



SCHOOL DISTRICT OF OKALOOSA COUNTY
TECHNICAL ASSISTANCE MEMORANDUM
FINANCE

FINANCE TAM: 2024-008
CONTACT: Jason Lulue
Budget Analyst
TELEPHONE: 833-5828

TO: School Principals
FROM: Julie Perry, Chief Financial Officer
DATE: September 11, 2023
SUBJECT: Plan of Care (POC) Allocation – Fiscal Year 2023-2024

The Plan of Care (POC) program for fiscal year 2023-2024 will be funded through the following projects:

- **Project 3456 – Intensive Before & After School Tutoring Allocation**
These funds may only be used for before and after school tutoring. During the day tutoring is *not* permitted with these funds. (4450.5100.Object.Center.3456)
- **Project 3453 – ESSER III – Supplemental Allocation**
These funds are flexible. They may be used for before, during, and after school tutoring. (4450.5100.Object.Center.3453)

It is extremely important that schools stay within the budgets allocated as there are NO additional funds.

- **Before & After School Tutoring (Projects 3456 & 3453)**
 - *Use Project 3456 – Intensive Before & After School Tutoring Allocation first.* If these funds are depleted, schools may use Project 3453 – ESSER III – Supplemental Allocation.
 - Instructional Employees are paid in 15-minute increments based on their degrees through Object 0102 – Other Compensation. Plan on an average cost (including benefits) of \$42 per hour.
 - Education Staff Professional Employees are paid in 15-minute increments based on their degrees through Object 0102 – Other Compensation. If the employee does not have a degree, he/she will be paid \$15 per hour. Plan on an average cost (including benefits) of \$42 per hour (degreed) or \$18 per hour (non-degreed).
 - Temporary Employees are paid in 15-minute increments based on their degrees through Object 0102 – Other Compensation. If the employee does not have a degree, he/she will be paid \$15 per hour. Plan on an average cost (including benefits) of \$35 per hour (degreed) or \$15.25 (non-degreed).
- **During the Day Tutoring (Project 3453 Only)**
 - *Use Project 3453 – ESSER III – Supplemental Allocation ONLY.*
 - Instructional Employees must be purchased through Focus as an Hourly Teacher. They are paid based on their degrees through Object 0132 – Salary – Hourly Teachers. Secondary teachers giving up a planning period will be paid one hour. Elementary teachers will be paid based on 15-minute increments depending on the length of their planning. Plan on an average cost (including benefits) of \$42 per hour.
 - Temporary Employees are paid in 15-minute increments as stand-alone substitutes based on the substitute/temporary employee rate of \$15 per hour through Object 0102 – Other Compensation. Plan on an average cost (including benefits) of \$15.25.

Allocation

- **Each school must stay within its budget as there are NO additional funds available.**
- Each school has been allocated funds based on their percentage of Level 1 and Level 2 students to their total FTE as shown on the attached spreadsheet.
- The spreadsheet indicates the amount allocated per project.
- Schools must charge all before and after school tutoring to Project 3456 – Intensive Before & After School Tutoring Allocation. If these funds are depleted, Project 3453 – ESSER III – Supplemental Allocation may also be used for before and after school tutoring.
- If a school plans to do any tutoring during the day, this must be charged to Project 3453 – ESSER III – Supplemental Allocation.

Tutoring Timeline

- **Tutoring may begin immediately.**
- **The last day of tutoring must be no later than May 10, 2024.**
- **Tutoring must be turned in to payroll no later than May 14, 2024, in order to be paid in the May payroll.**

Personnel & Payroll Procedures

Attached are the “Rules & Processes Related to Personnel” and “Instructions for Submitting Payroll.” **Other Compensation forms should be turned in each month according to the payroll schedule. Please read instructions carefully as there are some changes.**

Transportation

Transportation will be provided, and the District will pay all transportation costs. **The District will increase a school’s Plan of Care budget for transportation as expenditures are incurred. We ask that schools try to ensure that each bus has 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.

