

# The School District of Philadelphia



Building a System of Great Schools

## Guide to School Budgets

This guide serves as a resource for principals, School Advisory Councils, teachers, parents, community leaders and Assistant Superintendents as they collaboratively develop their school budgets for the coming academic year.

**SDP Office of Management and Budget**

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(Revised)

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**THE SCHOOL DISTRICT OF PHILADELPHIA**  
**GUIDE TO SCHOOL BUDGETS**  
**PREPARING FOR SCHOOL YEAR 2012-13**

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## Introduction to School Budgets

### The Role of School-Based Decision-Making and Central Allocations in Creating School Budgets

This Guide to School Budgets is intended to provide principals and School Advisory Councils (SAC) with useful information about each of the resources that are a part of their schools' budgets.

The Guide will explain how allotments of positions and dollars are determined for each school, and what latitude schools have to make decisions about how these resources are used. This document distinguishes between two major school budget categories: resources that are provided to schools, which they then make decisions about how to budget and use; and resources whose use and allocation is budgeted centrally, even though the resources are deployed in schools.

The major budget components in each of these categories are listed below and explained in more detail in the next two sections of this document.

#### **I. School-Based Resource Allocations:**

1. Regular Education Teacher and Prep Teachers
2. Operating Budget Allotment
3. Desegregation Support
4. Gifted and Talented Education
5. Special Education – Materials and Supplies
6. Title I (A)
7. Special Education – Learning Support
8. English as a Second Language (ESL) Teachers
9. School Improvement Funds

For the categories listed above, the SDP Office of Management and Budget (OMB) and the School District's central academic offices determine the amount of funding available to each school, and the school then decides what staff positions, services, or supplies to purchase with those funds, consistent with the Academic Guidance provided by the Superintendent and the Associate Superintendents. Schools have varying degrees of freedom in making choices, depending on the funding category.

#### **II. Centrally Allocated Resources:**

1. Annex, 504 Accommodation
2. Kindergarten Teachers
3. Reduced Class Size Initiatives
4. School-Based Social Services
5. Special Education – Emotional Support and Low Incidence

6. Special Education Liaisons (SELS)
7. English Language Learner Support – Bilingual Counselor Assistants
8. Instrumental Music Teachers
9. Career and Technical Education – Perkins Grant
10. Vocational Education Training
11. School Age Parents – ELECT Program
12. Accelerated Learning
13. School Nurses
14. School Police Officers
15. Safe Schools / Violence Prevention
16. Facilities/ Custodial
17. Food Services

For the categories listed above, various School District of Philadelphia (SDP) program offices determine the level of resources that can be allocated to each school. Schools do not have a role in allocating these resources but they may, in some cases, augment the centrally-allocated resources using their own funding sources.

The school-based and centrally-allocated resources described in this Guide represent most of the dollars allocated in school budgets. Some schools may receive additional allotments from more specialized sources, and/or may be recipients of grants and gifts not generally available to all schools. In general, those other sources contribute a relatively small amount to each school's total budget.

Please contact SDP Office of Management and Budget (OMB) with any questions you may have about resources not described here (an OMB contact list is included in the Appendices to this Guide).

### **Working with Different Funding Sources**

The School District receives funding from local school taxes authorized by the City of Philadelphia and also from grants provided to the District by the Commonwealth of Pennsylvania and the Federal Government. Some of the District's funding sources are highly flexible and can be used by the District for any legitimate purpose that advances the District's educational mission. Other funding sources are provided for very specific purposes and have a great number of restrictions placed on their use.

The two major funding categories in school budgets are as follows:

- **Operating Funds** are funds that can be used by schools for a variety of purposes and are basically "unrestricted." These include:
  - Operating Budget Allotment
  - Desegregation funds

- **Categorical Funds** are grant funds that have restrictions placed on their use by the grantor, e.g.:
  - Title I (A)
  - IDEA (Individuals with Disabilities Education Act)

### **Planning for Your School’s Operating Budget**

Schools’ Operating Budgets must be used to pay for some positions and items that are required by law and by collective bargaining agreements. In addition, academic policy guidance spells out some elements that should be included in each school’s budget and School Improvement Plan.

See the “SDP Legal and Contractual Mandates with Budgetary Implications” and “Academic Guidance for the 2012-2013 School Budget Process” documents found in the Appendices to this Guide for more information.

After legal requirements are met and academic priorities addressed, remaining funds may be used at each school’s discretion, consistent with the plans spelled out in the School Improvement Plan.

### **Using the School Improvement Plan to Build the School Budget**

Each School Improvement Plan should guide the allocation of discretionary dollars in that school’s budget. Each key strategy or action set forth in a School Improvement Plan should be incorporated into and provided for in that school’s budget.



## I. School-Based Resource Allocation Decisions

### 1. Regular Education Teachers and Prep Teachers

The largest single allotment in every school budget is the Regular Education Teacher Allotment, i.e., the number of regular education teachers allocated to each school.

**Office Responsible for Allocating the Resource:**

Office of School Resource Support

**Funding Source:**

Operating budget

**How the Amount is Determined:**

The Office of School Resource Support (SRS) develops enrollment projections for each school based on multi-year enrollment trends, feeder patterns, and other information – such as demographic data, or information about non-District school closings – about factors that are likely to result in enrollment changes. SRS then uses formulas to estimate the number of teachers that will be needed for the projected number of students.

Elementary schools receive regular teacher allotments in two steps. First, SRS allocates teachers to meet the maximum class size requirements of the District’s collective bargaining agreements, based on enrollment projections. Then, in the fall, teachers will be added to reduce class sizes in grades K-3. This process is summarized in the table below.

Grades	1. Max. Class Sizes	2. District-wide Average Targets	
		Empowerment Schools	Other Schools
K	30	23	26
1	30	25	28
2-3	30	25	29

The maximum class size for grades 4-8 under the District’s collective bargaining agreements is 33 students.

Elementary schools also receive additional teachers to cover preparation time periods, as required by collective bargaining agreements. Each elementary school teacher shall receive not less than 225 minutes of preparation time per week in addition to recess and lunch periods. Elementary schools may trade some of the teachers allotted for preparation time coverage by using other staff, such as Librarians, Counselors and Reading Teachers, to cover preparation time. Schools may need to budget for additional preparation time to cover common planning time or the purchase of additional teachers.

For middle schools, high schools, and Career and Technical Education (CTE) Schools, SRS determines teacher allotments using formulas that are designed to accommodate preparation time requirements; greater rostering complexity; and staffing economies of scale that are possible at larger schools.

Preparation time requirements for middle school teachers are 360 minutes per week for advisors and 270 minutes per week for non-advisors. High school teachers receive 225 minutes of preparation time each week. The ratios below are used to calculate the number of teachers that are budgeted to result in maximum class sizes of no more than 33, as required under the District’s collective bargaining agreements.

### **Middle and High School Teacher Allotment Ratios**

<b>School Level/ Type</b>	<b>School Size Bracket</b>	<b>Teacher Formula</b>	<b>Max Class Size</b>
Middle	N/A	Enrollment/ 22.5	33
High	First 700 students	Enrollment/ 24	33
High	Over 700 students	Enrollment/ 26	33
CTE	First 700 students	Enrollment/ 19.9	33
CTE	Over 700 students	Enrollment/ 22.9	33

In mid-October of each school year, through a process called “leveling,” the enrollment projections on which the Spring teacher allotments were based are compared with actual enrollment levels. Teachers then may be added to, or removed from, schools in order to better match staffing levels to the size of the actual student population.

## **2. Operating Budget Allotment**

### **Funding Source:**

Operating budget

### **How the Amount Is Determined:**

Amounts are based on what each school needs to operate, depending on its level and enrollment. These minimum funding requirements fall into three categories – legal and contractual requirements; operational practices; and Academic Guidance. The components of each of these are detailed below. It is important to note that following sections explain *how* Operating Budget Allotments were determined for each school; however, each school may spend the resulting amounts as they choose, as long as they comply with the Legal/ Contractual requirements and Academic Guidance.

#### **a. Legal/Contractual<sup>1</sup>**

- 1. Extracurricular Hours – Elementary Schools:** The PFT contract requires a total of 220 hours of extra-curricular hours allotted to each elementary school to pay for teachers serving as safety patrol sponsors (100 hours) and engaged in approved extracurricular programs (120 hours). In addition, a total of 40,404 hours must be distributed to elementary schools for approved activities, based on the size of their faculties (approximately 6.2 hours per teacher).

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<sup>1</sup> Enrollment Teachers are also a Contractual Requirement, but are provided in a separate allotment.

### Elementary School EC Requirements

FY13 EC Rate	\$51.26
Hours Per School/\$ Per School	220 hours \$11,277
Additional Hours/\$ Per Teacher Type	6.2 hours \$318

2. **Principals:** Pennsylvania law requires that a Principal perform the duty of evaluating teacher performance at each school.
3. **Counselors:** The PFT contract requires a minimum of one Counselor per school.
4. **Librarians/LIMAs:** The PFT contract requires at least one Librarian or Library Instructional Materials Assistant (LIMA) in schools with enrollment of 1,000 or more.
5. **Books/ Supplies:** The PFT Contract requires an allotment of \$100 per Teacher, Counselor and Librarian for supplies.

#### b. Operational Costs – Current Practices

1. **Assistant Principals:** Based on an analysis of the distribution of Assistant Principals by school level and enrollment in FY11, funding for Assistant Principal positions is provided according to the following schedule:

Range	Enrollment	Elementary: # of AP's	Middle: # of APs	High Schools: # of APs
Less than	300	0	0	1
Less than	700	0	1	1
Less than	1,500	1	2	2
Above or equal to	1,500	1	2	3

2. **Office Staff:** Based on an analysis of the number of office staff in schools in FY11, the Operating Budget Allotment allows for funding for office staff for each school as shown in the table below. The office staff ratios for schools with more than 600 students are equal to the 25th percentile, meaning that 25% of schools spent less on office staff, and 75% of schools spent more.

	ES	MS	HS
Secretaries Per School Enrollment < 600	1.0	1.0	1.0
Secretaries Per School Enrollment > 600 (75 <sup>th</sup> percentile)	1 day of service per 87 students	1 day of service per 59 students	1 day of service per 57 students

- 3. **Non-Instructional Staff:** Schools with enrollments of 500 or less are provided with funding equivalent to the FY2012-13 value of a Classroom Assistant position. Schools with enrollments of 500 to 1,500 receive \$76 per student, and schools with enrollments over 1,500 students receive \$150 per student.
- 4. **Books and Supplies:** In addition to the \$100 allotment, all schools purchase books and supplies for student instruction (and are responsible for replacing lost or damaged student textbooks and teacher guides). Budgets for schools for Books and Supplies are established on a per student basis, and relative amounts for the three school levels are based on an analysis of FY11 schools spending.

ES	MS	HS
\$24.27	\$30.30	\$27.51

- 5. **Summer Registration/ Reorganization:** Schools must pay staff for a specific number of days of Summer Registration/ Reorganization (“Summer Reorg”): 10 days in elementary schools, and the month of August in middle and high schools. The assumed cost of Summer Reorg as included in the Operating Budget Allotment depends on school level and whether the school has an Assistant Principal (based on enrollment as explained above).

	ES	MS	HS
W/ AP	\$6,700	\$22,810	\$24,490
No AP	\$11,470	\$29,840	\$30,700

Based on projected staffing, each school must calculate its projected Summer Reorg costs, or request that OMB calculate its projected Summer Reorg costs, and budget accordingly. Any difference between the budgeted amount and the amount used may be used for other purposes; however, if actual costs exceed the budgeted amount, then the difference must be transferred from another part of the school budget.

