



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


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FINANCE TAM: 2008-027

CONTACT: Julie Perry, Accountant  
Budgeting & Financial Services

TELEPHONE: 833-5850

TO: School Principals

FROM: Debbie Bruce, Director – Budgeting & Financial Services 

DATE: November 13, 2007

SUBJECT: Plan of Care - November Allocation – Project 6113  
Fiscal Year 2007-2008

Information Systems has provided the number of students eligible for Plan of Care as of November 9, 2007. Please find attached two spreadsheets: (1) "Plan of Care November Allocation – Summary," and (2) "Plan of Care November Allocation – Detail." The "Plan of Care November Allocation – Summary" spreadsheet includes each school's number of active and eligible students, allocation per student, and total POC allocation. The "Plan of Care November Allocation – Detail" spreadsheet provides each student's grade, name, referral date, and the amount of the November allocation.

*Your school's POC allocation has been budgeted to 1010-5100-0310-Your Cost Center-Project 6113.*

Additional POC Information:

1. Elementary and Middle Schools will receive \$400 for each active and eligible POC student.
2. High Schools will not receive an allocation in November.
3. There will be no "back pay" of funds for students not entered on Panel S707 before November 9, 2007. If a student is referred after this date, the student will be eligible for future POC allocations.
4. For Elementary and Middle School students active and eligible, there will be one more allocation of \$400 on January 16, 2008.
5. For High School students active and eligible, there will be one more allocation of \$500 on January 16, 2008.
6. If a POC student transfers to another school in the District within ten school days of the allocation date, the funds must transfer with the student. The transferring school must request a transfer of the new POC allocation to the receiving school by e-mailing Julie Perry with the student's name and the name of the receiving school. Once the ten-day window has passed, the receiving school must wait until the next capture date.
7. Attached are payroll forms and instructions to facilitate each school in submitting compensation for teachers and tutors participating in the POC program.
8. Copies of Memorandums of Agreement between the School District and OCEA outlining the rules and process to be used relating to personnel are also attached for your information.

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

1. Budget Issues – Julie Perry at 833-5850,
2. Payroll Issues – Debby Fetner at 833-5849,
3. Appropriate Use of Plan of Care funds – Guyla Hendricks, Quality Assurance, at 833-5860, and
4. Student Data – J.C. Connor or Wendy Meserve, Information Systems, at 689-7149.

**Attachments**

cc: Executive Staff  
OCEA  
School Budget Bookkeepers

SCHOOL DISTRICT OF OKALOOSA COUNTY  
 PLAN OF CARE NOVEMBER ALLOCATION - SUMMARY  
 DATA AS OF NOVEMBER 9, 2007 - PROVIDED BY INFORMATION SYSTEMS  
 FISCAL YEAR 2007-2008  
 NOVEMBER 13, 2007

