



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

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FINANCE TAM: 2008-033

CONTACT: Julie Perry, Accountant  
Budgeting & Financial Services

TELEPHONE: 833-5850

TO: School Principals  
FROM: Debbie Bruce, Director – Budgeting & Financial Services  
DATE: January 24, 2008  
SUBJECT: Plan of Care – January Allocation – Project 6113  
Fiscal Year 2007-2008

A handwritten signature in blue ink, appearing to read "Debbie Bruce", is written over the "FROM" line.

Information Systems has provided the number of students eligible for Plan of Care as of January 16, 2008. Please find attached two spreadsheets: (1) *"Plan of Care January Allocation – Summary,"* and (2) *"Plan of Care January Allocation – Detail."* The *"Plan of Care January Allocation – Summary"* spreadsheet includes each school's number of active and eligible students, allocation per student, and total POC allocation. The *"Plan of Care January Allocation – Detail"* spreadsheet provides each student's grade, name, referral date, and the amount of the January 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 receive \$500 for each active and eligible POC student.
3. There will be no "back pay" of funds for students not entered on Panel S707 before January 16, 2008.
4. This is the final POC allocation for fiscal year 2007-2008.
5. 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, there will be no more adjustments for the remainder of the fiscal year.
6. Attached are payroll forms and instructions to facilitate each school in submitting compensation for teachers and tutors participating in the POC program.
7. 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 JANUARY ALLOCATION - SUMMARY  
 DATA AS OF JANUARY 16, 2008 - PROVIDED BY INFORMATION SYSTEMS  
 FISCAL YEAR 2007-2008  
 JANUARY 24, 2008

CENTER	SCHOOL	ELEMENTARY & MIDDLE			HIGH SCHOOL			TOTAL JANUARY ALLOCATION
		NO. OF STUDENTS	ALLOCATION PER STUDENT	POC JANUARY ALLOCATION	NO. OF STUDENTS	ALLOCATION PER STUDENT	POC JANUARY ALLOCATION	
0031	EDWINS ELEMENTARY	19	\$ 400	\$ 7,600	-	\$ 500	\$ -	\$ 7,600
0041	BAKER SCHOOL	41	400	16,400	35	500	17,500	33,900
0051	BOB SIKES ELEMENTARY	37	400	14,800	-	500	-	14,800
0082	MEIGS MIDDLE	11	400	4,400	-	500	-	4,400
0092	RICHBOURG MIDDLE	34	400	13,600	-	500	-	13,600
0111	W. E. COMBS TAPP PROGRAM	-	400	-	5	500	2,500	2,500
0121	RUCKEL MIDDLE	14	400	5,600	-	500	-	5,600
0131	DESTIN ELEMENTARY	36	400	14,400	-	500	-	14,400
0151	EDGE ELEMENTARY	4	400	1,600	-	500	-	1,600
0161	EGLIN ELEMENTARY	22	400	8,800	-	500	-	8,800
0201	LAUREL HILL SCHOOL	16	400	6,400	12	500	6,000	12,400
0211	NICEVILLE HIGH	-	400	-	104	500	52,000	52,000
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	21	400	8,400	-	500	-	8,400
0281	WRIGHT ELEMENTARY	25	400	10,000	-	500	-	10,000
0431	SHALIMAR MIDDLE	14	400	5,600	-	500	-	5,600
0541	ELLIOTT PT. ELEMENTARY	36	400	14,400	-	500	-	14,400
0551	OCEAN CITY ELEMENTARY	37	400	14,800	-	500	-	14,800
0561	MARY ESTHER ELEMENTARY	32	400	12,800	-	500	-	12,800
0571	PLEW ELEMENTARY	8	400	3,200	-	500	-	3,200
0581	CHOCTAW HIGH	-	400	-	89	500	44,500	44,500
0582	CHOCTAW ACADEMY	-	400	-	22	500	11,000	11,000
0601	CRESTVIEW HIGH	-	400	-	124	500	62,000	62,000
0621	KENWOOD ELEMENTARY	25	400	10,000	-	500	-	10,000
0631	FLOROSA ELEMENTARY	20	400	8,000	-	500	-	8,000
0641	FT. WALTON BEACH HIGH	-	400	-	111	500	55,500	55,500
0642	FWB SUCCESS ACADEMY	-	400	-	4	500	2,000	2,000
0651	BRUNER MIDDLE	40	400	16,000	-	500	-	16,000
0671	LEWIS MIDDLE	16	400	6,400	-	500	-	6,400
0681	LONGWOOD ELEMENTARY	17	400	6,800	-	500	-	6,800
0701	OATC	-	400	-	37	500	18,500	18,500
0731	WALKER ELEMENTARY	23	400	9,200	-	500	-	9,200
0741	BLUEWATER ELEMENTARY	6	400	2,400	-	500	-	2,400
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	15	400	6,000	8	500	4,000	10,000
0791	ECCI - NORTH	6	400	2,400	-	500	-	2,400
9810	GULF COAST YOUTH ACAD.	19	400	7,600	13	500	6,500	14,100
9811	OKAL. YOUTH DEVELOP.	13	400	5,200	5	500	2,500	7,700
9812	OKAL. YOUTH ACADEMY	8	400	3,200	5	500	2,500	5,700
9813	OKAL. REG. DETENTION	3	400	1,200	1	500	500	1,700
9814	ADOL. SUB. ABUSE PROG.	8	400	3,200	6	500	3,000	6,200
9817	MILTON GIRLS JUV. RES.	5	400	2,000	3	500	1,500	3,500
9819	TEACHING ADJUD. YOUTH	-	400	-	1	500	500	500
TOTAL		732		\$ 292,800	585		\$ 292,500	\$ 585,300

**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
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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	_____

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

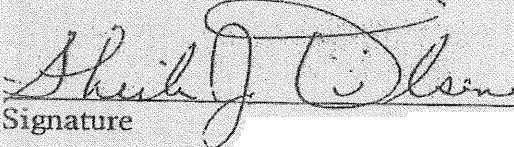
The Okaloosa County Education Association and the Okaloosa County School District agree to the following arrangements for teachers to meet with parents of retained students:

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.

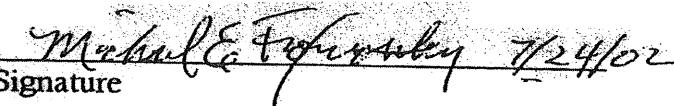
2. If the meeting occurs out of the 7.5 hour day, teachers will be compensated \$25.00 per hour for each meeting. They will be guaranteed a minimum of two (2) hours per student. No compensation will be given for hours beyond two (2) hours.
- 3 Teachers may request, on an individual meeting basis, the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

For OCEA:

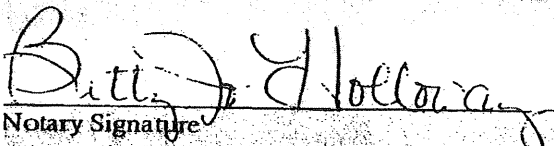
For the School Board:

  
Signature

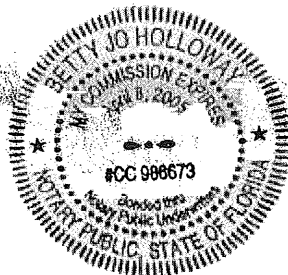
7-24-2002  
Date

  
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. *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

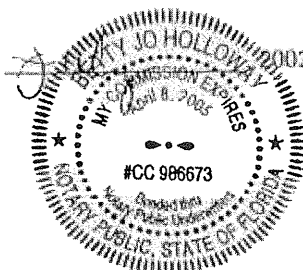
For the School Board:

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