- 6. **Extracurricular Hours – Non-Contractual:** Although not required by contract, all Middle and High Schools spend some of their funds on extra-curricular time. EC hours for Middle and High Schools are based on the EC Allotments from FY10-11, updated with FY12-13 rates.
- 7. **Release Time:** Based on information provided by principals, spending for release time for functions such as Testing Coordinator, Roster Chair, and Dean of Students is estimated as follows (the table indicates the equivalent number of teacher positions):

Enrollment	Elementary	Middle/High Schools
Less than 500	0	0.5
500-1,000	0.2	0.8
More than 1,000	1.0	1.2

### c. Academic Guidance

1. **High School Counselors:** The Operating Budget Allotment includes funds that high schools will need to meet the 500:1 ratio requirement for counselor positions.

#### Must Be Used For:

The Operating Budget Allotment is to be used to satisfy the Legal/ Contractual and Academic Guidance requirements detailed in Appendix C, *SDP Legal and Contractual Mandates with Budgetary Implications* and Appendix D, *Academic Guidance for the 2012-2013 School Budget Process*. Highlights of these requirements are shown in the list and tables below.

- Principal: 1 per school
- Counselor(s): 1 per school for elementary schools; 1 per 500 students for high schools
- Teacher supplies: \$100 per teacher, counselor, and librarian
- Textbooks and Teacher Guides: replacement of lost or damaged textbooks and Teacher Guides
- Physical Education: for every elementary and middle school student
- Art and Music teachers: as required based on school level and size (see table below).

#### Requirements for Specific School Types

Category	Requirement
Elementary Schools	One Professional with current reading certification Extra-curricular (EC) hours: 100 hours per school to cover safety patrol; 120 hours per school for extracurricular programs
High Schools	One counselor for every 500 students (rounded to nearest 0.1 position)
High Schools < 600 Students CTE Schools	One world language
High Schools > 600 Students	Two world languages
Schools > 1,000 Students	One librarian or Library Instructional Materials Assistant (LIMA)

#### Art and Music Teacher Requirements

<u>2 Days per Week/ 0.4 Teacher</u>	<u>3 Days Per Week/ 0.6 Teacher</u>	<u>Full-Time Art or Music Teacher</u>
Schools with < 500 students	Schools with 500-999 students	Schools > 1,000 students

Once these requirements are met, funds may be used for any legitimate purpose consistent with the school's Action Plan.

#### Cannot Be Used For:

The Operating Budget Allotment may not be used for anything improper or for purposes that do not support the School Improvement Plan.

### **3. Desegregation Support**

**Funding Source:**

Operating budget

**How the Amount Is Determined:**

Desegregation Support funds for each school have been calculated as 50% of the amount received in FY11-12. The other 50% is being shifted to the Operating Budget for distribution to all schools using the Operating Budget Allotment formula. This is the second year of a multi-year phase-out of Desegregation Support funds; in FY13-14, it is anticipated that Desegregation Support funds will be eliminated entirely.

**Must Be Used For:**

The Desegregation Support allotment may be used as determined by each school.

**Cannot Be Used For:**

The Per School allotment may not be used for anything improper or for purposes that do not support the School Improvement Plan.

### **4. Gifted and Talented Education**

**Funding Source:**

Operating budget

**How the Amount Is Determined:**

Students who are thought to be mentally gifted and in need of specially designed instruction are evaluated per state guidelines against a set of criteria which include indicators of advanced skill and achievement, as well as IQ. Students meeting the criteria are designated Mentally Gifted. Gifted students receive a Gifted Individual Education Program (GIEP) detailing their individual needs and education plan.

Gifted Support funds per student at each school are the same as the per student amounts in FY11-12, except they have been escalated by 3% to offset the effects of inflation.

**Must Be Used For:**

Staff, services and supplies that will be used in support of students' GIEPs.

**Cannot Be Used For:**

The Gifted Special Education (SPED) allotment may not be used for anything that does not support students' GIEPs.

## **5. Special Education – Materials and Supplies**

### **Funding Source:**

Operating budget.

### **How the Amount is Determined:**

High Incidence Special Education teachers receive \$350 per teacher for materials and supplies. Low Incidence Special Education teachers receive \$640 per teacher for materials and supplies.

### **Must Be Used For:**

Materials and supplies that will be used in support of students' Individualized Education Programs (IEPs).

### **Cannot Be Used For:**

Materials and supplies that are not specified in students' IEPs.

## **6. Title I (A)**

### **Office Responsible for Allocating the Resource:**

Office of Grants Development and Compliance; Office of Management and Budget

### **Funding Source:**

Title I.

### **How the Amount Is Determined:**

The allotment of Title I (A) Basic funding is based on the number of poverty children per school, as identified by Temporary Assistance to Needy Families (TANF) / Supplemental Nutrition Assistance Program (SNAP) data and supplemented by statistical estimates.

The allotment per student is calculated in two steps:

- A basic allocation of \$240 per poverty child is provided first.
- An additional amount is added per poverty child based on a sliding scale or “ladder” that allocates more money per child at schools with higher poverty rates. The highest amount on the ladder is \$1,100 additional per student for a 100% school poverty rate. The ladder steps down at \$50 per poverty rate percentage point increments. The bottom of the ladder is \$50 additional per student for a 76% or lower school poverty rate.

Two additional steps cushion schools from major losses in funding levels to allow them time to adapt programs to funding levels, and ensure that every school can afford a basic level of service:

- Schools receive at least 80% of the amount they received the previous year, regardless of the result of the calculations described above (e.g., in FY12-13, schools will receive at least 80% of the amount they received in FY11-12.)

- Every school receives at least \$125,000, regardless of the result of the calculations described above.

Once the total amount of Title I funding for each school is determined as described above, two pieces of funding must be designated for specific uses:

- **Professional Development:** schools in any level of School Improvement status must use at least 10% of their Title I grant allocation for Title I-eligible professional development. Schools not in any level of School Improvement status must use at least 5% of their Title I grant allocation for professional development. (Warning schools are required to budget 10% for professional development, in case they go into School Improvement status in the fall. If they do not go into School Improvement status, they are allowed to revise this set-aside down from 10% to 5%.)
- **Parental Involvement:** schools must use at least 1% of their Title I grant allocation to support Title I-eligible parental involvement.

### Can Be Used For:

The purpose of this grant is to ensure that children have a fair, equal and significant opportunity to obtain a high quality education and reach the State's academic standards, particularly in reading, math and science. Title I purchases are generally to be used for academic supports; funds must be used to enhance the efforts of the District and upgrade the instructional program. Purchases are to be driven by a current needs assessment, and must be both aligned to and written into the Comprehensive Planning Document and the Federal Budget Addendum

Important Note: Per Assurance 8 in the Comprehensive Planning Document which reads,

*“At least one action plan incorporates, as appropriate, activities that extend instructional time before school, after school, during the summer, and/or as an extension of the school year,”*

schools must set aside funds to implement *instructional* learning time for students, particularly those at risk for failing. Schools with competitive School Improvement Grants (SSIG) must design extended learning opportunities that are available to *all* students.

Purchases with Title I grant funds should also follow several other principles:

- **Necessary:** Do we really need this to move forward our instructional program? Is this the minimum amount that we need to spend to meet the need?
- **Reasonable:** Do we have the capacity to use what we are purchasing? If asked to defend this purchase, would I feel comfortable?
- **Allocable:** Is this purchase in proportion to the value received by the program?

Please see Appendix I for more detailed information regarding the use of Title I grant funds.

### Cannot Be Used For:

Title I grant funds may not be used to provide basic requirements or mandated services needed to run an instructional program (known as the “Supplement, not Supplant” principle). Please see Appendix I for detailed information regarding the use of Title I grant funds.



**7. Special Education – Learning Support**

*Note: for more information about Special Education resources in school budgets, please see Central Resource Allocation Decisions, section 5.*

**Office Responsible for Allocating the Resource:**

Office of Specialized Instructional Services (OSIS)

**Funding Source:**

Operating budget

**How the Amount Is Determined:**

Every student with an IEP must be assigned to a Special Education teacher’s case load. Each school’s allotment of Learning Support funding is determined by the number of teachers estimated to be needed based on State and Federal regulations:

- Teacher case load: the number of students a teacher can be responsible for, given student need as defined in the Individualized Education Program (IEP):

**FY12-13 Caseloads as Determined by PA State Code, Chapter 14 and the IDEA**

	<b>Itinerant (&lt; 20%)</b>	<b>Supplemental (20% - 80%)</b>	<b>Full-Time (80% +)</b>
Learning Support	50	20	12

<b>Type of Service</b>	<b>% of Time a student receives service from Special Ed personnel</b>
<b>Itinerant</b>	20% or less of the school day
<b>Supplemental</b>	More than 20% but less than 80% of the school day
<b>Full time</b>	80% or more of the school day

- Student age range: teachers are limited to 3-year age span for grades K-8 and a 4 year age span for grades 9-12.

**Must Be Used For:**

Schools may determine how the Learning Support allotment will be used, as long as services are being delivered in compliance with the students’ IEPs and state regulations. The use of the allotment is subject to review by the appropriate Special Education Director.

**Can this Allotment Be Supplemented?**

Yes, schools may supplement their Learning Support allotments using discretionary funds.

**Cannot Be Used For:**

The Learning Support allotment may not be used for purposes that do not represent delivery of supports and services as specified in students’ IEPs.

## **8. English as a Second Language (ESL) Teachers and Bilingual Teachers**

The goal of ELL programming is to provide ELLs access to a high-quality education that prepares them for college, career and citizenship. ELL programming must provide ELLs with ESOL instruction that supports the acquisition of social and academic English proficiency as well as content standards.

### **Office Responsible for Allocating the Resource:**

Office of Multilingual Curriculum and Programs

### **Funding Source:**

Operating budget

### **How the Amount Is Determined:**

ESL Teachers and Bilingual Teachers support students who are learning English. Students take a test of English proficiency annually which places them into one of five categories, corresponding to service need, as shown below. As students progress in English proficiency, they exit the program, but must be monitored for two years by ELL resources.

1. Entering 2. Beginning	Approximately 3 periods per day of support
3. Developing	Approximately 2 periods per day of support
4. Expanding 5. Reaching	Approximately 1 period per day of support

Students in monitoring receive services based on their needs.

The ESOL Teacher allocation formula starts with calculating what could be called “need-weighted” enrollment using the number of students in each proficiency category:

$$\begin{array}{r}
 100\% \times (\# \text{ of Entering} + \text{ Beginning Students}) \\
 + 50\% \times (\# \text{ of Developing Students}) \\
 + 25\% \times (\# \text{ of Expanding} + \text{ Bridging} + \text{ Reaching} + \text{ Other Students}) \\
 \hline
 = \text{Need-Weighted Enrollment}
 \end{array}$$

The result is then divided by a student-teacher ratio of 30:1 to calculate the number of teachers. The teacher allotment is then converted to dollars.

There are a number of reasons that actual teacher allocations may differ from this calculated teacher allocation, as follows:

- a. K-8 grade span: schools with ELL students who are spread across more grades & proficiency levels have allocations rounded up to the next full position.
- b. Co-Teaching: schools successfully employing a co-teaching model using ESL teachers have allocations rounded up to the next full position.

