




**SCHOOL DISTRICT OF OKALOOSA COUNTY
TECHNICAL ASSISTANCE MEMORANDUM
FINANCE**

FINANCE TAM: 2007-008
CONTACT: Debbie Bruce, Specialist
Budgeting & Financial Services
TELEPHONE: 833-5827

TO: Selected Principals
FROM: Rita Scallan, Director – Finance 
DATE: September 12, 2006
SUBJECT: Plan of Care Allocation – Project 6113 – Fiscal Year 2006-2007

The Finance Department has received the final numbers for the Plan of Care students for fiscal year 2006-2007 based on capture data as of August 31, 2006. The Plan of Care (POC) funds have been allocated based on the following methodology:

- \$2,000 per retained elementary and middle school students less the summer remediation allocation of \$400 per student,
- \$500 per high school student who did not pass the March 2006 FCAT or the June 2006 FCAT retake less the amount to paid to high schools in July 2006, and
- \$1,000 per 9th/10th grade student who is at least one core credit short of advancement at the beginning of the school year less the amount paid to high schools in July 2006.

The new funds for fiscal year 2006-2007 have been allocated to 1010-5100-0310-Your Cost Center-Project 6113.

Attached are two spreadsheets: "Plan of Care Allocation – Summary" and "Plan of Care Allocation – Detail." The "Plan of Care Allocation – Summary" spreadsheet lists each school which has POC students (based on data received from IS), the total allocation per school, the amount paid to each school in July 2006, and the remaining balance due which is being allocated today. The "Plan of Care Allocation – Detail" spreadsheet provides each student's name, grade, total allocation for that student, the amount the school received in July 2006, and the remaining balance due for each student. *All Plan of Care – SAI Project #6113 funds should be expended by May 2007.*

Enclosed in the POC Project packets are forms and instructions to facilitate each school in submitting compensation for teachers and tutors participating in the program and providing students with much needed additional educational services. Enclosed are the following:

- Payroll forms and instructions
- POC Capture Dates and Payment Schedule
- Copies of Memorandums of Agreement between the School District and OCEA outlining the rules and process to be used relating to personnel.

Should you have any questions or need additional information regarding POC, please contact the following individuals based on subject area:

1. Budget Issues – Debbie Bruce at 833-5827.
2. Payroll Issues – Debby Fetner at 833-5849.
3. Appropriate Use of Plan of Care funds – Guyla Hendricks, Quality Assurance, at 833-5860.
4. Student Data – J.C. Connor or Wendy Meserve, Information Systems, at 689-7149.

C: Superintendent
Cabinet Members
OCEA
School Budget Bookkeepers

OKALOOSA COUNTY SCHOOL DISTRICT
PLAN OF CARE - REGULAR ALLOCATION - SUMMARY
ALL SCHOOLS
CAPTURE DATE - AUGUST 31, 2006
FY 2006-2007

	School	Allocation	Amount Paid in July 2006	Balance Due
0031	Edwins Elementary School	59,600.00	10,800.00	48,800.00
0041	Baker School	131,000.00	29,400.00	101,600.00
0051	Bob Sikes Elementary School	76,800.00	19,200.00	57,600.00
0082	Meigs Middle School	21,200.00	8,000.00	13,200.00
0092	Richbourg Middle School	36,400.00	8,800.00	27,600.00
0111	W. E. Combs School	500.00	-	500.00
0121	Ruckel Middle School	18,400.00	8,800.00	9,600.00
0131	Destin Elementary School	66,800.00	18,000.00	48,800.00
0151	Edge Elementary School	54,800.00	12,000.00	42,800.00
0161	Cherokee Elementary School	4,800.00	-	4,800.00
0201	Laurel Hill School	63,200.00	21,400.00	41,800.00
0211	Niceville High School	81,500.00	52,500.00	29,000.00
0222	Northwood Elementary School	88,000.00	400.00	87,600.00
0251	Southside Elementary School	62,800.00	19,200.00	43,600.00
0261	Valparaiso Elementary School	46,800.00	10,000.00	36,800.00
0271	Pryor Middle School	31,600.00	4,000.00	27,600.00
0281	Wright Elementary School	90,400.00	29,200.00	61,200.00
0431	Shalimar Elementary School	40,800.00	11,200.00	29,600.00
0441	Oak Hill Elementary School	26,000.00	-	26,000.00
0541	Elliott Pt. Elementary School	66,400.00	15,600.00	50,800.00
0551	Ocean City Elementary School	54,400.00	12,400.00	42,000.00
0561	Mary Esther Elementary School	56,000.00	10,800.00	45,200.00
0571	Plew Elementary School	28,800.00	3,600.00	25,200.00
0581	Choctawhatchee High School	123,500.00	43,000.00	80,500.00
0582	Choctaw Academy	1,500.00	500.00	1,000.00
0601	Crestview High School	90,000.00	52,000.00	38,000.00
0602	Crestview Vo Tech	500.00	-	500.00
0604	North Okaloosa Institute	11,500.00	7,500.00	4,000.00
0621	Kenwood Elementary School	51,200.00	11,600.00	39,600.00
0631	Florosa Elementary School	50,800.00	11,200.00	39,600.00
0641	Ft. Walton Beach High School	124,000.00	28,500.00	95,500.00
0642	Ft. Walton Academy	1,500.00	-	1,500.00
0651	Bruner Middle School	26,800.00	400.00	26,400.00

