



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

FINANCE TAM: 2014-010
CONTACT: Julie Perry, Director
Budgeting & Financial Services
TELEPHONE: 833-5850

TO: School Principals
FROM: Rita R. Scallan, Chief Financial Officer
DATE: August 23, 2013
SUBJECT: Plan of Care (POC) Allocation – Project 6113

The Plan of Care (POC) allocation method consists of three components:

1. Allocation based on FCAT levels and failed Algebra I End of Course exams,
2. Base allocation, and
3. Secondary tutoring allocation for Course Recovery and/or End of Course exam support.

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. 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. Any remaining funds will be pulled back to the District.

The attached spreadsheet shows the allocation method and allocation per school. Each type of allocation and the corresponding sections of the spreadsheet are explained below:

Allocation Based On FCAT Levels and Failed Algebra I EOC Exams

FCAT & Failed EOC

Information Systems provided the number of current students who scored a Level 1 or Level 2 in FCAT Math or Reading (Columns A – D) and the number of current students who failed an Algebra I End of Course exam (Column E). The total number of students is shown in Column F.

Allocation Calculation

The total FCAT and Failed EOC students were multiplied by \$15.95 to obtain the allocation based on need. (Column G)

Base Allocation

Allocation Calculation

Each school received a base allocation of \$2,500, with very small schools receiving a half or quarter of the base. These schools are noted at the bottom of the spreadsheet. (Column H)

Secondary State End of Course Exam Tutoring Allocation

Allocation Calculation

Each high school, middle school, or K-8/K-12 school received funding to support eight (8) hours of secondary core subject area tutoring per week for 31 weeks. (8 hours X 31 weeks X \$37/hour = \$9,176) These funds are to be used for course recovery and/or tutoring students enrolled in a State EOC course (Algebra I, Geometry, Biology I, US History, or Civics) to allow for successful passing of the exams the first time administered. (Column I)

The "Total Allocation" per school is shown in Column J.

Tutoring Deadlines

All funds must be expended or encumbered by May 31, 2014; therefore, tutoring should be concluded according to the following schedule:

<u>School Level</u>	<u>Last Day for Tutoring</u>
Elementary	Friday, April 18
Middle	Friday, May 9
High	Friday, May 9

Middle and high schools have received an extended tutoring time due to End of Course exams.

Payroll Procedures

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. **Other Compensation forms should be turned in each month according to the payroll schedule.** 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

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, and schools should be aware of how many students are being transported per bus. **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 Budgeting Department will increase the Plan of Care budget to cover transportation expenditures that meet the above requirements.

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 – Marcus Chambers at 833-3191
4. Student Data – Wendy Meserve at 689-7149
5. Transportation – Jay McInnis at 833-3551

Attachments:

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

cc: Executive Staff
Payroll Supervisor
Assistant Superintendent - Curriculum
Director – MIS & Instructional Technology

Transportation Program Director
OCEA
School Budget Bookkeepers

SCHOOL DISTRICT OF OKALOOSA COUNTY
PLAN OF CARE ALLOCATION - PROJECT 6113
FCAT LEVELS 1 AND 2 (MATH & READING), ALGEBRA I EOC FAILURES; BASE ALLOCATION; AND SECONDARY SPECIFIC SUBJECT AREA TUTORING
FISCAL YEAR 2013-2014
AUGUST 22, 2013

