



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

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FINANCE TAM: 2010-009

CONTACT: Julie Perry, Specialist  
Budgeting & Financial Services

TELEPHONE: 833-5850

TO: School Principals

FROM: Rita R. Scallan, Chief Financial Officer

DATE: September 22, 2009

SUBJECT: Plan of Care (POC) Allocation – Project 6113

The Plan of Care (POC) allocation method has been revised for fiscal year 2009-2010. The new formula consists of two parts: a base allocation for all schools and an additional allocation based on need. Funds are to be used strictly for before and after school tutoring. Requests should not be made for teacher salaries, classroom assistant salaries, or other assistance offered during the school day. All funds must be expended or encumbered by April 30, 2009. Any remaining funds will be pulled back to the District.

Schools will determine which students would best be served through tutoring. This may include retained students, good-cause students, or students needing subject area support. Payroll forms and instructions to facilitate submitting compensation for teachers and tutors participating in the POC program are attached. Teacher compensation forms must be accompanied by attendance rosters with names of students who attended the tutoring sessions. Also included are copies of Memorandums of Agreement between the School District and OCEA outlining the rules and processes to be used relating to personnel.

Transportation will be provided depending on ridership. The District will pay transportation costs for buses with at least 15 students. Bus drivers are expected to maintain a daily log. If transportation drops below 15 on a bus, the school has the option of paying 50% of the cost or eliminating the transportation. If a school chooses to pay 50% of the transportation cost, this expenditure must be funded from a source other than Plan of Care – Project 6113.

The attached spreadsheet shows the allocation method and allocation per school. Each section of the spreadsheet is explained below:

FCAT

Information Systems provided the number of current students who scored a Level 1 or Level 2 in FCAT Math or Reading. (Columns B – F)

Non-Proficient

The percentage of current students who are considered proficient was provided by Information Systems. This percentage was subtracted from 100% to obtain the non-proficient percentage for Math and Reading. The percentage was applied to the adjusted projected UFTE for fiscal year 2009-2010 to obtain an estimated number of students considered non-proficient. (Columns G – K)

Weighted Non-Proficient Based on Corrective Action Category

Finance used the corrective action category data to weight the number of students considered non-proficient. (Multi-Column L)

Allocation Distribution

The total allocation for the District is \$400,000. Each school received a base allocation of \$5,000, with very small schools receiving a half or quarter of the base. These schools are noted at the bottom of the spreadsheet. The remaining funds were distributed based on the total number of FCAT Level 1 and 2 students and weighted non-proficient students. The "Total POC Allocation Per School" is indicated in Column P. (Columns M – P)

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
4. Student Data – J.C. Connor or Wendy Meserve, Information Systems, at 689-7149

Attachments:

- Spreadsheet
- Payroll forms and instructions
- Copies of Memorandums of Agreement

cc: Executive Staff  
OCEA  
School Budget Bookkeepers

SCHOOL DISTRICT OF OKALOOSA COUNTY  
 PLAN OF CARE ALLOCATION - PROJECT 6113  
 BASE ALLOCATION PER SCHOOL, FCAT LEVELS 1 & 2, AND ESTIMATED NON-PROFICIENT WITH WEIGHTING BASED ON CORRECTIVE ACTION CATEGORY  
 FISCAL YEAR 2009-2010  
 SEPTEMBER 21, 2009