**OKALOOSA COUNTY SCHOOL DISTRICT
PLAN OF CARE - REGULAR ALLOCATION - SUMMARY
ALL SCHOOLS
CAPTURE DATE - AUGUST 31, 2006
FY 2006-2007**

School		Allocation	Amount Paid in July 2006	Balance Due
0671	Lewis Middle School	10,000.00	3,600.00	6,400.00
0681	Longwood Elementary School	51,600.00	12,000.00	39,600.00
0701	Okaloosa Applied Technology Center	20,500.00	-	20,500.00
0731	Walker Elementary School	38,800.00	7,200.00	31,600.00
0741	Bluewater Elementary School	15,600.00	4,400.00	11,200.00
0751	Antioch Elementary School	54,800.00	6,400.00	48,400.00
0761	Davidson Middle School	33,600.00	5,200.00	28,400.00
0771	Destin Middle School	10,000.00	4,400.00	5,600.00
0781	Emerald Coast Career Institute South	23,800.00	4,400.00	19,400.00
0791	Emerald Coast Career Institute North	27,100.00	3,600.00	23,500.00
9810	Gulf Coast Youth Academy	18,900.00	14,200.00	4,700.00
9811	Okaloosa Youth Development Center	32,600.00	15,700.00	16,900.00
9812	Okaloosa Youth Academy	23,500.00	11,000.00	12,500.00
9813	Okaloosa Regional Detention Center	1,600.00	-	1,600.00
9814	Adol Sub Abuse Program	1,500.00	1,500.00	-
9816	Gulf Coast Treatment Center	3,400.00	3,400.00	-
9817	Milton Girls Juvenile Res Facility	28,300.00	13,400.00	14,900.00
TOTALS - ALL SCHOOLS		2,083,900.00	570,400.00	1,513,500.00

Okaloosa County School District
Plan of Care – Project #6113
Instructions for Submitting Payroll
Fiscal Year 2006-2007

Pursuant to the Memorandums of Agreement, entered into between the School District and OCEA on July 24, 2002, regarding the compensation of instructional staff for teacher/parent meetings of retained students and the compensation of tutors for before and/or after school tutoring for retained students, the instructions listed below should be followed:

I) Teacher/Parent Meetings of Retained Students

- A) Submit an Other Compensation Form MIS 3180 (*see attachment*) to the Payroll Department with your regular monthly payroll.
- B) In the Description field, list the name of the student, date of the meeting, teacher's name, social security number and job ID.
- C) The Time column should reflect two (2) hours for each teacher. The Memorandum of Agreement **guarantees** compensation for two hours regardless of the number of actual hours worked.
- D) The Total column should reflect \$50 (two hours times \$25 per hour).
- E) Indicate the account strip to be charged (1010, 5100, 0102, your cost center number, 6113).
- F) Payments are eligible to be paid beginning with the September 2006 payroll.