CENTER	SCHOOL NAME	FCAT				E FAILED END OF COURSE ALGEBRA I (INCL. HONORS)	F TOTAL STUDENTS FCAT & EOC FAILURES SUM(A:E)	G		H		I SECONDARY TUTORING \$ 9,176 (INCL. HONORS)	J TOTAL PLAN OF CARE FUNDING PER SCHOOL (G + H + I)
		LEVEL 1		LEVEL 2				POC ALLOCATION PER UNIT \$ 15.95 (F X ALLOC.)	BASE POC PER SCHOOL \$ 2,500	SECONDARY TUTORING \$ 9,176 (INCL. HONORS)	TOTAL PLAN OF CARE FUNDING PER SCHOOL (G + H + I)		
		MATH K-12	READING K-12	MATH K-12	READING K-12								
0031	EDWINS ELEMENTARY SCHOOL	35.00	26.00	45.00	51.00	-	157.00	\$ 2,504	\$ 2,500	\$ -	\$ 5,004		
0041	BAKER SCHOOL	94.00	103.00	175.00	253.00	31.00	656.00	10,464	2,500	9,176	22,140		
0051	BOB SIKES ELEMENTARY SCHOOL	50.00	37.00	119.00	108.00	-	314.00	5,009	2,500	-	7,509		
0082	MEIGS MIDDLE SCHOOL	60.00	46.00	117.00	112.00	1.00	336.00	5,360	2,500	9,176	17,036		
0092	SHOAL RIVER MIDDLE SCHOOL	128.00	83.00	206.00	213.00	1.00	631.00	10,065	2,500	9,176	21,741		
0121	RUCKEL MIDDLE SCHOOL	24.00	27.00	119.00	133.00	-	303.00	4,833	2,500	9,176	16,509		
0131	DESTIN ELEMENTARY SCHOOL	25.00	23.00	75.00	61.00	-	184.00	2,935	2,500	-	5,435		
0151	EDGE ELEMENTARY SCHOOL	19.00	13.00	50.00	54.00	-	136.00	2,169	2,500	-	4,669		
0161	EGLIN ELEMENTARY SCHOOL	24.00	10.00	34.00	26.00	-	94.00	1,499	2,500	-	3,999		
0201	LAUREL HILL SCHOOL	51.00	65.00	56.00	96.00	23.00	291.00	4,642	2,500	9,176	16,318		
0211	NICEVILLE HIGH SCHOOL	1.00	63.00	5.00	205.00	62.00	336.00	5,360	2,500	9,176	17,036		
0222	NORTHWOOD ELEMENTARY SCHOOL	54.00	36.00	68.00	79.00	-	237.00	3,780	2,500	-	6,280		
0241	SILVER SANDS SCHOOL	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	N/A		
0251	RIVERSIDE ELEMENTARY SCHOOL	61.00	53.00	133.00	103.00	-	350.00	5,583	2,500	-	8,083		
0271	PRYOR MIDDLE SCHOOL	78.00	64.00	143.00	168.00	-	453.00	7,226	2,500	9,176	18,902		
0281	WRIGHT ELEMENTARY SCHOOL	87.00	45.00	83.00	87.00	-	302.00	4,817	2,500	-	7,317		
0431	SHALIMAR ELEMENTARY SCHOOL	27.00	22.00	72.00	65.00	-	186.00	2,967	2,500	-	5,467		
0541	ELLIOTT PT. ELEMENTARY SCHOOL	48.00	32.00	63.00	65.00	-	208.00	3,318	2,500	-	5,818		
0561	MARY ESTHER ELEMENTARY SCHOOL	41.00	32.00	78.00	69.00	-	220.00	3,509	2,500	-	6,009		
0571	PLEW ELEMENTARY SCHOOL	25.00	17.00	69.00	66.00	-	177.00	2,823	2,500	-	5,323		
0581	CHOCTAW HIGH SCHOOL	9.00	82.00	7.00	272.00	115.00	485.00	7,736	2,500	9,176	19,412		
0601	CRESTVIEW HIGH SCHOOL	7.00	158.00	19.00	362.00	212.00	758.00	12,091	2,500	9,176	23,767		