TOTAL ALLOCATION \$ 400,000

CENTER	SCHOOL NAME	FY 2009-2010 ADJ. PROJ. UFTE A	FCAT					NON-PROFICIENT					WEIGHTED NON-PROFICIENT BASED ON CORRECTIVE ACTION CATEGORY					TOTAL FCAT & WEIGHTED NON-PROFICIENT M = (F + L)	\$5,000 BASE POC PER SCHOOL N	\$215,000 ALLOC. PER UNIT \$ 7.68 O = (M X ALLOC.)	TOTAL POC FUNDING PER SCHOOL P = (N + O)	
			LEVEL 1		LEVEL 2		TOTAL NO. OF STUDENTS F = SUM(B:E)	PERCENTAGE		ESTIMATED NO. OF STUDENTS			N/A		PREVENT I	PREVENT II	CORRECT I					CORRECT II
			MATH	READING	MATH	READING		MATH	READING	TOTAL	1.00	1.50										
			G	H	I = (G X A)	J = (H X A)		K = (I + J)	L = ESTIMATED NON-PROFICIENT (K) X CORRECTIVE ACTION CATEGORY FACTOR													
0031	EDWINS ELEMENTARY SCHOOL	448.00	10.00	12.00	16.00	14.00	52.00	24.07%	24.07%	107.85	107.85	215.70				323.55			375.55	\$ 5,000	\$ 2,886	\$ 7,886
0041	BAKER SCHOOL	1,333.04	53.00	62.00	141.00	158.00	414.00	24.94%	28.26%	332.40	376.77	709.17				1,063.76			1,477.76	5,000	11,356	16,356
0051	BOB SIKES ELEMENTARY SCHOOL	707.00	18.00	16.00	20.00	14.00	68.00	18.27%	14.42%	129.16	101.97	231.13				346.70			414.70	5,000	3,187	8,187
0082	MEIGS MIDDLE SCHOOL	613.00	45.00	22.00	101.00	65.00	233.00	25.75%	15.70%	157.84	96.22	254.06	254.06						487.06	5,000	3,743	8,743
0092	SHOAL RIVER MIDDLE SCHOOL	694.00	66.00	35.00	138.00	80.00	319.00	27.13%	15.71%	188.27	109.04	297.31				668.95			987.95	5,000	7,592	12,592
0121	RUCKEL MIDDLE SCHOOL	860.00	24.00	18.00	97.00	49.00	188.00	15.84%	8.89%	136.20	76.44	212.64	212.64						400.64	5,000	3,079	8,079
0131	DESTIN ELEMENTARY SCHOOL	795.00	6.00	8.00	7.00	14.00	35.00	5.33%	10.37%	42.36	82.47	124.83	124.83						159.83	5,000	1,228	6,228
0151	EDGE ELEMENTARY SCHOOL	513.37	2.00	7.00	9.00	9.00	27.00	7.38%	10.74%	37.90	55.13	93.03	93.03						120.03	5,000	922	5,922
0161	EGLIN ELEMENTARY SCHOOL	492.00	-	2.00	1.00	2.00	5.00	2.33%	9.30%	11.44	45.77	57.21	57.21						62.21	5,000	478	5,478
0201	LAUREL HILL SCHOOL	410.00	24.00	28.00	63.00	46.00	161.00	34.39%	30.08%	140.99	123.32	264.31				594.70			755.70	5,000	5,807	10,807
0211	NICEVILLE HIGH SCHOOL	1,975.30	22.00	101.00	103.00	325.00	551.00	9.58%	32.49%	189.20	641.75	830.95				1,869.64			2,420.64	5,000	18,601	23,601
0222	NORTHWOOD ELEMENTARY SCHOOL	694.00	7.00	15.00	25.00	11.00	58.00	17.11%	13.90%	118.76	96.49	215.25	215.25						273.25	5,000	2,100	7,100
0241	SILVER SANDS SCHOOL	133.00	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A				X		N/A	2,500	-	2,500
0251	RIVERSIDE ELEMENTARY SCHOOL	576.00	5.00	12.00	18.00	8.00	43.00	14.29%	12.42%	82.29	71.55	153.84	153.84						196.84	5,000	1,513	6,513