II) Before and/or After School Tutoring (refer to memorandum of agreement for selection criteria)

- A) **Current employees who tutor before and/or after school:**
 - 1) Submit an Other Compensation Form MIS 3180 (*see attachment*) to the Payroll Department with your regular monthly payroll.
 - 2) In the Description field, indicate Plan of Care tutoring, date of tutoring session, teacher's name, social security number and job ID.
 - 3) Refer to the Memorandum of Agreement or call the Payroll Department for assistance in the appropriate hours and compensation to list in the Time and Total Columns.
 - 4) Indicate the account strip to be charged (1010, 5100, 0102, your cost center, 6113).
- A) **New Hire:**
 - 1) A **Completed** application and **Cleared Fingerprints** must be on file in the Human Resources Department before an individual may work, even for a day. After verification of application and fingerprints, submit a Recommendation for Employment Form MIS 5047 (*see attachment*) to the Human Resources Department hiring the individual as a temporary tutor. The account strip to be charged is (1010, 5100, 0750, your cost center, 6113).
 - 2) Submit only the hours worked on the Payroll Time Report to the Payroll Department.

Should you have any questions or need additional information please call Debby Fetner at 833-5849.

SCHOOL DISTRICT OF OKALOOSA COUNTY
HUMAN RESOURCES DEPARTMENT
RECOMMENDATION FOR EMPLOYMENT

MIS 5047
REV 6/2002

This section to be completed by Principal/Department Director

(Mr.) (Mrs.) (Miss) _____
Legal Name of Applicant Social Security Number

is officially recommended for employment for this ☐ regularly established or ☐ temporary position.

Specify Job Title _____ Center/Department _____

SLOT: ☐ 12 month ☐ 10 month ☐ 9 month ☐ daily ☐ hourly Hours per day/week _____
(Circle one)

This position is offered to: (check one, describe)

☐ fill a vacant position previously held by _____, who resigned/retired/other, or
transferred to _____
Name of Person in the position of _____
School/Department Specify Job Title

☐ fill a vacancy created by Board approved extended leave for _____

☐ fill a newly allocated position (MIS Form #3386-Transfer of funds sent to Finance)

Funding strip: _____
percent fund function object center project

percent fund function object center project

Date recommended for employment to begin: ____/____/____. If this position is temporary or is
Month/Day/Year
not expected to continue as a permanent position, the last day of this employment will be ____/____/____.
Month/Day/Year

Authorized signature (Principal/Dept. Head/Other) _____ Job Title _____
Month/Day/Year

Note to Applicant: Personal data is to be completed by applicant after offer of employment is signed by authorized administrator; i.e., Principal/Department Director. It is the responsibility of the applicant to bring completed "Recommendation For Employment" form to the Human Resources Department, 120 Lowery Place, S.E., Fort Walton Beach, Florida, within 2 working days of receipt and prior to effective date of employment. Do not report to work before processing your employment recommendation. CALL FIRST TO SIGN UP. Contacts and phone numbers below.

INSTRUCTIONAL: D.J. KRAMER/833-3141

EDUCATIONAL SUPPORT: LINDA RUSNAK/833-3142

Race _____ Sex _____ Birthdate ____/____/____ Marital Status: M ☐ D ☐ W ☐ S ☐ L ☐
Month/Day/Year

If married, give name and social security number of spouse:

_____ Name of Spouse Social Security Number

Handicapping Condition (if applicable)

☐ Physically Impaired ☐ Visually Impaired ☐ Other
☐ Speech Impaired ☐ Hearing Impaired

For Personnel Use Only

Input: _____ Date ____/____/____
Verify: _____ Date ____/____/____
Leave advanced _____

**SCHOOL DISTRICT OF OKALOOSA COUNTY
FINANCE DEPARTMENT
OTHER COMPENSATION REPORT**

MIS 3180
Rev. 9/03

Activity Date: _____ Description: _____

Funding: _____

Fund	Function	Object	Center	Project
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INSTRUCTIONS:

- ◆ List only *one* entry per employee per activity.
- ◆ Attach a signed Other Compensation Report Time Sheet (MIS 3475) for *each* employee listed.
- ◆ Do not report substitutes on this form – all subs must be reported by school on a Substitute Time Report.

EMPLOYEE NAME	SOCIAL SECURITY #	JOB ID	TIME (HRS)	TOTAL \$

Approved: _____

Signature of Principal/Department Head

Date

FOR PAYROLL USE ONLY	
RUN #	
BATCH #	
DATE ENTERED	
INITIALS	

PLAN OF CARE CAPTURE DATES AND PAYMENT SCHEDULE

ELEMENTARY AND MIDDLE SCHOOLS

The following are the capture dates for Plan of Care data and the resulting payment schedule. The Plan of Care cycle starts June 1 of every year and ends the next May 1.