CENTER	SCHOOL	ELEMENTARY & MIDDLE			HIGH SCHOOL - N/A			TOTAL ALLOCATION
		NO. OF STUDENTS	ALLOCATION PER STUDENT	POC ALLOCATION	NO. OF STUDENTS	ALLOCATION PER STUDENT	POC ALLOCATION	
0031	EDWINS ELEMENTARY	20	\$ 400	\$ 8,000	-	\$ 500	\$ -	\$ 8,000
0041	BAKER SCHOOL	43	400	17,200	-	500	-	17,200
0051	BOB SIKES ELEMENTARY	34	400	13,600	-	500	-	13,600
0082	MEIGS MIDDLE	12	400	4,800	-	500	-	4,800
0092	RICHBourg MIDDLE	35	400	14,000	-	500	-	14,000
0111	W. E. COMBS TAPP PROGRAM	-	400	-	-	500	-	-
0121	RUCKEL MIDDLE	12	400	4,800	-	500	-	4,800
0131	DESTIN ELEMENTARY	35	400	14,000	-	500	-	14,000
0151	EDGE ELEMENTARY	4	400	1,600	-	500	-	1,600
0161	EGLIN ELEMENTARY	23	400	9,200	-	500	-	9,200
0201	LAUREL HILL SCHOOL	16	400	6,400	-	500	-	6,400
0211	NICEVILLE HIGH	-	400	-	-	500	-	-
0222	NORTHWOOD ELEMENTARY	30	400	12,000	-	500	-	12,000
0251	SOUTHSIDE ELEMENTARY	22	400	8,800	-	500	-	8,800
0261	VALPARAISO ELEMENTARY	12	400	4,800	-	500	-	4,800
0271	PRYOR MIDDLE	23	400	9,200	-	500	-	9,200
0281	WRIGHT ELEMENTARY	25	400	10,000	-	500	-	10,000
0431	SHALIMAR MIDDLE	16	400	6,400	-	500	-	6,400
0541	ELLIOTT PT. ELEMENTARY	34	400	13,600	-	500	-	13,600
0551	OCEAN CITY ELEMENTARY	38	400	15,200	-	500	-	15,200
0561	MARY ESTHER ELEMENTARY	33	400	13,200	-	500	-	13,200
0571	PLEW ELEMENTARY	9	400	3,600	-	500	-	3,600
0581	CHOCTAW HIGH	-	400	-	-	500	-	-
0582	CHOCTAW ACADEMY	-	400	-	-	500	-	-
0601	CRESTVIEW HIGH	-	400	-	-	500	-	-
0621	KENWOOD ELEMENTARY	25	400	10,000	-	500	-	10,000
0631	FLOROSA ELEMENTARY	18	400	7,200	-	500	-	7,200
0641	FT. WALTON BEACH HIGH	-	400	-	-	500	-	-
0642	FWB SUCCESS ACADEMY	-	400	-	-	500	-	-
0651	BRUNER MIDDLE	42	400	16,800	-	500	-	16,800
0671	LEWIS MIDDLE	16	400	6,400	-	500	-	6,400
0681	LONGWOOD ELEMENTARY	19	400	7,600	-	500	-	7,600
0701	OATC	-	400	-	-	500	-	-
0731	WALKER ELEMENTARY	24	400	9,600	-	500	-	9,600
0741	BLUEWATER ELEMENTARY	5	400	2,000	-	500	-	2,000
0751	ANTIOCH ELEMENTARY	23	400	9,200	-	500	-	9,200
0761	DAVIDSON MIDDLE	10	400	4,000	-	500	-	4,000
0771	DESTIN MIDDLE	4	400	1,600	-	500	-	1,600
0781	ECCI - SOUTH	14	400	5,600	-	500	-	5,600
0791	ECCI - NORTH	8	400	3,200	-	500	-	3,200
9810	GULF COAST YOUTH ACAD.	19	400	7,600	-	500	-	7,600
9811	OKAL. YOUTH DEVELOP.	8	400	3,200	-	500	-	3,200
9812	OKAL. YOUTH ACADEMY	8	400	3,200	-	500	-	3,200
9813	OKAL. REG. DETENTION	-	400	-	-	500	-	-
9814	ADOL. SUB. ABUSE PROG.	12	400	4,800	-	500	-	4,800
9817	MILTON GIRLS JUV. RES.	9	400	3,600	-	500	-	3,600
TOTAL		740		\$ 296,000	-		\$ -	\$ 296,000

NOTE:  
 THERE IS NO HIGH SCHOOL ALLOCATION IN NOVEMBER.

**Okaloosa County School District**  
**Plan of Care – Project #6113**  
**Instructions for Submitting Payroll**  
**Fiscal Year 2007-2008**

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 2007 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) The OASIS system must be used to hire the individual.
- 2) 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 to the Human Resources Department hiring the individual as a temporary tutor. This form is generated by OASIS. The account strip to be charged is (1010, 5100, 0750, your cost center, 6113).
- 3) 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  
FINANCE DEPARTMENT  
**OTHER COMPENSATION REPORT**

MIS 3180  
Rev. 9/03

Activity Date: \_\_\_\_\_ Description: \_\_\_\_\_  
\_\_\_\_\_

Funding:

\_\_\_\_\_  
Fund                          Function                          Object                          Center                          Project

**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	_____

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 Foye 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:

*Sheik J. Wilson*  
Signature

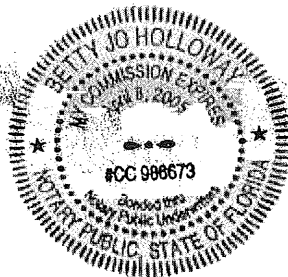
7-24-2002  
Date

*Marshall E. Furbush* 7/24/02  
Signature

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

*Betty J. 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 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. *should*

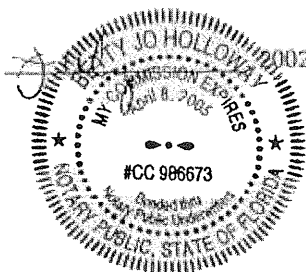
Resignation: If a teacher wishes to resign from their tutoring assignment, they may do so with two (2) weeks notice to the principal. The teacher shall suffer no penalty or recrimination as long as adequate notice is given. The principal shall make efforts to fill the position before the full two (2)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

For OCEA:  
Philip J. Olsen 7-24-2002  
Signature Date

For the School Board:  
Michael E. Fowley 7/24/02  
Signature Date

Sworn to and subscribed before me this 24th day of

Betty Jo Holloway Seal:  
Notary Signature



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 Spence

1.14.99  
Date



Betty Jo Holloway  
My Commission CC636783  
Expires April 08, 2001

Betty Jo Holloway  
1/14/99