****Please contact the Transportation Department to arrange POC dismissal times. This will allow Transportation to ensure that bus drivers have time to finish their regular routes before the buses are required to return to schools for POC dismissal.****

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

1. Budget Issues – Jason Lulue at 833-5828
2. Payroll Issues – Mandy Jeter at 833-5849
3. Appropriate Use of Plan of Care Funds – Jeff Palmer at 833-4208
4. Transportation – Jay McInnis at 833-3551
5. Personnel Issues – Dr. Lee Hale at 833-5801

Attachments:

- Rules & Processes Related to Personnel
- Payroll forms and instructions

cc: Senior Staff
Payroll Supervisor
Transportation Program Director
OCEA
School Budget Bookkeepers
School Payroll Contacts

**School District of Okaloosa County
Plan of Care – Project 6113
Rules & Processes Related to Personnel
Fiscal Year 2023-2024**

Excerpt from Master Contract – Article XIX – Professional Compensation:

- V. If a teacher and the principal agree it is educationally necessary for the counselor to be present at a meeting between parents and retained students, 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 per the Appendix. 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.
- W. The regular rate of pay for supervising detention outside the regular work day shall be paid per the Appendix. Any employee who supervises a Saturday detention shall be paid for a minimum of five (5) hours.
- X. Retention plans that involve before and after school tutoring will use the following criteria:
1. 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.
 2. Priority will be given to district employees who are members of the instructional bargaining unit.
 3. If more than one bargaining unit member applies, the position should be offered based on criteria found in *Article X, Section B, #5* of the Master Contract.
 4. All certified personnel who tutor in a district or school program shall be compensated at the hourly rate found in Appendix of the Master Contract.
 5. If a teacher feels security problems exist during the teaching period of the remediation program at the school, the teacher should report it to the principal. If this does not resolve the problem, the teacher should forward their concerns to the Superintendent.
 6. 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.
 7. Teachers should send written documentation of poor behavior to the principal. A student should be moved to another tutor or denied the right to continue in the program.
 8. 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.

Clarification of Hourly Rates Referenced in Article XIX(X)(4): (Rates may change once the new contract is ratified)

The current Supplemental Hourly Rates are shown below.

Bachelor's Degree	\$33.89
Master's Degree	\$38.60
Specialist's Degree	\$41.96
Doctorate's Degree	\$45.27

The Education Staff Professionals Contract, Appendix D, lists the tutoring rate for non-certified personnel as \$15.00 per hour. Temporary/substitute employees will be paid the substitute rate of \$15.00 per hour.

Should you have any questions or need additional information, please call Dr. Lee Hale at 833-5801.

**School District of Okaloosa County
Plan of Care – Project 6113
Instructions for Submitting Payroll
Fiscal Year 2023-2024**

In regard to the compensation of tutors for before and/or after school tutoring and during the school day tutoring, please follow the instructions listed below:

A) Current District employees who tutor before and/or after school (including substitutes/temporary personnel) AND substitute/temporary personnel who tutor during the day:

- 1) Create a Misc. Pay batch in Focus titled: [Center] POC Tutoring Before/After School; Code: AOC-Other Comp.
- 2) Enter each employee for total hours worked in the pay period and applicable rate, then attach one of the following to the Files & Comments box:
 - a. Attendance rosters with names of students who attended the tutoring sessions, or
 - b. Other Compensation Report Time Sheet (MIS 3475).
- 3) Refer to the “Rules & Processes Related to Personnel” 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.

B) Teachers who tutor during the day:

- 1) Submit a Focus MIS 3386 request to purchase an hourly teacher position. Indicate the account strip to be charged and the subject to be tutored.
- 2) Teachers hired as an hourly teacher do not need to tutor every day. They will only be paid for the days they tutor.
- 3) Teachers must complete attendance rosters with names of students who attended the tutoring sessions. These attendance rosters must be turned in to the payroll person at the school.
- 4) Submit hours worked each payroll period as a Timecard Entry.

C) New Temporary/Substitute Tutor:

- 1) The individual must complete the necessary paperwork through Focus to become a District substitute. The Principal does not purchase the job through Focus.
- 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.

Should you have any questions or need additional information, please call Mandy Jeter at 833-5849.