Capture Date (Screen S707)	Requirements	Payment
June 15	Summer Plan of Care	\$400
August 31	Plan of Care	\$2,000 less Summer Payments
December 1	Plan of Care – New Students to District	\$2,000
March 1	Plan of Care – New Students to District	\$2,000

Notes:

- Payments will only be made from data collected on the set data collection dates.
- No other interim payments will be made.
- Students transferring to another school in the district will have their POC allocation transferred on a “pro rata” basis as agreed upon by both the sending and receiving school.

PLAN OF CARE CAPTURE DATES AND PAYMENT SCHEDULE

HIGH SCHOOLS – GRADES 10-12

The following are the capture dates for Plan of Care data and the resulting payment schedule. The Plan of Care cycle starts June 1 of every year and ends the next May 1.

Capture Date (Screen S707)	Requirements	Payment
June 15	March FCAT Failure – Attending Summer School	\$500
August 31	March FCAT Failure – Not Paid in June	\$500
	June FCAT Retake Failure	\$500
December 1	October FCAT Retake Failure	\$500
March 1	February FCAT Retake Failure	\$500

Notes:

- Payments will only be made from data collected on the set data collection dates.
- No other interim payments will be made.
- Students transferring to another school in the district will have their POC allocation transferred on a “pro rata” basis as agreed upon by both the sending and receiving school.

Memorandum of Agreement
between
Okaloosa County School Board
and
Okaloosa County Education Association

The question has arisen as to whether counselors should sit in on meetings between parents and retained students.

The Okaloosa County Education Association and the Okaloosa County School District agree that if a teacher and the principal agree it is educationally necessary for the counselor to be present, counselors may be asked to attend for part of the meeting. Counselors should only be present when the discussion is about testing or issues the counselor is directly involved in. Counselors will be compensated \$25.00 per meeting. The decision about whether or not a counselor will attend the meeting must be decided on an individual basis. The principal and teacher should sign a document which indicates they have agreed that having the counselor for part of the meeting was educationally necessary.

For OCEA:

Sheila J. Olsen
Signature Date 8/08/02

For the School Board:

Michelle Fegredo 8/07/02
Signature Date

Sworn to and subscribed before me this 7th day of August, 2002.

Betty Jo Holloway
Notary Signature

Seal:



Memorandum of Agreement
between
Okaloosa County School Board
and
Okaloosa County Education Association

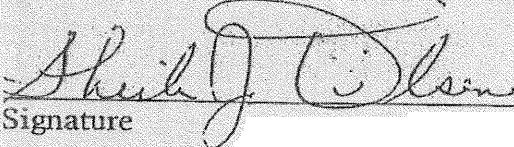
The Okaloosa County Education Association and the Okaloosa County School District agree to the following arrangements for teachers to meet with parents of retained students:

Teachers will be required to arrange meetings at mutually agreeable times with parents for each retained student they have. *NOTE:* This may require the presence of two teachers in the case of ESE students who are served by resource teachers.

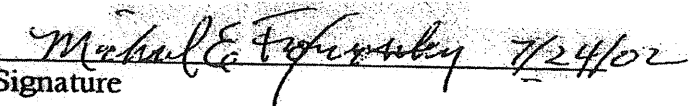
2. If the meeting occurs out of the 7.5 hour day, teachers will be compensated \$25.00 per hour for each meeting. They will be guaranteed a minimum of two (2) hours per student. No compensation will be given for hours beyond two (2) hours.
- 3 Teachers may request, on an individual meeting basis, the presence of an administrator if they feel it is warranted. Administrators shall honor such requests.

For OCEA.

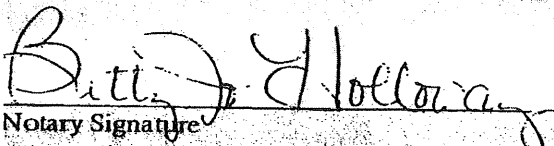
For the School Board:


Signature

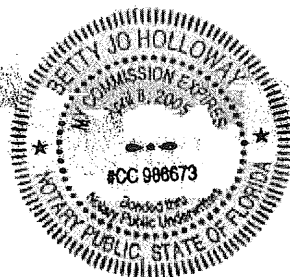
7-24-2002
Date


Signature

Sworn to and subscribed before me this 24th day of July, 2002


Notary Signature

Seal:



Memorandum of Agreement
between
Okaloosa County School Board
and
Okaloosa County Education Association

The Okaloosa County Education Association and the Okaloosa County School District agree to the following which may relate to retention plans that involve before and after school tutoring:

Selection of tutors.