- c. High School: because of the complexities of rostering at high schools, allocations are rounded up to the next full position.
- d. Partial positions: calculations resulting in a 0.7, 0.8, or 0.9 position have allocations rounded up to the next full position. Calculations resulting in a 0.1 position at schools where there is already at least 1.0 position are rounded down to the next full position.
- e. Legal Settlement Terms: schools receive additional teachers if additional service is specified in the terms of an applicable legal settlement.
- f. Special Education students: teacher allocations are rounded up where warranted by the IEPs of ELLs.
- g. Minimum number of ELLs: Schools with two or fewer ELL students receive no teacher positions. In such cases, Multilingual Managers will work with the students' families and schools to identify alternatives, such as an ESL program at another school that is appropriate for the students<sup>2</sup>, itinerant services, or up to 10 hours per week of tutoring.
- h. Other circumstances: rounding up or additional positions may be warranted by a Bilingual program serving heritage language speakers, a Transitional Bilingual Program, or a Newcomer Learning Academy.

**Please note that itinerant ESL teachers will continue to be a centrally allocated resource; they will not be a school-based resource.**

#### **Must Be Used For:**

The ESL allotment may be used as determined by each school, provided that the service needs of ELLs are being met, and the means of doing so can be demonstrated to the satisfaction of the appropriate Multilingual Manager.

#### **Tips for the Effective Use of ESL Funds:**

1. Consult assistant superintendent and multilingual manager
2. Follow the PA Basic Education Circular for ELLs – 22 Pa. Code 426  
[http://www.portal.state.pa.us/portal/server.pt/community/basic\\_education\\_circulars/7497](http://www.portal.state.pa.us/portal/server.pt/community/basic_education_circulars/7497)
3. Allocate ESOL teacher positions
4. Provide daily services
5. Provide school-based professional development on research-based ESOL strategies
6. Designate ESOL teacher positions site-selection
7. Designate new staff vacancies bilingual if appropriate depending on school demographics
8. Plan for potential increases or decreases in your ELL enrollment in the fall.
9. ELL students at entering (level one) and beginning (level two) spend the literacy block with the ESOL teacher in order to receive focused instruction in English language development. The new grades 1-8 ESOL curriculum materials are designed to specifically address the needs of levels one and two.
10. Castaneda vs. Pickard court ruling<sup>3</sup> requires educational programming for ELLs to be: 1) based on sound educational research; 2) implemented with adequate commitment and resources; and 3) evaluated and proven to be effective.

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<sup>2</sup> Itinerant teachers will serve the special admit schools based on the LeGare court consent decree.

<sup>3</sup> <http://www.colorincolorado.org/pdfs/policy/ELL-Policy-Guide.pdf>

**Continuum of Services:**

1. Full-Time ESOL teacher (Human Resources Process-school purchases)
2. Partial day ESOL teacher (Human Resources Process-school purchases)
3. Centrally allocated and assigned Itinerant ESOL Teacher (2 or less ELLs at levels 2 or up receive 0 allocation (offer option of going to school with a program, itinerant services or up to 10 hours of tutoring weekly)
4. Centrally allocated and assigned tutoring services (Title III)
5. Centrally purchased On-Line ESOL Program (Title III)

**Can this Allotment Be Supplemented?**

Yes, schools may supplement their allotment of ESOL or Bilingual Teachers using their own funds.

**9. School Improvement Funds****Office Responsible for Allocating the Resource:**

Office of Grants Development and Compliance

**Funding Source:**

School Improvement grant

**How the Amount Is Determined:**

Title I School Improvement Funds (1003a) are formula driven grant funds; that is, these grant funds are not competitively awarded. The Pennsylvania Department of Education's (PDE) Division of Federal Programs calculates eligible schools' grant allocations based on formulas in federal regulations. Generally speaking, there is a one year lag in grant eligibility and funding. Specifically, it is those schools that are in levels of School Improvement in 2011-2012 that generate per school Title I School Improvement Fund grant allocations, and then these same schools receive these funds in 2012-2013.

The PDE Division of Federal Programs utilized the formula below to allocate Title I School Improvement Funds.

- \$68,436 – schools that showed growth in both math and reading for 3 years, above 2 levels in 2011
- \$58,436 – schools that showed growth in both math and reading for the past 3 years
- \$48,436 – schools that showed growth in 2011 or identified as “Making Progress”
- \$38,436 – all other schools in a School Improvement or Corrective Action status

Schools' Title I School Improvement Allocations had to be reduced by three off-the-top set asides that apply to grant funds: indirect costs (1.0229%), audit (1.0025%), and funds set aside to both manage and monitor grants compliance (1.0179%).

**Must Be Used For:**

Title I School Improvement Funds must be used for those activities that will most directly impact and increase student achievement and bring the school out of School Improvement status. The schools should follow the Title I, Part A guidelines when considering how to allocate Title I School

Improvement Funds (please see Appendix I.) However, Title I School Improvement Funds *do not* have professional development or parental involvement set asides.

Purchases with Title I School Improvement grant funds should also follow several other principles:

- **Necessary:** Do we really need this to implement our School Improvement Plan and increase student achievement and/or close the achievement gap? Will this help move our instructional program forward?
- **Reasonable:** Do we have the capacity to use what we are purchasing in the current fiscal year (12-13)? If asked to defend this purchase, would I feel comfortable?
- **Allocable:** Is this purchase in proportion to the value received by the program?
- **Supplement not supplant** – If items purchased with these grant funds were removed from the building, would there still be an educational program compliant with all mandates?

*Note:* While Title I School Improvement Funds should be allocated using the same parameters as Title I, Part A funds, there is one exception. School Improvement Support Liaisons (SISLs) are an allowable expenditure for Title I School Improvement Funds. SISLs are *not* allowable with Title I, Part A funds. If a school wishes to purchase a SISL with Title I School Improvement Funds, the school will have to split-fund the position with another eligible funding source.

**Cannot Be Used For:**

Title I School Improvement Funds may not be used to provide basic requirements or mandated services needed to run an instructional program (known as the “Supplement, not Supplant” principle).

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## II. Central Resource Allocation Decisions

This section describes those resources that are distributed to schools by central program offices of The School District of Philadelphia. These resources must be used for the purposes prescribed by the assigning office.

Please note that centrally-determined resource levels for FY12-13 are preliminary and subject to change. In many cases, this is because final resource requirements will be determined by assessments that have not yet been conducted or for which results have not yet been received. In addition, initial central resource allocation decisions are often based on enrollment projections and will be adjusted based on actual FY12-13 enrollment levels.

The following information is provided for each centrally allocated resource category below:

- What the allocation is for;
- Which office makes the allocation;
- What the funding source is;
- How the allocation is determined; and
- Whether schools may supplement the centrally-determined amount.

### **1. Annex and 504 Accommodation**

These are positions that are required based on school building configurations or personnel needs:

- Annex: staff time to accompany younger students between buildings;
- “504” Accommodation: resources required to support staff with disabilities in accordance with Section 504 of the Rehabilitation Act of 1973.

#### **Office Responsible for Allocating the Resource:**

Office of School Resource Support (SRS)

#### **Funding Source:**

Operating budget

#### **How the Amount Is Determined:**

SRS staff evaluates needs and determines the amount of funding required on a case by case basis.

#### **Can this Allotment Be Supplemented?**

Yes, schools may supplement their Annex/ 504 Accommodation using their own discretionary funds (but not Title I funds).

## **2. Kindergarten Teachers**

### **Office Responsible for Allocating the Resource:**

Office of School Resource Support (SRS)

### **Funding Source:**

Kindergarten teachers are about half funded from the Operating budget and half from Title I.

### **How the Amount Is Determined:**

SRS develops enrollment projections for each school based on multi-year enrollment trends and information – such as demographic data, or information about non-District school closings – about factors that are likely to result in enrollment changes. SRS then uses formulas to estimate the number of teachers that will be needed for the projected number of students per union contract maximum of 30 students to one teacher.

### **Can this Allotment Be Supplemented?**

Yes, schools may supplement the Kindergarten teacher allotment using their own funds.

## **3. Reduced Class Size Initiatives**

### **Office Responsible for Allocating the Resource:**

Office of School Resource Support

### **Funding Source:**

Title I and Title II, as described below.

### **How the Amount is Determined:**

In FY12-13, class sizes will be reduced in two ways:

#### **a. Title I**

These funds are used to reduce class sizes in grades K-3.

#### **b. Title II (A) – To avoid split classes District-wide**

The PFT contract allows for split grade classes as long as the class size in total is does not exceed the maximum class size limit. Title II (A) funds are used to avoid all split grade classes across the District.

Reduced Class Size teachers will not be allocated until the fall, so they will be based on more accurate enrollment numbers.

### **Cannot be Used For:**

The allotments from these funds for reduced class size may not be used for any other purpose.

### **Can this Allotment Be Supplemented?**

Yes, schools may purchase additional teachers in order to reduce class size.

#### **4. School-Based Social Services**

**Office Responsible for Allocating the Resource:**

Counseling and Promotion Standards Office

**How the Amount is Determined:**

School Social Workers (SDP employees) or Resource Specialists (RSs) (contracted workers) provide School-Based Social Services, support for students who are experiencing barriers to learning. School Social Workers and RSs help to link students with, and coordinate, whatever services are necessary to support a student, and serves as a member of the CSAP team. In high schools, the service provider may provide students with brief clinical counseling.

In 2012-13, depending on funding availability, it is anticipated that there will continue to be a full-time School Social Worker or RS in each of the comprehensive high schools and at each of the Promise Academies. Other schools are anticipated to continue to receive service from itinerant personnel.

**Must Be Used For:**

School-Based Social Services

**Cannot be Used For:**

Any other purpose.

#### **5. Special Education – Emotional Support and Low Incidence**

Students diagnosed in one of the following federal categories are eligible for Special Education services:

▪ Autism	▪ Orthopedic impairment
▪ Deaf/ Blindness	▪ Other health impairment
▪ Deafness	▪ Specific learning disability
▪ Emotional Disturbance	▪ Speech or language impairment
▪ Hearing impairment	▪ Traumatic brain injury
▪ Intellectual disabilities	▪ Visual impairment including blindness
▪ Multiple disabilities	

Students diagnosed with certain disabilities and requiring specially designed instruction receive an Individualized Education Program (IEP). IEPs are legal documents developed jointly by schools and parents that define the objectives, services and evaluations to be implemented in support of a student's specific needs. They are renewed annually in compliance with state and federal laws.

Special Education (SPED) funding is allocated to schools to support IEP defined student needs with the appropriate level of service.



<b>High Incidence:</b>	<b>Low Incidence:</b>
<ul style="list-style-type: none"> <li>▪ Many children in the population</li> <li>▪ For students who meet eligibility criteria for <b>Learning Support</b> or <b>Emotional Support</b></li> </ul>	<ul style="list-style-type: none"> <li>▪ Fewer children in the population</li> <li>▪ For students who require <b>Autistic Support, Life Skills Support</b> or <b>Multiple Disabilities Support</b></li> </ul>
<ul style="list-style-type: none"> <li>▪ Supports student education to the extent possible with regular education peers, with accommodation strategies to meet their unique needs in the <b>Least Restrictive Environment</b></li> </ul>	

Student need, as defined in the IEP, is the most important factor driving special education teacher and staff allocation.