0261	VALPARAISO ELEMENTARY SCHOOL	450.00	1.00	4.00	6.00	13.00	24.00	6.25%	15.18%	28.13	68.30	96.43	96.43						120.43	5,000	925	5,925
0271	PRYOR MIDDLE SCHOOL	572.00	54.00	44.00	136.00	79.00	313.00	36.75%	24.81%	210.21	141.89	352.10				792.23			1,105.23	5,000	8,493	13,493
0281	WRIGHT ELEMENTARY SCHOOL	636.00	16.00	22.00	47.00	28.00	113.00	34.62%	27.47%	220.15	174.73	394.88				888.48			1,001.48	5,000	7,696	12,696
0431	SHALIMAR ELEMENTARY SCHOOL	545.00	10.00	18.00	25.00	19.00	72.00	20.47%	22.81%	111.55	124.30	235.85				353.78			425.78	5,000	3,272	8,272
0541	ELLIOTT PT. ELEMENTARY SCHOOL	563.00	8.00	16.00	24.00	24.00	72.00	18.60%	23.26%	104.74	130.93	235.67	235.67						307.67	5,000	2,364	7,364
0561	MARY ESTHER ELEMENTARY SCHOOL	540.00	9.00	14.00	16.00	14.00	53.00	18.38%	21.32%	99.26	115.15	214.41				482.42			535.42	5,000	4,114	9,114
0571	PLEW ELEMENTARY SCHOOL	591.06	3.00	4.00	11.00	11.00	29.00	7.53%	8.06%	44.49	47.67	92.16	92.16						121.16	5,000	931	5,931
0581	CHOCTAW HIGH SCHOOL	1,675.00	50.00	144.00	194.00	360.00	748.00	20.22%	41.53%	338.61	695.69	1,034.30				2,327.18			3,075.18	5,000	23,631	28,631
0601	CRESTVIEW HIGH SCHOOL	1,950.00	74.00	220.00	206.00	385.00	885.00	20.59%	43.60%	401.47	850.11	1,251.58				3,441.85			4,326.85	5,000	33,248	38,248
0621	KENWOOD ELEMENTARY SCHOOL	570.00	6.00	11.00	18.00	16.00	51.00	17.02%	19.15%	97.02	109.15	206.17	206.17						257.17	5,000	1,976	6,976
0631	FLOROSA ELEMENTARY SCHOOL	598.00	6.00	12.00	15.00	22.00	55.00	15.33%	25.55%	91.66	152.77	244.43				366.65			421.65	5,000	3,240	8,240
0641	FT. WALTON BEACH HIGH SCHOOL	1,836.00	56.00	155.00	146.00	376.00	733.00	15.17%	39.12%	278.43	718.26	996.69				2,242.55			2,975.55	5,000	22,865	27,865
0651	BRUNER MIDDLE SCHOOL	837.00	79.00	54.00	185.00	118.00	436.00	34.65%	23.26%	289.98	194.68	484.66				726.99			1,162.99	5,000	8,937	13,937
0671	LEWIS MIDDLE SCHOOL	521.00	23.00	26.00	63.00	40.00	152.00	20.53%	16.27%	106.94	84.76	191.70	191.70						343.70	5,000	2,641	7,641
0681	LONGWOOD ELEMENTARY SCHOOL	530.00	10.00	15.00	17.00	14.00	56.00	17.42%	19.35%	92.32	102.58	194.90				292.35			348.35	5,000	2,677	7,677
0701	OATC	210.00	22.00	38.00	28.00	18.00	106.00	64.94%	73.12%	136.36	153.55	289.91	289.91						395.91	5,000	3,042	8,042
0731	WALKER ELEMENTARY SCHOOL	732.00	12.00	14.00	28.00	29.00	83.00	18.60%	20.47%	136.19	149.80	285.99				428.99			511.99	5,000	3,934	8,934
0741	BLUEWATER ELEMENTARY SCHOOL	650.00	1.00	3.00	10.00	4.00	18.00	6.18%	3.93%	40.17	25.56	65.73	65.73						83.73	5,000	643	5,643