- A Certification in the area to be taught shall be the first criteria. No position shall be offered to a person who is not certified in the area to be taught if there is a volunteer in the bargaining unit who is certified in that area.
- B Priority will be given to district employees who are members of the instructional bargaining unit.
- C If more than one bargaining unit member applies, the position should be offered based on criteria found in *Article IX, Section B, #5* of the Master Contract. (See attached)

Pay:
Compensation should be based on "Memorandum of Agreement" dated 1/14/99 and 3/1/99. (See attached)

Security:
If a teacher feels security problems exist during the teaching period of the remediation program at his/her school, they should reference *Article V, Section E* of the Master Contract. If this does not resolve the problem, they should forward their concerns to the Superintendent. (See attached)

Eligibility Recommendations:
Tutoring classes should, under best practices, be limited to from 3 to 5 students at one time. Efforts should be made not to exceed 5 students in a tutoring situation.

Discipline:
Teachers should send written documentation of poor behavior to the principal, should a student be moved to another tutor or denied the right to continue in the program. *A student should*

Resignation:
If a teacher wishes to resign from their tutoring assignment, they may do so with two (2) weeks notice to the principal. The teacher shall suffer no penalty or recrimination as long as adequate notice is given. The principal shall make efforts to fill the position before the full two (2) weeks is up.

For OCEA:

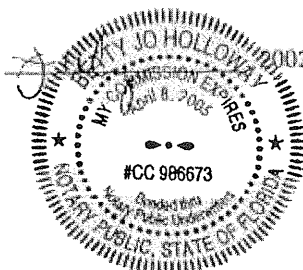
Philip J. Olsen 7-24-2002
Signature Date

For the School Board:

Michael E. Fowles 7/24/02
Signature Date

Sworn to and subscribed before me this 24th day of

Betty Jo Holloway
Notary Signature Seal:



Memorandum of Agreement
between
Okaloosa County School Board
and
Okaloosa County Education Association

The Okaloosa County Education Association and the Okaloosa County School District agree to the following rates of compensation for district or school run programs:

- Detention: The regular rate of pay for supervising detention outside the regular work day shall be \$10 per hour. Any employee who supervises a Saturday detention shall be paid for a minimum of 5 hours.
- 2) School or district tutoring programs: All certified personnel who tutor in a district or school program shall be compensated at the hourly rate found in Appendix G of the Master Contract. Noncertified personnel shall be compensated at the rate of \$15 per hour.

Employees shall participate in the above programs on a voluntary basis.

For OCEA

Michael E. Foxworthy

1-14-99
Date

For the School Board

Rebecca Spencer

1.14.99
Date



Betty Jo Holloway
My Commission CC636783
Expires April 08, 2001

Betty Jo Holloway
1/14/99

Memorandum of Agreement
Between
Okaloosa County School Board
and
Okaloosa County Education Association

Regular teachers who teach a period beyond contractual obligation shall be reported for an additional hour under the hourly rate in the Contract for each of the 196 contractual days including paid holidays, workdays, and sick days. They should not be reported for the additional hour for any days they are not paid (example: unpaid sick leave, suspension without pay, etc.).

For OCEA

For the School Board

Michael Foxworthy
Michael Foxworthy

Becky Spence
Becky Spence

3/1/99
Date

3.1.99
Date

Sworn to and subscribed before me this 1st day
of March, 1999.

Betty Jo Holloway
Notary Public Signature

Seal:



Betty Jo Holloway
My Commission CC636783
Expires April 08, 2001

Article IX - Transfers & Reassignments

B. Voluntary Transfers

5. In acting on requests for voluntary reassignments and/or transfers the following criteria will be applied:
 - a. length of continuous services within the bargaining unit,
 - b. instructional requirements,
 - c. individual or personal qualifications and evaluations,
 - d. specialty experience, and
 - e. principal's acceptance of applicant.

Article V - Teaching Conditions

- E. Each teacher shall report any unsafe or hazardous conditions, in writing, to the principal as soon as practicable.