<b>Service Need:</b> % of time a student receives service from special education personnel	<b>Program Support:</b> type of service required
<p><b>Itinerant</b> –20% or less of the school day</p> <p><b>Supplemental</b> – more than 20% but less than 80% of the school day</p> <p><b>Full time</b>– 80% or more of the school day</p>	<p>Autistic Support</p> <p>Blind &amp; Visually Impaired Support</p> <p>Deaf &amp; Hearing Impaired Support</p> <p>Emotional Support</p> <p>Life Skills Support</p> <p>Multiple Disabilities Support</p> <p>Physical Support</p> <p>Speech &amp; Language Support</p>

**Office Responsible for Allocating the Resource:**

Office of Specialized Instructional Services (OSIS)

**Funding Source:**

Special Ed teachers and most Special Ed paraprofessionals are funded from the Operating budget. Other Low Incidence Special Education paraprofessionals (usually 1:1s) are funded through Individuals with Disabilities Education Act (IDEA) funds.

**How the Amount Is Determined:**

Every student with an IEP must be assigned to a teacher’s case load. Each school’s allotment of High and Low Incidence SPED teachers is determined by State and Federal regulations:

- Teacher case load: the number of students a teacher can be responsible for, given student need as defined in the IEP

**FY12-13 Caseloads as Determined by Pennsylvania State Code, Chapter 14 and the IDEA**

	<b>Itinerant ( &lt; 20% )</b>	<b>Supplemental ( 20% - 80% )</b>	<b>Full-Time ( 80% + )</b>
Emotional Support	50	20	12
Life Skills Support	20	20	12 (K-8) 15 (9-12)
Deaf and Hearing Impaired Support	50	15	8
Blind and Visually Impaired Support	50	15	12
Speech and Language Support	65	N/A	8
Physical Support	50	15	12
Autistic Support	12	8	8
Multiple Disabilities Support	12	8	8

- Student age range: teachers are limited to 3-year age span for grades K-8 and a 4 year age span for grades 9-12.

Based on the case load and age range regulations, High Incidence and Low Incidence SPED teachers are allocated to schools by OSIS as shown in the table above.

Preparation time for Low Incidence teachers is allocated to schools by the Office of Management and Budget using a formula based on contractual requirements (see the section of this Guide on the Regular Education Teacher Allotment).

Special Education Classroom Assistants are allocated to schools as follows:

- 1 Special Education Classroom Assistant per Emotional Support class
- 1 Special Education Classroom Assistant per Autistic Support class
- 1 Special Education Classroom Assistant per Life Skills Support class
- 2 Special Education Classroom Assistants per Multiple Disabilities Support class.

**Must Be Used For:**

Special Education teachers, prep time for Low Incidence teachers, and Special Education Classroom Assistants and 1:1 Assistants.

**Can this Allotment Be Supplemented?**

Yes, schools may supplement their Special Education allotments using their own funds.

**Cannot Be Used For:**

Anything unrelated to the delivery of Special Education services.

**6. Special Education Program Specialist****Office Responsible for Allocating the Resource:**

Office of Specialized Instructional Services (OSIS)

**Funding Source:**

Individuals with Disabilities Education Act (IDEA) grant

**How the Amount is Determined:**

Special Education Program Specialist positions will be allocated to schools by OSIS as full positions, 0.5 positions, or itinerant positions, depending on the number of students with IEPs, the number of Special Education teachers, and the number of programs at each school. These new positions will not be loaded in SMS, because allocations may be adjusted throughout the year based on changing needs.

OSIS will no longer provide funding for Special Education Liaisons; however, schools may continue to use their own funds to release their Special Education teachers to provide SEL duties if they choose.

**Must Be Used For:**

These positions are funded from IDEA funds and will perform a specific set of Special Education program support functions, including the following:

- Serving as liaisons between schools and Special Education Directors;
- Training schools in the management of Special Education programs, services, and compliance;
- Supporting principals in recognizing rigorous instructional practices and ensuring accurate data reporting and compliance; and
- Providing training and coaching for teachers.

**Cannot Be Used For:**

Anything other than Special Education Program Specialist duties.

**7. ELL Support – Bilingual Counseling Assistants****Office Responsible for Allocating the Resource:**

Office of Parent, Family, Community and Faith-Based Initiatives

**Funding Source:**

Operating budget and Title III grant

**How the Amount Is Determined:**

Positions are allocated according to the greatest identified need for translation services for parents and other community members in support of ELL students.

**Can this Allotment Be Supplemented?**

Yes, schools may supplement their Bilingual Counseling Assistant allotment using their own funds.

## **8. Instrumental Music Teachers**

Schools receive an allotment of instrumental music teachers who divide their time among multiple schools (itinerant teachers) from the Department of Comprehensive Arts Education. The allotment for any one school is therefore typically not a whole number, with each 0.2 position representing one school day of service. About 190 schools receive these services; not all schools have instruments and instrumental instruction.

**Office Responsible for Allocating the Resource:**

Office of Comprehensive Arts Education

**Funding Source:**

Operating budget

**How the Amount Is Determined:**

One half-day per week of itinerant music teacher capacity is provided for every 15 students expressing an interest in an area of instrumental music; for example, a school would receive one half a day of string service if it had fifteen string instruments, one half day of wind teacher service if a school had 15 wind instruments, or one half day of percussion service if a school had 15 percussive instruments. The following factors are also considered in the assignment of itinerant music teachers:

- Principal support for instrumental music (e.g., allowing students to be released from class for instrumental time)
- Appropriate instrument inventory to match teacher service
- Whether appropriate classroom space is available for instrumental classes and a secure place to store instruments
- Whether a school has a staff member, such as a full-time music teacher, who can assure the safety of instruments.

**Can This Allotment Be Supplemented?**

Schools may be able to supplement their instrumental music allotment using their own funds, (except for Title I funds, unless used to release teachers for Professional Development or to provide Preparation Time coverage) depending on the availability of itinerant teachers and District-wide demand for their services.

## **9. Career and Technical Education - Perkins Grant**

**Office Responsible for Allocating the Resource:**

Office of Career and Technical Education

**Funding Source:**

Perkins Grant

**How the Amount Is Determined:**

The amount of the grant award is determined by the number of students enrolled in State certified vocational programs District-wide. This information is supplied by the Office of Career and Technical Education, which measures Vocational Average Daily Membership (VADM). It is a legislative requirement that federal resources be concentrated in amounts sufficient to bring about measurable improvement. A secondary school must qualify for a grant of at least \$15,000 under the formula to receive an allocation.

**Must Be Used For:**

The funds must supplement existing programs. The following are allowable uses:

- Involvement of parents, business & labor organizations in the design, implementation & evaluation of Career and Technical Education (CTE) programs;
- Career guidance/academic counseling;
- Develop local education & business partnerships;
- Provide programs for special populations;
- Professional development;
- Integration of academics and vocational education;
- Improving or developing new CTE courses;
- Activities to support entrepreneurship education and training;
- Develop initiatives that facilitate transition of sub baccalaureate career and technical education students into baccalaureate degree programs;
- Provide CTE programs for adults and school dropouts to complete secondary education or upgrade technical skills;
- Support training and activities in nontraditional fields.

**Cannot be Used For:**

The following uses are not permitted:

- Remediation;
- Furniture;
- Construction costs;
- Equipment or supplies not used directly to teach skills to students;
- Administrative/supervisory or secretarial salaries;
- Travel unrelated to the program;
- Routine consumables/supplies, except those required to provide additional services to special population students;
- Instructional costs or tuition of either technical or academic courses used to meet graduation, degree or certificate requirements (under the supplement, not supplant rule).

**10. Vocational Education Training****Office Responsible for Allocating the Resource:**

Office of Career and Technical Education

**Funding Source:**

Operating budget

**How the Amount Is Determined:**

Allotments are used for teachers or teacher assistants to provide expanded opportunities for students to participate in approved Career and Technical Education programs. In order to receive funds, a school must have an approved program that conforms with state and federal guidelines, and enough students to warrant an additional teacher in the school.

**Can This Allotment Be Supplemented?**

Yes, schools may supplement their Vocational Education staff using their own discretionary funds.

**11. School Age Parents – ELECT Program****Office Responsible for Allocating the Resource:**

Early Childhood Education

**Funding Source:**

ELECT grant and operating budget matching funds

**How the Amount Is Determined:**

The Education Leading to Employment, Career and Training (ELECT) program provides services to pregnant and parenting teens with goal of helping them complete high school. The program operates in 35 different comprehensive high schools and alternative education settings. Program participants receive educational and social services and learn parenting skills. The program is primarily funded from the ELECT grant; allotments to schools represent teacher positions that are the School District's operating budget match for the grant.

**Can This Allotment Be Supplemented?**

Yes, schools may supplement their ELECT Program resources using their own discretionary funds.

**12. Accelerated Learning****Office Responsible for Allocating the Resource:**

Secondary School Reform

**Funding Source:**

Operating budget

**How the Amount Is Determined:**

The Accelerated Learning funding supports proficient and/or advanced performing students through programs and resources such as the International Baccalaureate Program, Advanced Placement courses, Spring Board, and on-line exam prep courses. The Accelerated Learning allotment to schools

specifically funds release time for a teacher to fulfill the responsibilities of International Baccalaureate Coordinator.

**Can This Allotment Be Supplemented?**

Yes, schools may supplement their Accelerated Learning allotment using their own discretionary funds.

**13. School Nurses**

**Office Responsible for Allocating the Resource:**

Office of Student Health Services

**Funding Source:**

Operating budget

**How the Amount Is Determined:**

Nurses are allocated based on enrollment and specific student needs (e.g., multiple low incidence programs, student medication needs).

**Can This Allotment Be Supplemented?**

Yes, schools may supplement their school nursing staff using their own discretionary funds (not Title I funds).

**14. School Police Officers**

**Office Responsible for Allocating the Resource:**

Office of School Safety

**Funding Source:**

Operating budget

**How the Amount Is Determined:**

Officers are allocated to schools based on criteria including the following:

- Index of serious incidents reported at each school
- Size and footprint of schools
- Enrollment
- Persistently Dangerous status
- Numbers of suspensions
- Number of non-instructional staff members at schools

As a result of this allocation process, the range of officers per school is 0 to 8. About 103 schools do not have an assigned officer.

In addition to police officers who are assigned to schools, there are police officers who are deployed to schools temporarily as needed, and police officers in the Mobile Security Unit who make routine school security checks.

In 2012-13, the Office of School Safety did not load School Police Officers for any elementary schools in SMS in order to maintain more flexibility in deploying officers and adjusting deployments throughout the year. Elementary schools will still have School Police Officers; they are just not shown in SMS.

**Can This Allotment Be Supplemented?**

No, schools may not augment their number of school police officers.

**15. Safe Schools / Violence Prevention Programs**

*Note: this allotment appears in SMS as “Suspension.”*

**Offices Responsible for Allocating the Resource:**

Student Discipline, Hearings, and Expulsions; Chief Academic Officer

**Funding Source:**

Operating budget

**How the Amount Is Determined:**

In the hierarchy of needs, school safety understandably outranks academic performance because without safety, fear increases, parent confidence is eroded, and teaching and learning is undermined. The District is committed to implementing programs and services that build positive relationships among students and between students and staff.

**How the Amount Is Determined:**

This allotment is provided to the elementary and middle schools that had the highest rate of violent incidents in the 2011-2012 school year based on data through March 2012. The Safe Schools / Violence Prevention allotment is \$40,000.

**Must be Used For:**

The Safe Schools allotment is provided to help schools implement any of five important programs/interventions:

- Bullying Prevention Programs
- Conflict Resolution Programs
- Peer Mediation Programs
- Positive Behavioral Interventions and Support (PBIS) Programs
- Restorative Practice Programs

Specifically, these funds must be utilized to purchase staff or contracted services from vendors in support of any of these programs.