0621	KENWOOD ELEMENTARY SCHOOL	32.00	21.00	69.00	73.00	-	195.00	3,111	2,500	-	5,611		
0631	FLOROSA ELEMENTARY SCHOOL	25.00	25.00	53.00	53.00	-	156.00	2,488	2,500	-	4,988		
0641	FT. WALTON BEACH HIGH SCHOOL	6.00	117.00	10.00	293.00	116.00	542.00	8,646	2,500	9,176	20,322		
0651	BRUNER MIDDLE SCHOOL	144.00	88.00	187.00	208.00	1.00	628.00	10,018	2,500	9,176	21,694		
0671	LEWIS K-8 SCHOOL	56.00	53.00	102.00	116.00	-	327.00	5,216	2,500	9,176	16,892		
0681	LONGWOOD ELEMENTARY SCHOOL	66.00	42.00	78.00	75.00	-	261.00	4,163	2,500	-	6,663		
0701	CHOICE HIGH & VOCATIONAL CENTER	36.00	100.00	21.00	83.00	37.00	277.00	4,419	2,500	9,176	16,095		
0731	WALKER ELEMENTARY SCHOOL	62.00	46.00	89.00	81.00	-	278.00	4,435	2,500	-	6,935		
0741	BLUEWATER ELEMENTARY SCHOOL	13.00	10.00	67.00	41.00	-	131.00	2,090	2,500	-	4,590		
0751	ANTIOCH ELEMENTARY SCHOOL	20.00	22.00	73.00	69.00	-	184.00	2,935	2,500	-	5,435		
0761	DAVIDSON MIDDLE SCHOOL	109.00	83.00	195.00	199.00	-	586.00	9,348	2,500	9,176	21,024		
0771	DESTIN MIDDLE SCHOOL	35.00	32.00	121.00	118.00	-	306.00	4,881	2,500	9,176	16,557		
0801	RICHBOURG SCHOOL	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	N/A		
TOTAL DISTRICT SCHOOLS		1,552.00	1,676.00	2,801.00	4,057.00	599.00	10,685.00	170,440	82,500	137,640	390,580		
0721	OKALOOSA STEM ACADEMY	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	N/A		
0791	ECCI - NORTH & BEST CHANCE - NORTH	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	N/A		
0811	SOUTHSIDE PRE-K D	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	N/A		
9818	NWFL BALLET ACADEMIE	10.00	2.00	30.00	19.00	-	61.00	973	1,250	-	2,223		
9819	TEACHING ADJ. YOUTH FAC.	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	N/A		
TOTAL DISTRICT PROGRAMS		10.00	200.00%	30.00	19.00	-	61.00	973	1,250	-	2,223		
9810	GULF COAST YOUTH ACD	23.00	37.00	5.00	13.00	-	78.00	1,244	1,250	-	2,494		
9811	OKALOOSA YOUTH DEVELOP. CNTR.	17.00	32.00	1.00	4.00	-	54.00	861	625	-	1,486		
9812	OKALOOSA YOUTH ACD	14.00	31.00	6.00	13.00	6.00	70.00	1,117	1,250	-	2,367		
9813	OKALOOSA REG. DETENTION	2.00	4.00	1.00	7.00	-	14.00	223	625	-	848		
9814	ADOL. SUBST. ABUSE PGM	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	-	N/A		
TOTAL DJJ PROGRAMS		56.00	104.00	13.00	37.00	6.00	216.00	3,445	3,750	-	7,195		
TOTAL		1,618.00	1,782.00	2,844.00	4,113.00	605.00	10,962.00	\$ 174,858	\$ 87,500	\$ 137,640	\$ 399,998		