0751	ANTIOCH ELEMENTARY SCHOOL	810.00	3.00	7.00	10.00	15.00	35.00	5.12%	9.84%	41.46	79.72	121.18	121.18						156.18	5,000	1,200	6,200
0761	DAVIDSON MIDDLE SCHOOL	875.00	88.00	49.00	157.00	98.00	392.00	32.15%	19.42%	281.33	169.95	451.28				676.92			1,068.92	5,000	8,214	13,214
0771	DESTIN MIDDLE SCHOOL	613.00	11.00	9.00	63.00	35.00	118.00	13.19%	7.83%	80.86	47.99	128.85	128.85						246.85	5,000	1,897	6,897
0811	SILVER SANDS - NORTH	27.00	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A				X		N/A	-	-	-
TOTAL DISTRICT SCHOOLS		26,574.77	824.00	1,217.00	2,144.00	2,513.00	6,698.00			4,905.99	6,322.31	11,228.30	2,538.66	4,579.69	-	9,866.15	3,441.85		27,124.35	\$ 172,500	\$ 208,432	\$ 380,932
0781	ECCI - SOUTH	107.00	39.00	26.00	22.00	30.00	117.00	61.00%	57.69%	65.27	61.73	127.00				190.50			N/A	-	-	-
0791	ECCI - NORTH	59.00	14.00	17.00	16.00	17.00	64.00	62.50%	70.83%	36.88	41.79	78.67				118.01			N/A	-	-	-
9818	NWFL BALLET ACADEMIE	116.00	1.00	1.00	5.00	4.00	11.00	6.38%	5.32%	7.40	6.17	13.57	13.57						24.57	2,500	189	2,689
9819	TEACHING ADJ. YOUTH FAC.	14.25	3.00	2.00	-	2.00	7.00	100.00%	100.00%	14.25	14.25	28.50	28.50						N/A	-	-	-
9820	OKALOOSA BLENDED	59.50	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A						N/A	-	-	-
TOTAL DISTRICT PROGRAMS		355.75	57.00	46.00	43.00	53.00	199.00			123.80	123.94	247.74	42.07	308.51	-	-	-	-	24.57	\$ 2,500	\$ 189	\$ 2,689
9810	GULF COAST YOUTH ACD	115.96	15.00	12.00	5.00	10.00	42.00	71.43%	73.33%	82.83	85.04	167.87	167.87						209.87	2,500	1,613	4,113
9811	OKALOOSA YOUTH DEVELOP. CNTR.	57.09	6.00	4.00	1.00	2.00	13.00	87.50%	75.00%	49.95	42.82	92.77	92.77						105.77	1,250	813	2,063
9812	OKALOOSA YOUTH ACD	120.80	14.00	13.00	7.00	6.00	40.00	87.50%	76.00%	105.70	91.81	197.51	197.51						237.51	2,500	1,825	4,325
9813	OKALOOSA REG. DETENTION	44.64	2.00	2.00	1.00	2.00	7.00	75.00%	80.00%	33.48	35.71	69.19	69.19						76.19	1,250	585	1,835
9814	ADOL. SUBST. ABUSE PGM	46.48	3.00	3.00	-	1.00	7.00	50.00%	83.33%	23.24	38.73	61.97	61.97						68.97	1,250	530	1,780
9817	MILTON GIRLS JUV. RES. FAC.	65.23	17.00	8.00	2.00	1.00	28.00	86.36%	72.73%	56.34	47.44	103.78	103.78						131.78	1,250	1,013	2,263
TOTAL DIJ PROGRAMS		450.20	57.00	42.00	16.00	22.00	137.00			351.54	341.55	693.09	693.09	-	-	-	-	-	830.09	\$ 10,000	\$ 6,379	\$ 16,379
TOTAL		27,380.72	938.00	1,305.00	2,203.00	2,588.00	7,034.00			5,381.33	6,787.80	12,169.13	3,273.82	4,888.20	-	9,866.15	3,441.85		27,979.01	\$ 185,000	\$ 215,000	\$ 400,000