**Can This Allotment Be Supplemented?**

Yes, schools may supplement their Safe Schools / Violence Prevention Program funds.

**16. Facilities/ Custodial**

*Note: Facilities and Custodial staff are not tracked in SMS.*

**Office Responsible for Allocating the Resource:**

Office of Facilities Management

**Funding Source:**

Operating budget

**How the Amount Is Determined:**

Custodial employees are assigned to schools based on square footage. Every school has at least one building engineer; larger schools may have 2 or 3, depending on their size and the complexity of the facilities. Other custodial positions assigned to schools are Custodial Assistants and General Cleaners.

**Can This Allotment Be Supplemented?**

No, schools may not augment their custodial services staff.

**17. Food Services**

*Note: Food Services staff are not tracked in SMS.*

SDP provides breakfasts and lunches to every school, as well as snacks and dinners in about 170 buildings where eligible enrichment programs are underway. There are three types of food programs:

- Full-service: requires more preparation on site and therefore a larger staff on site (mostly secondary schools)
- Modified full-service: meal components are pre-packaged, but some assembly required
- Satellite: pre-packaged meals are delivered to school, requiring no more than one or two people on site.

**Office Responsible for Allocating the Resource:**

Office of Food Services

**Funding Source:**

Food Services Fund

**How the Amount is Determined:**

Food services staff is assigned to schools based on the type of food program and the number of meals served. The cost of food is allocated based on number of pupils served and a cost per meal amount.

**Can This Allotment Be Supplemented?**

Yes, schools may supplement food services staff, food, and supplies with their own discretionary funds (but not Title I funds).



# **APPENDICES**



**Appendix A: FY12-13 School Improvement Plan Timeline**

Dates	Topic/Activity/Deliverables
Jan 19 <sup>th</sup> - Feb 9 <sup>th</sup>	Action Plan Overview Training Sessions
Feb 27 <sup>th</sup> - March 6 <sup>th</sup>	Comprehensive Planning Training Sessions
Mar 7 <sup>th</sup> - Mar 28 <sup>th</sup>	Drop-in Sessions
<p><i>On or before</i>  <b>April 9<sup>th</sup></b></p>	<p align="center"><b>Comprehensive Planning Document Due to the Assistant Superintendent and the Office of School Improvement</b></p> <p>Electronic and (1) hard copy submitted to:            Assistant Superintendent <b>and</b>            DeAnne Wimbish, contact 215-400-5371;  <a href="mailto:dwimbish@philasd.org">dwimbish@philasd.org</a>            440 North Broad Street            2<sup>nd</sup> Floor Portal A, Suite 2122</p>
<p><b>April 9<sup>th</sup>–            April 27<sup>th</sup></b></p>	<p align="center"><b>Assistant Superintendent and Office of School Improvement Review of Comprehensive Planning Document</b></p> <p>Reflective feedback and recommendations for revision will be forwarded to principals by the Office of School Improvement. ALL recommendations for revision <b><u>must be incorporated</u></b> into the finalized plan. Select schools will be notified by the Assistant Superintendent of the requirement to defend their plan.</p>
<p><b>May 11<sup>th</sup></b></p> <p><b>May 1, 2012            Online tool is available</b></p>	<p align="center"><b>Finalized Comprehensive Planning Document Due to the Office of School Improvement</b></p> <p>Finalized Plans incorporating necessary revisions should be submitted to:            Electronic and (3) hard copies to:            Assistant Superintendent <b>and</b>            DeAnne Wimbish, contact 215-400-5371;  <a href="mailto:dwimbish@philasd.org">dwimbish@philasd.org</a>            440 North Broad Street            2<sup>nd</sup> Floor Portal A, Suite 2122</p>

<b>Dates</b>	<b>Topic/Activity/Deliverables</b>
<b>May 14<sup>th</sup> – 31<sup>st</sup></b>	<p style="text-align: center;"><b>Action Plan Defenses</b></p> <p>Select schools along with their leadership teams will defend their Comprehensive Planning Document. Schools will be selected to defend their plan based upon the review criteria and the discretion of the Assistant Superintendent.</p>
<b>June 4<sup>th</sup> – 22<sup>nd</sup></b>	<p style="text-align: center;"><b>Approved plans must be uploaded into the on-line system.</b></p> <p style="text-align: center;"><b>Principals will use their log in credentials to access the online system.</b></p> <p style="text-align: center;"><b>DUE DATE June 22<sup>nd</sup></b></p> <p style="text-align: center;"><b>Schools will receive a confirmation email to upload plan into the online system.</b></p>

**Appendix B: FY12-13 School Budget Development Timeline**

1/1 – 1/8	Meetings with principals at each academic division to introduce FY13 school budgets Principals receive enrollment projections
3/12 – 3/23	<i>PSSAs</i>
4/2 – 4/6	<i>Spring break</i>
<b>4/5</b>	<b>School budgets available in SMS; FY13 Guide to School Budgets issued</b>
4/5 – 4/20	Principals and school communities work on budgets
4/23 – 5/11	Central offices support principals with finalizing school budgets
5/14	Vacancy list established; potential teacher layoffs determined
5/14 – 6/15	Site selection period
5/1 – 6/29	Forced transfer process – non-instructional staff
6/19	<i>Last day of school for teachers</i>
6/15 – 7/6	Voluntary/ forced transfer process – instructional staff*
7/9 – 7/20	Site selection re-opened for new hires only
7/21	Completion of external hiring

\* The voluntary/ forced transfer process for instructional staff will be completed by June 29 if possible. If it is, site selection for new hires will be re-opened for new hires one week sooner, from July 2 to July 13.





## **Appendix C: Legal and Contractual Mandates with Budgetary Implications**

There are numerous federal, state and local laws and regulations, collective bargaining agreement provisions and School Reform Commission and Administration mandates that schools must follow. This document is only intended to describe those mandates which have budgetary implications and which are imposed upon the District by outside authorities or collective bargaining agreements. This is by no means a comprehensive list of all mandates with which schools must comply. Academic mandates established by the Chief Academic Officer are listed in Appendix D.

### **Federal and/or State Laws:**

<b>Mandate</b>	<b>How to Meet the Mandate</b>
<b>Individuals with Disabilities Education Act (IDEA):</b> Children with disabilities shall be provided an education which enables them to be involved in and progress in the general curriculum. The education program provided to children with disabilities shall be in accordance with their Individualized Education Programs (IEPs) under the IDEA.	Work with your Special Education Director to ensure that all student IEPs are being followed with fidelity.
<b>Rehabilitation Act of 1973 – Section 504:</b> No otherwise qualified individual with a disability shall, solely by reason of her or his disability, be excluded from the participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance.	Funding for employees requiring Section 504 accommodations should have been provided for in your budget; this funding must only be used for the purpose identified. If you believe that you have an employee requiring Section 504 accommodations for whom you have not received funding, please contact School Resource Support (SRS).
<b>Gifted Students:</b> Students who are gifted shall be provided an education that enables them to participate in acceleration or enrichment, or both, as appropriate.	Funding for students identified as gifted has been provided in your budget and must be used to meet the requirement of the gifted students' IEPs.
<b>Nurse Services:</b> Every child of school age shall be provided with school nurse services: The number of pupils under the care of each school nurse shall not exceed one thousand five hundred (1,500).	Nurse services are centrally allocated and may also be purchased in one day per week increments. Each day is equivalent to 0.2 of a nurse position.

**Collective Bargaining Agreement Provisions:**

<b>Mandate</b>	<b>How to Meet the Mandate</b>
<p><b>Maximum Class Sizes (Regular Education):</b>            Grades K through 3: 30 students to 1 teacher            Grades 4 through 12: 33 students to 1 teacher</p>	<p>You have been allotted funding for the number of teachers the School Resource Support Office (SRS) believes is needed to meet these mandates, given current enrollment projections. If enrollment increases or decreases significantly from the current projection, funding will be adjusted accordingly. If you do not believe that you can meet these mandates with the funding provided, or if you believe that you can meet these mandates without using all of the funding provided, please contact SRS to review your roster plans.</p>
<p><b>Teacher Prep Time:</b>            Elementary – 225 minutes per week            Middle – 360 minutes per week for advisors, 270 minutes per week for non-advisors            High – 225 minutes per week</p>	<p>Same directions as above.</p>
<p><b>School Counselor:</b> A minimum of one school counselor per School is required by the PFT.</p>	<p>This mandate is superseded by the Academic Guidance requirement for high schools to have 1 counselor per 500 students. It may also be superseded by the educational requirements contained in your School Improvement Plans.</p>
<p><b>Librarian or Library Instructional Materials Aide (LIMA):</b> Every school with 1,000 or more students must have a librarian or LIMA.</p>	<p>If your school enrollment is projected to be 1,000 or greater, you must budget for at least a LIMA.</p>
<p><b>Elementary School Extra-Curricular Pay (EC):</b> Each Elementary School must budget for all three of the following:            100 hours of EC pay for a safety patrol            120 hours of EC pay per school            6.5 hours of EC pay per teacher type (includes counselors and librarians) – This is required for the District to meet a requirement of 40,404 EC hours to be budgeted in Elementary Schools in addition to the first two items.</p>	<p>The contractual EC amount for elementary schools is shown at the top of the Operating tab in SMS. Make sure that a minimum of this amount of EC pay is budgeted.</p> <p>To calculate the amount, multiply the number of teacher-types you have budgeted by 6.5, add 220 and multiply the total by the contractual EC rate of \$51.26/hour (including benefits).</p>
<p><b>Facilities Coverage during Evening and Weekend Hours:</b> School buildings cannot be open without coverage from facilities Staff, generally the Building Engineer.</p>	<p>You will need to budget to pay overtime to your Building Engineer and/or other facilities staff for activities using the Building outside of its normal hours of coverage. If you have questions, please contact your Facilities Area Coordinator.</p>

## **Appendix D: Academic Guidance for the 2012-2013 School Budget Process**

The following recommendations have been established by the Chief Academic Officer. Compliance with these recommendations will be monitored by your Assistant Superintendent, the Office of Management and Budget, the Office of School Resource Support, the Office of Grants Compliance/Title I and other central offices with compliance responsibilities.

In addition to the academic guidelines listed below, there are numerous federal, state and local laws and regulations and collective bargaining agreement provisions that schools must follow; these are shown in Appendix C, “Minimum Legal and Contractual Mandates with Budgetary Implications.” For items such as class size and counselor ratios that are listed on both documents, the academic guidelines are more strict and supersede the legal and contractual mandates.

Due to continuing budget reductions, schools will again have greater flexibility with regard to the Academic Guidance in FY12-13. Since the positions and funding allocated by central offices to schools continue to be significantly reduced, in most cases, schools may determine whether to follow Academic Guidance items (look for “may purchase,” which means that an item is not a required expenditure).

