# Year-Around Plan of Care For Students Who Are Retained

*A Technical Assistance Note for Elementary  
Principals, Guidance Counselors, and Teachers  
May 7, 2003*

## **Discussion:**

If initial 2003 FCAT results are a reliable indicator of all results for all grades, the end of social promotions and the application of stronger academic standards have resulted in significantly higher academic performance in Okaloosa County. In 2002, Okaloosa County achieved historic high scores. In 2003, initial results indicate that students are reading even better, writing even better, and doing math even better.

Three years ago a third of our high school students failed the FCAT. This year more than 97 percent of our seniors will graduate after having passed the FCAT and satisfying all other graduation requirements.

These results are a credit to students, their parents and teachers, and school principals and counselors who have faithfully carried out our mission of better academic performance through more effective instruction and a more serious commitment to learning.

An inevitable impact of higher standards has been student retentions. Largely this is due to a legacy of social promotions – more than a decade of passing students along to the next teacher, the next grade, the next school even though these children were operating well below grade level. As a result, there are 10<sup>th</sup> graders who read at a 3<sup>rd</sup> grade level. Stopping social promotions has meant that literally thousands of students who were victims of this practice now find themselves behind and needing more and different kinds of help from schools in order to catch up.

Okaloosa Schools did not wait until the end of the 2002-2003 school year to deal with this year's potential retentions. Beginning in August and September, our teachers met with parents to create academic improvement plans. Research-based reading and math strategies were employed. Teaching was more instructionally sound than ever. Significantly improved FCAT scores suggest that this spring, the number of non-ESE third grade retentions will be half as many as last year. This is a highly positive signal indicating the value of better instruction.

Of course, this year with ESE students now being evaluated for the first time on the same basis as other students, overall retentions will go up, at least for a time, until ESE instruction and assessment are better aligned. We're committed to supporting ESE teachers and students in achieving that result.

For the 2002-2003 school year, 518 elementary students were retained. Many were a year or two or three below grade level. These students were not sent back to the same classrooms and subjected to the same teaching methods. Instead, an individualized "Plan of Care" was developed jointly by the parents and the school to identify each student's deficiencies and the most effective ways to help at home and at school.

For the 2002-2003 school year, the School Board established a "Second Chance Fund" of \$2,000 for each retained student in addition to the resources that ordinarily are expended for that student. A retained child's parents and teacher worked together to decide how those extra dollars would be spent over and above the regular school day to help the student succeed. Extraordinary parent participation was achieved in this process. After school, before school, and Saturday tutoring were paid for. Sessions at Sylvan Learning Center were offered. Additional materials, including computer software to use at home, were provided. A subscription to the newspaper was offered. Mentors were recruited. Other creative strategies were used.

Initially, the hope was that half of retained students might be able to catch up at least one year with better teaching methods in the classroom and the additional resources provided by the "Second Chance Fund." Based on the FCAT results thus far received from the state, the "second chance" program has substantially exceeded our expectations. Considering third grade performance, it appears that *between 80 percent and 90 percent of 2002-2003 retained students will be promoted at the end of the 2003-2004 school year based on their own academic achievement, which includes passing the FCAT.* They and their parents and their teachers have risen to higher expectations and, in many cases, the students have accomplished two or more years of learning gains in one year.

Okaloosa's "Plan of Care" – combining high standards, more effective teaching methods, uninflated grades, substantial extra help, and increased parental involvement and responsibility – is a remarkable success. State legislative leaders have asked us to help craft legislation that would extend this now-proven approach to remediation throughout the state.

Many teachers, parents, and principals have suggested that, as effective as "Plan of Care" has turned out to be, it should be initiated not in August and September when school resumes but in June and July. In other words, students who are retained should be able to begin receiving extra help during the summer prior to the opening of school.

This idea to make "Plan of Care" a year-around commitment is consistent with Governor Bush's call for remediation efforts in the summer. While the Governor has restricted his summer remediation initiative to retained third graders, Okaloosa has decided to provide year-around "Plan of Care" services to all retained elementary students.

## **How Schools Should Implement "Year-Around Plan of Care" Beginning in June, 2003**

*In principle and in practice, simply begin "Plan of Care" this summer instead of waiting until the fall and follow the same successful approaches you used during this past school year.*

1. Schools are already notifying families of students who are candidates for retention and inviting them to come to the school. Either at those meetings or during a subsequent conversation, let parents and students know about "Plan of Care" and about our commitment to provide extra resources and additional help. Let them know how successful "Plan of Care" was this year in assisting students in catching up and earning their academic promotions.
2. Instead of beginning in August, as we did this year, hold an initial "Plan of Care" meeting with parents of retained students by June 13. The initial plan can be developed by the parent and a teacher or counselor selected by the principal. This may or may not be the student's teacher last year or next year but should be a counselor or teacher well-versed in research-based learning strategies and able to interpret testing results to parents. The meeting should also include the principal. "Plan of Care" strategies, such as tutoring, can begin immediately this summer after you have an initial plan. Schedules can be worked around the summer plans of parents, tutors, and others involved.
3. Initial "Plans of Care" started in the summer should focus on reading and mathematics and should be very specific as to deficiencies and short-term strategies that can be pursued before school starts again.
4. If appropriate, the "Year-Around Plan of Care" may be an extension of the student's current plan for 2002-2003 or may be a transition plan until the student is assigned a teacher for next year and a "Plan of Care" meeting is held in August.

5. The Superintendent expects to propose to the School Board a continuation of last year's "Second Chance Fund" of \$2,000 per retained student. Of course, the precise amount will depend upon the Legislature's budget which, it seems, will not be finished until the end of May. The \$2,000 per student amount could go down depending on legislative decisions.
6. The same forms and options as you've used for "Plan of Care" students in the 2002-2003 school year are available for the "Year-Around Plan of Care": Sylvan Learning Center, tutors employed directly by the school, software that can be used at home, newspaper subscriptions, and mentors. Use effective instructional methods, just as you did over the past several months. *In order to manage this fund carefully for each student, we recommend that during the summer you expend no more than about \$400 of the hoped-for \$2,000 "Second Chance Fund" per retained student. The CFO will deposit in your "Second Chance" account an amount equal to \$400 per retained student as soon as you report your numbers to us.*
7. The pay rate for tutors employed by the school is the same as in 2002-2003. The payment plan for Sylvan is the same as 2002-2003. Although we experienced a very high "show up" rate by students at Sylvan, the only money paid to Sylvan is money earned by actual tutoring that takes place.
8. Since your school is open during the summer, tutoring or small group instruction called for in "Plans of Care" should take place at the student's home school. Transportation won't be provided; however, the 80 percent "show up" rate at Sylvan strongly suggests that if parents are motivated to obtain extra help for their children, transportation issues can be overcome.
9. The "Year Around Plan of Care" for 2003-2004 for each student will be modified when the student is administered the Gates-MacGinitie, or equivalent, in August of 2003. In those exceptional cases in which students make remarkable progress over a short period of time and are academically qualified for promotion based on testing results, the principal is able to place the student appropriately as has always been the case.
10. This Technical Assistance Note will be published on the district's website and made available to the public. Please ensure that your teachers and concerned parents receive a copy, as well. Put it on your school website. Please contact your Assistant Superintendent with any questions.

Issued at 2:00 p.m., May 7, 2003  
Superintendent Don Gaetz