- NOTES:
1. PER INFORMATION SYSTEMS, SILVER SANDS CORRECTIVE ACTION CATEGORY IS BEING APPEALED.
  2. THE FOLLOWING SCHOOLS WILL RECEIVE ONE-HALF BASE ALLOCATION: SILVER SANDS SCHOOL, NWFL BALLET ACADEMIE, GULF COAST YOUTH ACADEMY, AND OKALOOSA YOUTH ACADEMY.
  3. THE FOLLOWING SCHOOLS WILL RECEIVE ONE-QUARTER BASE ALLOCATION: OKALOOSA YOUTH DEVELOPMENT CENTER, OKALOOSA REGIONAL DETENTION CENTER, ADOLESCENT SUBSTANCE ABUSE PROGRAM, AND MILTON GIRLS JUVENILE RESIDENTIAL FACILITY.

**School District of Okaloosa County**  
**Plan of Care – Project 6113**  
**Instructions for Submitting Payroll**  
**Fiscal Year 2009-2010**

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

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

**A) Current District employees who tutor before and/or after school (including substitutes/temporary personnel):**

- 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(s) of tutoring session, teachers' names, social security numbers (last 4 digits only), and job IDs.
- 3) Refer to the Memorandum of Agreement (see attachment) 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.Center.6113).

**B) New Hire:**

- 1) The individual must complete the necessary paperwork through OASIS to become a District substitute. The Principal does not enter the job on OASIS.
- 2) Once the individual is a District substitute, follow the instructions in Item A.

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

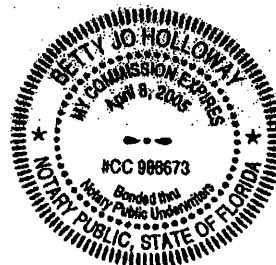
For the School Board:

Marlene T. Gandy 8/07/02  
Signature Date

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

Betty Jo Holloway  
Notary Signature

Seal:



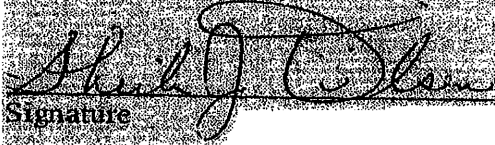
Memorandum of Agreement  
between  
Okaloosa County School Board  
and  
Okaloosa County Education Association

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.

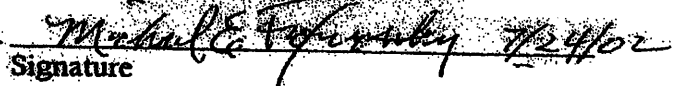
2. If the meeting occurs out of the 7.5 hour day, teachers will be compensated \$25.00 per hour for each meeting. They will be guaranteed a minimum of two (2) hours per student. No compensation will be given for hours beyond two (2) hours.
- 3 Teachers may request, on an individual meeting basis, the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

For OCEA:

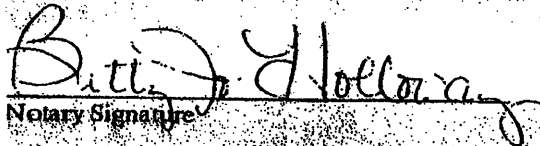
  
Signature

7-24-2002  
Date

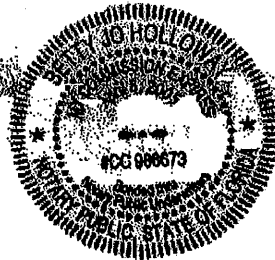
For the School Board:

  
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:

Shirley J. Wilson 7-24-2002  
Signature Date

For the School Board:

Michael E. Forsythe 7/24/02  
Signature Date

Sworn to and subscribed before me this 24th day of

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 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 06, 2001

Betty Jo Holloway  
1/14/99