### **1. Positions to be Funded from School Budgets and/or Centrally Allocated Funds**

<b>Funded from School Budget Formulas</b>	<b>Centrally Allocated Positions and Other Resources</b>
<p><b>Counselors:</b> High Schools are to purchase a minimum of one counselor for every 500 projected students using its own school budget funds. This requirement exceeds the minimum of one counselor per school that is legally mandated in the PFT contract (see Legal Mandates). <i>Title I eligible</i></p>	<p><b>Counselors:</b> Note that centrally-allocated counselors will <b>not</b> be provided in FY12-13.</p>
<p><b>Department Chairs (Optional):</b> Each High School may purchase one release period per day for each of the 4 Core Content Areas. Purchasing one release period for one teacher is the equivalent of purchasing 0.2 of a full 1.0 teacher position. The four core content areas are English, Math, Science and Social Studies. <i>Title I eligible if documented in the School Improvement Plan, logs are kept for the released period which will be used for professional development, a roster is produced, and associated documentation is maintained.</i></p>	<p><b>Department Chairs:</b> No central funding will be provided for these positions.</p>

**2. Guidance Related to Rostering Teachers**

<b>Funded from School Budget Formulas</b>	<b>Centrally Allocated Positions and Other Resources</b>
<p><b>World Language Programs:</b> All High Schools with 600 or more students must provide at least 2 world languages to their students; High Schools with fewer than 600 students must provide 1 world language. CTE Schools regardless of size must offer 1 world language. <i>Not Title I eligible</i></p>	<p><b>World Language Programs:</b> No central funding will be provided for these positions.</p>
<p><b>Art or Music Teacher(s):</b> All schools are to purchase the following level of art or music teachers, depending on their enrollment:            Up to 499 students: 2 days/week, or 0.4 of a teacher            500 to 999 students: 3 days/week, or 0.6 of a teacher            1,000 or more students: 5 days/week, or a full teacher            The art or music teacher position is to be funded from existing school teacher and prep teacher allocations and/or other school level resources.  <i>Title I eligible in elementary and middle schools if: a) the purchase is over and above required prep and b) the purchase allows core teachers to be released for common planning time, CSAP, or professional development. A roster must be produced. Associated documentation must be maintained.</i></p>	<p><b>Art or Music Teachers:</b> No central funding will be provided for these positions.</p>
<p><b>Physical Education Program</b> – Every elementary and middle school must provide a physical education program for every student. <i>Not Title I eligible</i></p>	<p><b>Physical Education Program:</b> No central funding will be provided for this program.</p>

## Appendix E: Central vs. School Based Resource Allocation Summary, FY2012-13

SCHOOL BUDGET RESPONSIBILITY <sup>1</sup>	CENTRAL OFFICES RESPONSIBILITY <sup>2</sup>	CENTRAL RESPONSIBILITY - SCHOOLS MAY SUPPLEMENT <sup>3</sup>
<b>Personnel</b>		
Teachers, including and Learning Support teachers, ESOL teachers, and Art/ Music teachers	Special Ed teachers other than Learning Support; Special Ed paraprofessionals & related service providers; itinerant instrumental music teachers	Itinerant ESOL teachers Special Education teacher positions to release the SEL
Paraprofessionals, inc. Classroom Assistants, Noon-Time Aides and Supportive Service Assistants (SSAs)	Paraprofessionals for annexes and 504 Accommodation	
Librarians/ LIMAs	Vocational Education	Supplementary Vocational Education
Elementary, Middle schools: 1 counselor per school High schools: minimum of 1 counselor for every 500 projected students		Bilingual Counselor Assistants (BCAs) Counselors – schools may purchase additional counselor positions to reduce student: counselor ratios
Building administration – leadership and office support	School police officers	School police officers for Saturday and after-school activities
Substitutes – staff development absences	Substitutes – non-staff development absences	
Extra-curricular/ extended day non-athletic student activities, including Saturday school	Athletics coaches	
Social workers	Nurses based on enrollment and need	Additional Nurse positions
	Lunch room/ cafeteria services	Supplemental lunch room/ cafeteria services
	Custodial services	Supplementary custodial services
<b>Services and Supplies</b>		
School-based Professional Development Special Education professional development and supplies	Non-school-based Professional Development	Supplementary Professional Development
Instructional materials, library books, computer hardware and software	Information technology network support and technical assistance	
Optional test preparation or other assessment-related activities	District-wide assessment materials	
Replacement textbooks (for lost and damaged textbooks)	Basic textbooks for changes in curriculum or for additional enrollment	
	Copiers, furniture (purchase, repair and maintenance)	Supplemental equipment and furniture
Telecommunications/ telephone service	Other utilities	
Language translation for school-based communications and events	Transportation	

1. *School Budget Responsibility: Schools are responsible for budgeting for these items from their allocated funds.*
2. *Central Offices Responsibility: Resource levels will be determined, and these items budgeted, by School District of Philadelphia central offices (not by the schools). Allocations of resources in this column are determined each year.*
3. *Central Office Responsibility – Schools May Supplement: Basic resource levels will be determined, and these items budgeted, by School District of Philadelphia central offices (not by the schools). Schools may choose to augment these resources using their own budgets.*



**Appendix F: FY12-13 Average Salaries**

<b>MATRIX OF POSITIONS AND SALARIES ELEMENTARY SCHOOL EDUCATION</b>			
<b>POSITIONS</b>	<b>2012-2013 AVERAGE SALARY</b>	<b>FRINGE BENEFITS</b>	<b>TOTAL SALARY &amp; BENEFITS</b>
Assistant Principal	\$103,800	\$41,100	\$144,900
Assistant Principal - 12 Months	\$116,200	\$43,500	\$159,700
Auxiliary Teacher	\$34,900	\$24,500	\$59,400
Bilingual Counseling Assistant	\$32,200	\$21,300	\$53,500
Classroom Assistant	\$27,700	\$21,200	\$48,900
Climate Support Assistant	\$40,600	\$24,200	\$64,800
Community Relations Liaison	\$39,500	\$29,700	\$69,200
Conflict Resolution Specialist	\$32,700	\$23,200	\$55,900
Counselor	\$68,700	\$30,800	\$99,500
Health Room Technician	\$8,700	\$6,500	\$15,200
Instructor, JROTC	\$70,998	\$38,228	\$109,226
Librarian	\$68,700	\$30,800	\$99,500
Library Instructional Materials Asst	\$32,700	\$22,400	\$55,100
Non Teaching Assistant	\$40,300	\$24,100	\$64,400
Noon Time Aide (One Hour Daily)	\$2,000	\$600	\$2,600
3 Hr Noon Time Aide	\$6,000	\$1,800	\$7,800
3.5 Hr Noon Time Aide	\$7,000	\$2,100	\$9,100
4 Hr Noon Time Aide	\$8,000	\$2,400	\$10,400
4.5 Hr Noon Time Aide	\$9,000	\$2,700	\$11,700
5 Hr Noon Time Aide	\$10,000	\$3,000	\$13,000
Nurse	\$77,500	\$31,700	\$109,200
Principal, 10 Months	\$108,600	\$41,700	\$150,300
Principal, 12 Months	\$129,100	\$45,800	\$174,900
School Aide II	\$28,900	\$20,200	\$49,100
School Improvement Support Liaison	\$42,400	\$30,600	\$73,000
School Operations Officer	\$45,800	\$25,500	\$71,300
School Police Officer, 10 Month	\$40,700	\$23,800	\$64,500
Science Lab Assistant	\$43,300	\$23,600	\$66,900
Secretary (10 Mos)	\$36,100	\$23,100	\$59,200
Secretary III (10 Mos)	\$41,400	\$24,200	\$65,600
Secretary III (12 Mos)	\$53,800	\$26,800	\$80,600
Executive Secretary	\$56,500	\$27,600	\$84,100
Social Worker	\$51,800	\$26,000	\$77,800
Supportive Services Assistant 3 Hours	\$8,200	\$6,400	\$14,600
Supportive Services Assistant 4 Hours	\$10,800	\$7,100	\$17,900
Teacher	\$68,700	\$30,800	\$99,500



**MATRIX OF POSITIONS AND SALARIES**  
MIDDLE SCHOOL EDUCATION

<b>POSITIONS</b>	<b>2012-2013 AVERAGE SALARY</b>	<b>FRINGE BENEFITS</b>	<b>TOTAL SALARY &amp; BENEFITS</b>
Assistant Principal	\$104,500	\$41,100	\$145,600
Assistant Principal - 12 Months	\$118,100	\$43,900	\$162,000
Auxiliary Teacher	\$34,900	\$24,500	\$59,400
Bilingual Counseling Assistant	\$32,200	\$21,300	\$53,500
Classroom Assistant	\$27,700	\$21,200	\$48,900
Climate Support Assistant	\$40,600	\$24,200	\$64,800
Community Relations Liaison	\$39,500	\$29,700	\$69,200
Computer Lab Assistant	\$43,300	\$23,600	\$66,900
Conflict Resolution Specialist	\$32,700	\$23,200	\$55,900
Counselor	\$70,300	\$31,200	\$101,500
Department Head	\$93,400	\$35,800	\$129,200
Health Room Technician	\$8,700	\$6,500	\$15,200
Instructor, JROTC	\$70,998	\$38,228	\$109,226
Librarian	\$70,300	\$31,200	\$101,500
Library Instructional Materials Asst	\$32,700	\$22,300	\$55,000
Non Teaching Assistant	\$40,300	\$24,100	\$64,400
Noon Time Aide (One Hour Daily)	\$2,000	\$600	\$2,600
Noon Time Aide 3 Hrs	\$6,000	\$1,800	\$7,800
Noon Time Aide 3.5 Hrs	\$7,000	\$2,100	\$9,100
Noon Time Aide 4Hrs	\$8,000	\$2,400	\$10,400
Noon Time Aide 4.5 Hrs	\$9,000	\$2,700	\$11,700
Noon Time Aide 5 Hrs	\$10,000	\$3,000	\$13,000
Nurse	\$77,500	\$31,700	\$109,200
Principal, 10 Months	\$108,600	\$42,600	\$151,200
Principal, 12 Months	\$133,400	\$46,800	\$180,200
School Aide II	\$28,900	\$20,200	\$49,100
School Improvement Support Liaison	\$42,400	\$30,600	\$73,000
School Operations Officer	\$45,800	\$25,400	\$71,200
School Police Officer, 10 Month	\$40,700	\$23,800	\$64,500
Science Lab Assistant	\$43,300	\$23,600	\$66,900
Secretary (10 Mos)	\$34,600	\$22,800	\$57,400
Secretary III (10 Mos)	\$43,000	\$25,400	\$68,400
Secretary III (12 Mos)	\$53,800	\$26,800	\$80,600
Social Worker	\$51,800	\$26,000	\$77,800
Supportive Services Assistant 3 Hours	\$8,200	\$6,400	\$14,600
Supportive Services Assistant 4 Hours	\$10,800	\$7,100	\$17,900
Teacher	\$70,300	\$31,200	\$101,500
Technical Maintenance Specialist	\$48,300	\$25,900	\$74,200