- NOTES:
1. INFORMATION SYSTEMS PROVIDED FCAT LEVELS AND ALGEBRA I FAILURES ON AUGUST 14, 2013. THE ALLOCATION INCLUDES MATH AND READING LEVELS 1 AND 2 FOR GRADES K-12.
 2. THE FOLLOWING SCHOOLS WILL RECEIVE ONE-HALF BASE ALLOCATION: 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 AND OKALOOSA REGIONAL DETENTION CENTER.
 4. THE SECONDARY TUTORING ALLOCATION WAS MADE TO MIDDLE AND HIGH SCHOOLS FOR THE PURPOSE OF COURSE RECOVERY AND/OR TUTORING STUDENTS ENROLLED IN A STATE EOC COURSE (ALGEBRA I, GEC BIOLOGY I, US HISTORY, OR CIVICS) TO ALLOW FOR SUCCESSFUL PASSING OF THE EXAM THE FIRST TIME ADMINISTERED. (INCLUDES HONORS CLASSES)
 5. THE TUTORING ALLOCATION WAS CALCULATED AS FOLLOWS: 8 HOURS PER WEEK X 31 WEEKS X \$37 PER HOUR = \$9,176 PER SCHOOL.

School District of Okaloosa County
Plan of Care – Project 6113
Instructions for Submitting Payroll
Fiscal Year 2013-2014

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.

Other Compensation forms should be turned in each month following the payroll schedule shown below:

<u>Tutoring Dates</u>	<u>Payroll Deadline</u>
August 19 – September 10	September 13
September 11 – October 4	October 16
October 7 – October 31	November 7
November 1 – December 2	December 5
December 3 – January 13	January 15
January 14 – February 10	February 12
February 11 – March 6	March 10
March 7 – April 11	April 15
April 14 – May 9	May 14

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
TIME SHEET**

NAME: _____ Employee ID: _____ JOB ID: _____

SCHOOL/DEPARTMENT: _____ COST CENTER #: _____

Note: A separate Other Compensation Report Time Sheet must be submitted for each activity an employee works. All information must be completed on this form which will in turn be attached to the Other Compensation Report (MIS 3180) submitted to Payroll.

DETAILED DESCRIPTION OF ACTIVITY:

DATE	START TIME	END TIME	HOURS WORKED

By signing below, I am acknowledging that I have performed the above listed activity and worked the hours I have indicated.

Signature of Employee

Date

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

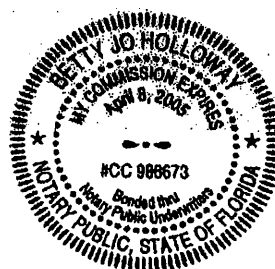
For the School Board:

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:



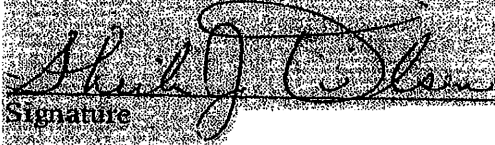
Memorandum of Agreement
between
Okaloosa County School Board
and
Okaloosa County Education Association

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.

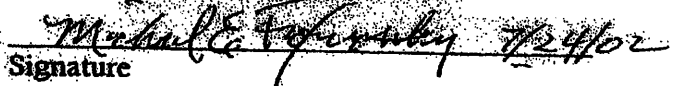
2. If the meeting occurs out of the 7.5 hour day, teachers will be compensated \$25.00 per hour for each meeting. They will be guaranteed a minimum of two (2) hours per student. No compensation will be given for hours beyond two (2) hours.
3. Teachers may request, on an individual meeting basis, the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

For OCEA:

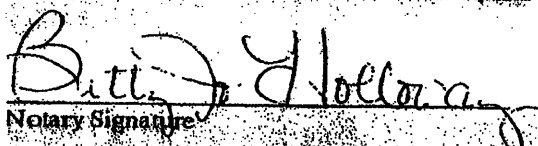

Signature

7-24-2002
Date

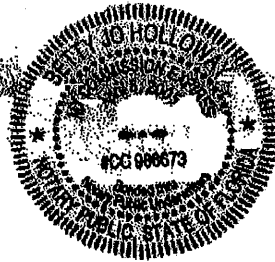
For the School Board:


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.

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:

Keith J. Wilson 7-24-2002
Signature Date

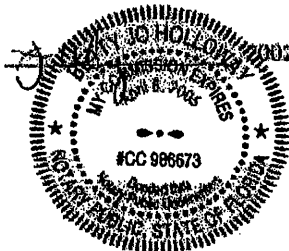
For the School Board:

Michael E. Forsyth 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 08, 2001

Betty Jo Holloway
1/14/99