**POSITION MATRIX OF SALARY AND BENEFIT COSTS**  
**SENIOR AND AREA VOCATIONAL TECHNICAL HIGH SCHOOLS**

<b>POSITIONS</b>	<b>2012-2013 AVERAGE SALARY</b>	<b>FRINGE BENEFITS</b>	<b>TOTAL SALARY &amp; BENEFITS</b>
Agricultural Mechanic/Stock Clerk	\$47,300	\$25,600	\$72,900
Assistant Principal	\$106,000	\$40,500	\$146,500
Assistant Principal - 12 Months	\$118,100	\$44,000	\$162,100
Auxiliary Teacher	\$34,900	\$24,500	\$59,400
Bilingual Counseling Assistant	\$32,200	\$21,300	\$53,500
Classroom Assistant	\$27,700	\$21,200	\$48,900
Climate Support Assistant	\$40,600	\$24,200	\$64,800
Community Relations Liaison	\$39,500	\$29,700	\$69,200
Computer Lab Assistant	\$43,300	\$24,800	\$68,100
Conflict Resolution Specialist	\$32,700	\$20,800	\$53,500
Counselor	\$70,300	\$31,200	\$101,500
Department Head	\$93,400	\$35,800	\$129,200
Farmer	\$44,800	\$25,100	\$69,900
Health Room Technician	\$8,700	\$6,500	\$15,200
Instructor, JROTC	\$70,998	\$38,228	\$109,226
Librarian	\$70,300	\$31,200	\$101,500
Library Instructional Materials Asst	\$32,700	\$22,600	\$55,300
Non Teaching Assistant	\$41,500	\$24,200	\$65,700
Noon Time Aide (One Hour Daily)	\$2,000	\$600	\$2,600
Noon Time Aide 3 Hrs	\$6,000	\$1,800	\$7,800
Noon Time Aide 3.5 Hrs	\$7,000	\$2,100	\$9,100
Noon Time Aide 4Hrs	\$8,000	\$2,400	\$10,400
Noon Time Aide 4.5 Hrs	\$9,000	\$2,700	\$11,700
Noon Time Aide 5 Hrs	\$10,000	\$3,000	\$13,000
Nurse	\$77,500	\$31,700	\$109,200
Principal, 10 months	\$117,000	\$43,700	\$160,700
Principal, 12 months	\$138,100	\$47,900	\$186,000
School Aide II	\$28,900	\$20,900	\$49,800
School Improvement Support Liaison	\$42,400	\$30,600	\$73,000
School Operations Officer	\$45,800	\$25,700	\$71,500
School Police Officer, 10 Month	\$40,700	\$23,800	\$64,500
Science Lab Assistant	\$43,300	\$24,800	\$68,100
Secretary (10 mos)	\$37,000	\$23,200	\$60,200
Secretary I, 12 Mos	\$48,000	\$24,300	\$72,300
Secretary III, 10 Mos	\$46,900	\$25,700	\$72,600
Secretary III, 12 Mos	\$53,800	\$26,800	\$80,600
Shop Training Assistant	\$27,100	\$21,900	\$49,000
Social Worker	\$51,800	\$25,600	\$77,400
Stock Clerk	\$37,400	\$23,200	\$60,600
Support Services Assist - 3 Hr	\$8,200	\$6,400	\$14,600
Support Services Assist - 4 Hr	\$10,800	\$7,100	\$17,900
Teacher	\$70,300	\$31,200	\$101,500
Teacher Assistant - Comp. Science	\$38,300	\$23,600	\$61,900



**Appendix G: FY12-13 Schedule of Hourly Rates**

	<b>Per Diem (Daily)</b>	<b>**EC</b>	<b>OT</b>	<b>Prof Dev</b>
Teacher		\$51.26		
Noon Aides/Bus Monitor		\$13.53		
Principal/Assistant Principal				\$70.26
Professional Development Leader - Teachers Only				\$62.82
Teacher Participant				\$37.87
Teacher - Prof Develop Planning				\$51.26
Classroom Assistant				\$24.32
Supportive Services Assistant				\$17.28
NTA			\$37.02	
School Police			\$46.68	
Secretary I, II			\$32.48	
Secretary III			\$41.17	
Secretary III (12 Months)			\$47.23	
School Operations Officer			\$40.20	
Librarian		\$51.26		
LIMA			\$28.70	
Per Diem Sub/Retired Teacher Extra Service	\$205.85			
Per Diem Sub Teacher (AESOP)/Tchr Liaison (Master's)	\$276.68			
Retired Principal/Asst Principal	\$553.38			
Retired Secretary	\$78.11			
Teacher		\$51.26		
<b><u>Paraprofessional</u></b>				
Classroom Assistant			\$24.32	
Bilingual Counseling Assistant			\$28.27	
School Aide II			\$25.37	
Community Relations Liaison			\$34.67	
Lab Assistant			\$38.01	
Classroom Assistant			\$24.32	



**Appendix H: FY12-13 Grant Funds in School Budgets**

**General Guidelines**

- All grants are to follow all School District of Philadelphia policies and procedures.
- All grants may be used only for expenditures that are part of a budget approved by the grant-maker.
  - No significant deviation from an approved budget may occur without prior, written approval from the funder.
  - Significant deviation is usually defined as a change of more than 10% to any single line item.
- All Federal grants must adhere to basic Federal fiscal regulations, principles and guidelines, including "Reasonable, Necessary and Allocable."
- All grants to the District or any of its schools totaling more than \$5,000 must be authorized in a resolution approved by the School Reform Commission;
  - Grants of \$5,000 or less, in lieu of a separate SRC resolution, schools must notify the Chief Financial Office by means of a memorandum.
  - Grants of \$5,000 or less will be reviewed on a case-by-case basis to determine whether they should be managed via Advantage (paying staff or contracting with a vendor) or via individual school's student activities fund.
- Grant managers are responsible for maintaining orderly records of grant-funded activities, and for submitting all required reports to funders.
  - If a required report includes financial information, the report must be completed in collaboration with the Office of Management and Budget.

**Grant Funds**

Fund Prefix	Fund Name	Fund Description	Analyst
242	<b>IDEA, Part B Grant</b>	Funds are to be used to improve the quality of special education services provided to children with disabilities with an emphasis on meeting the needs of minorities with disabilities, improving personnel recruitment and retention and advancing early intervention services for pre-school children. IDEA funds are used by the district to fund activities such as the coordination of early intervention services for eligible children over five years old, an extended day program for students with special needs, classroom assistants for special education classes, professional development, material and supplies and emotional support services.	Halina Jakubowska

<b>Fund Prefix</b>	<b>Fund Name</b>	<b>Fund Description</b>	<b>Analyst</b>
246	<b>JROTC/CAR Academy Instruction Grant</b>	Grant funds are to be used to implement Junior Reserve Officer Training Corp (JROTC) programs to promote patriotism, develop informed and responsible citizens, develop respect for constituted authority and develop a high degree of personal honor, self respect, individual discipline and leadership. The school district uses funds to implement JROTC after school and summer enrichment programs for at-risk students.	Halina Jakubowska
270	<b>Perkins Vocational Education Grant</b>	Grant Funds are to be used to upgrade -approved Career and Technical Education (CTE) Programs of Study (POS). The funds will ensure that the CTE POS are in compliance with both state (Chapter 339) and federal (Perkins IV) standards and guidelines. The expectation is that students will be better prepared for post-high education and careers. The District uses these funds to support Career and Technical Education (CTE) Programs of Study (POS) that serve high concentrations of special students.	Anthony Pane
201	<b>Title I, Part A – Basic Grant</b>	Funds are to be used to provide supplementary educational services, especially in reading/language arts and math, to students who are educationally disadvantaged or at risk of failing to meet state requirements. The school district uses Title I funds for school-wide programs that create an overall plan for school improvement. Funds are used to strengthen the core academic program and improve student achievement. Some District-wide programs (such as the Empowerment School initiative) are funded from off-the-top Title I funds.	Barbra Bell/ Bory Sou
206	<b>Title I, School Improvement Funds</b>	Funds must be used for those activities that will most directly impact and increase student achievement and bring the school out of School Improvement status. The schools should follow the Title I, Part A guidelines when considering how to allocate Title I School Improvement Funds (please see Appendix I.) However, Title I School Improvement Funds do not have professional development or parental involvement set asides.	Barbra Bell
334	<b>Title II, Part A - Improving Teacher Quality Grant</b>	Funds are to be used to prepare, train, and recruit high-quality teachers and principals capable of ensuring increased academic achievement for all students. The district uses funding to provide in-service and retraining for teacher-leaders and support staff through workshops, conferences, higher education credits and professional development sessions in elementary, middle and high schools the areas of math and science. The District also uses funding to provide Reduced Class Size teachers to schools to avoid split grade classes.	Halina Jakubowska
237	<b>Title III – Language Instruction for Limited English Proficient and Immigrant Students</b>	Funds are used to help students who have a primary language other than English attain English proficiency and to meet the State academic content and achievement standards. Funds are also used to develop language instruction educational programs. Grant expenditures must be supplemental to the basic program and cannot supplant other funds.	Bory Sou

## **Appendix I: Title I Guidelines**

Title I is a federal grant. The purpose of this grant is to ensure that all children have a fair, equal and significant opportunity to obtain a high quality education and reach the State's challenging academic standards, particularly in reading, math and science. The focus of Title I is on ACADEMIC SUPPORTS, specifically,

- meeting the needs of low-achieving children
- closing the achievement gap.

There are several principles that regulate the use of Title I grant funds including **supplement not supplant** and the cost principles of **necessary, reasonable, and allocable** (OMB Circular A-87 as codified in 2 CFR Part 225).

**Supplement not supplant** refers to Title I's role in purchasing supplementary resources to upgrade the instructional program. The District and our schools must use state and local (non-grant) funds to meet the basic requirement of enrollment driven/allotted teachers, textbooks and related materials in order to provide a core instructional program and to meet all district, state and federal mandates Title I can then be used to purchase *additional* academic supports that can be layered on top of the requirements to "enhance" instruction and increase student achievement. To test for **supplement not supplant**, consider this question, "*If all purchases made with federal funds were pulled out of the building tomorrow, would there still be a compliant program?*"

Title I purchases must be data driven and the focus should be on meeting the instructional needs of the lowest achieving students. All Title I purchases must be fully addressed in the Comprehensive Planning Document and the Federal Budget Addendum (see Appendix J). In fact, the school's Comprehensive Planning Document and the associated Federal Budget Addendum is a compliance document. If a purchase is mentioned in these documents, you must be implementing that purchase. If you are implementing a program using Title I funds, it must be referenced in these documents.

In addition to **supplement not supplant**, all Title I purchases must adhere to the cost principles of **necessary, reasonable and allocable**. To test your purchases against these principles, consider the following.

### **Necessary**

- Do we really need this to implement our Action Plans and increase student achievement and close the achievement gap? Will this expenditure help move our instructional program forward?
- Is this the minimum amount that I need to spend to meet the need?

### **Reasonable**

- Do we have the capacity to use what we are purchasing in the current fiscal year?
- Did I pay a fair price and can I prove it?
- If asked to defend this purchase, would I feel comfortable?

### **Allocable**

- Is this purchase in proportion to the value received by the program?

For example, if 0.4 of a teacher's salary is being charged to Title I professional development, then that teacher must be providing professional development the equivalent of two full days, or twelve (12) periods, each week. If the teacher is only providing the equivalent of a half day of professional development each week, then only 0.1 of the teacher's salary is allocable to professional development and the other 0.3 is not.



Please remember that all Title I purchases must be in accordance with the District’s fiscal policies and procedures and require the appropriate documentation. Please consider documentation requirements (such as logs and schedules for personnel) before allocating funds. Your Grants Compliance Monitor (GCM) can answer any questions you may have in this regard.

Below is a sampling of some Title I Do’s and Don’ts.

<b><u>DO PURCHASE</u></b>	<b><u>DON’T PURCHASE</u></b>
<b>Basic Instruction</b>	<b>Basic Instruction</b>
Workbooks that supplement the textbook	Another text that will replace the District’s core textbook for a subject
An <i>additional</i> teacher to reduce class size	An additional teacher to replace an allotted teacher (required by contract or District policy and procedures) who has been moved out of the allotted slot and placed in another position such as department head or dean of students
<i>Instructional</i> paraprofessionals to work under the supervision of a highly qualified teacher to provide small group instruction and other academic supports <i>in core content areas only</i>	Noon time aides, NTAs, or SSAs who will not be working directly with students in core content areas (i.e. hallway, lunchroom, office and recess duties)
An <i>additional</i> prep teacher to create common planning time in elementary schools	Non core-subject teachers and Advanced Placement teachers in secondary/middle schools
A classroom set of computers and a printer for student use	Computers and printers for teacher and office use and general office supplies
Instructional equipment such as projectors, calculators and Smartboards	Facility upgrades or construction that may be required to install purchased equipment
Salaries for teachers and materials to implement an instructional, supplemental after school, Saturday, and summer program	Salaries for non instructional personnel working in a supplemental after school, Saturday, or summer program (for example: secretaries, school police, or paraprofessionals)
	Salaries for teachers and materials for a non-instructional after school program or club
	Non-instructional personnel, mandated items, furniture, transportation for students, site rental (other than opening the school site), entertainment, incentives, sports equipment, utilities charges, phone bills, stamps, cleaning products, food for staff and students, uniforms or clothing

**DO PURCHASE**

**Parent Involvement - Minimum 1% Set Aside**

Small amounts of food for parents for a Title I appropriate, pre-approved parent involvement activity such as a workshop or Title I meeting (with RSVPs, agendas, and sign ins). Per person amounts cannot exceed those in District policies pertaining to federal grants. Per District policy, cannot use Imprest Fund.

Materials for a make and take workshop

Part time salaries for teachers to run workshops

Books for parents to support student achievement with training/workshops

Activities and manipulatives for parents to use at home with their children, with associated training

Travel for parents to attend Title I allowable conferences, with a plan for turnaround training

Printing (via the District's Office of Print Services) parent newsletters, *with GCM approval*

Mailing costs for Title I parent communications (through District's mail—do not purchase stamps), *with GCM approval*

Contracts for speakers to provide Title I allowable workshops for parents when school based and district resources are not available

**\*\* Change from '11-12**

**The School District of Philadelphia can no longer implement the Parent Scholar Program at any school location(s).**

**DON'T PURCHASE**

**Parent Involvement - Minimum 1% Set Aside**

Clearances for parent volunteers

Food and programs for banquets, assemblies, graduations, and community events

Brochures/books/ materials not directly linked to supporting instruction and student achievement

Incentives and gifts for parents

Mailing costs for non-Title I allowable parent communications and any communication that must occur in the absence of Title I funds (consult GCM)

**DO PURCHASE**

**Professional Development - Minimum 5% (not in School Improvement) or 10% (in School Improvement or Warning at time of budget process) based on the school's needs assessment**

*Note:* Not all professional development is Title I professional development. Title I professional development must address those areas in which a school does not make AYP and must be in a core content area based on the school's needs assessment.

*Institutional* memberships to professional organizations such as ASCD, NCTM, NCTE

Literature for teachers and instructional staff on improving student achievement and teaching

Salaries for after school or Saturday professional development

Note: Teachers can only be paid for actual participation in professional development activities, those activities that are planned to improve the practice of teaching. They cannot be paid professional development salaries for preparation (these people are paid the leadership rate to account for this).

Substitute services to relieve teachers who will attend professional development

Contracts for vendors to provide Title I allowable professional development when school-based or district resources are not available

Travel to conferences with an instructional focus for teachers in core content areas and administrators, with a turnaround plan. (District approval still required)

**DON'T PURCHASE**

**Professional Development - Minimum 5% (not in School Improvement) or 10% (in School Improvement or Warning at time of budget process)**

Meetings are NOT considered Title I professional development.

*Individual* memberships to professional organizations

The student materials that are linked to required professional development

Equipment and supplies

Salaries or portions of salaries for organizational, climate, **test coordinator**, dean and other administrative responsibilities

Professional Development on topics such as: bullying, classroom management, CPR, climate and mandated components of the core curriculum and other programs such as Gradebook, etc.

## Appendix J: Federal Budget Addendum

### **Budget Plan: Federal Addendum to the School Improvement Plan**

**Purpose:** This is the Federal Budget Addendum to the School Improvement Plan. While utilizing the Pennsylvania Department of Education’s (PDEs) Comprehensive Planning Document will meet most of the Federal Schoolwide and School Improvement requirements, it is still necessary to fully address those fiscal components. This is critical and allows our schools to complete biannual time certifications for time and effort documentation. This is crucial to remaining compliant.

**Directions:** For each funding source, list the item(s)/position(s) to be purchased and the budgeted amount. Please note that it may be necessary to add rows to list additional purchases. **For school-based operating and grant funded purchases, you must also list the purpose of the purchase and which “High Priority Systemic Challenge” and “Action Step” identified in your School Improvement Plan (SIP) the purchase addresses.** (In the *Comprehensive Planning: School Level Planning Offline Guidance Tool*, see page 25 on Systemic Challenges, pages 27-30 for Action Steps.) *All grant purchases MUST be data driven and in alignment to the School Improvement Plan. Materials budgeted for 2012-2013 should be purchased to support the needs of the FY 2013 school year.*

**THIS DOCUMENT MUST BE SUBMITTED TO YOUR GRANTS COMPLIANCE MONITOR PRIOR TO FINALIZING YOUR SCHOOL BUDGET IN SMS.**

**Note: High Schools** offering interventions (Corrective Reading/Corrective Math, Achieve 3000, Study Island, etc.) that will give students grades or pass-fail credits must assign a highly qualified teacher for these classes; that is, the teachers’ certifications must match the subjects for which they will give the credit. Please note any personnel being purchased to support these programs.

List your top 4 “High Priority Systemic Challenges” from your School Improvement Plan:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

**I. OPERATING BUDGET** (Include all purchases, including ESOL, Special Education, books/supplies, extra nursing, etc.)

Note: Even though this is a *Federal Budget Addendum*, Operating funds must be included since all schools are Title I Schoolwide Programs.

<i>Item (or staff) to be purchased</i>	<i># of positions</i>	<i>Budgeted Amount</i>	<i>High Priority Systemic Challenge from SIP</i>	<i>Action Step Description from the SIP</i>	<i>Comments</i>
Enrollment Driven Teachers			n/a*	n/a	
Principal			n/a*	n/a	
Secretary			n/a*	n/a	
Counselor					
LIMA/Librarian					

**II. TITLE I**

*As required by “Assurance 8” in the School Improvement Plan, all schools must have a plan to extend instructional time before school, after school, during the summer, and/or as an extension of the school year. Please briefly describe your plan to meet this requirement and the funding source.*

**A. TITLE I BASIC INSTRUCTION FUNDS:**

**Supplemental Teachers**

<i>Number of positions</i>	<i>Type of teacher (grade, core subject, etc.)</i>	<i>Supplemental purpose (Reduced Class Size teacher, intervention teacher, Teacher Leader, Kindergarten, supplemental prep teacher in elementary schools, etc.)</i>	<i>Comments (split-funded positions indicate other source)</i>	<i>High Priority Systemic Challenge from SIP</i>	<i>Action Step Description from the SIP</i>

**Instructional Paraprofessionals:**

<i>Number of positions</i>	<i>Type of position (SSA, Classroom Asst, etc.)</i>	<i>Supplemental purpose</i>	<i>Provide grade(s)/core content area(s) in which these positions will provide instructional support. (State name of supervising teacher, if possible)</i>	<i>High Priority Systemic Challenge from SIP</i>	<i>Action Step Description from the SIP</i>

**Other Title I Basic Expenditures (Be Specific):**

<i>Type of expenditure</i>	<i>Item to be purchased</i>	<i>Supplemental purpose</i>	<i>Budget Amount</i>	<i>High Priority Systemic Challenge from SIP</i>	<i>Action Step Description from the SIP</i>
Instructional Equipment (unit cost >\$1500) (Example: Student Computers, Smart Boards)					
Allowable materials to support instructional program (Name specific purchases. E.g., calculators, Study Island...)					
Supplemental instructional books for 12-13 (Name supplemental consumable workbooks, library or classroom books)					
Title I EC funds for supplemental student instruction in core areas (after school, Saturday, etc.)					
Contracts / LCAs– for vendors working with students to improve student achievement in core areas					
Other – Be Specific					



**B. TITLE I PROFESSIONAL DEVELOPMENT FUNDS (5% or 10% of Title I Funds):**

**Teachers/Staff**

<i>Percentage of position (.4 or less)</i>	<i>Position Title-School Based Teacher Leader</i>	<i>PD activities this person will facilitate –include number of PD periods weekly for which staff will maintain LOGS</i>	<i>High Priority Systemic Challenge from SIP</i>	<i>Action Step Description from the SIP</i>

**Other Professional Development (PD) Expenditures:**

<i>Expenditure</i>	<i>Amount Budgeted</i>	<i>Purpose</i>	<i>Comments/Turnaround plan</i>	<i>High Priority Systemic Challenge from SIP</i>	<i>Action Step Description from the SIP</i>
Part-time staff salaries for PD in core areas (tsd/tld for afterschool, Saturday, etc.)					
PD contracts/LCAs – include turnaround plan					
Travel/Conferences-include turnaround plan					
PD books/materials (specify focus of PD topics aligned to core content area)					

**C. TITLE I PARENTAL INVOLVEMENT FUNDS (1% set-aside of Title I funds):**

**Full Time Personnel**

<i>Number of positions</i>	<i>Position type Circle one- CRL SCC</i>	<i>Purpose</i>	<i>Comments</i>	<i>High Priority Systemic Challenge from SIP</i>	<i>Action Step Description from the SIP</i>

**Other Parent Involvement Expenditures**

<i>Expenditure</i>	<i>Item to be purchased</i>	<i>Purpose of item</i>	<i>Amount Budgeted</i>	<i>Comments</i>	<i>High Priority Systemic Challenge from SIP</i>	<i>Action Step Description from the SIP</i>
Instructional materials for Title I appropriate workshops/meetings						
Food for Title I appropriate workshops/meetings						
Contracts/LCAs– working with parents						
Attendance at parent conferences – include plans for follow-up						
Books and Materials for Parents to use at home with their children- to be accompanied by training						
Printing/Postage for Title I allowable parent documents/correspondence through District offices						
Other – Be Specific						

**III. SCHOOL IMPROVEMENT FUNDS**

(IF APPLICABLE- FORMULA GRANT BASED ON 2011-2012 SCHOOL IMPROVEMENT STATUS)

<i>Item/Staff to be purchased</i>	<i>Purpose of the Purchase</i>	<i>Budgeted Amount</i>	<i>Comments (Include purpose of purchase, student groups impacted)</i>	<i>High Priority Systemic Challenge from SIP</i>	<i>Action Step Description from the SIP</i>

**IV. ADDITIONAL GRANTS**

Please list any **additional grants** in your building and the plan for purchases and expenditures from these grants (exceptions: IDEA-B, ROTC, DOL). Examples include SSIG, SLC, Perkins, GEAR Up, etc. Add more lines, if necessary.

1. Name of Grant: _____	Planned expenditures (including staff):
2. Name of Grant: _____	Planned expenditures (including staff):
3. Name of Grant: _____	Planned expenditures (including staff):
4. Name of Grant: _____	Planned expenditures (including staff):
5. Name of Grant: _____	Planned expenditures (including staff):

**Please attach copies of agendas and sign ins from parent meetings held for input into the**  
**1) School Improvement Plan**  
**2) Budget**

\_\_\_\_\_  
PRINCIPAL’S SIGNATURE

\_\_\_\_\_  
GCM SIGNATURE

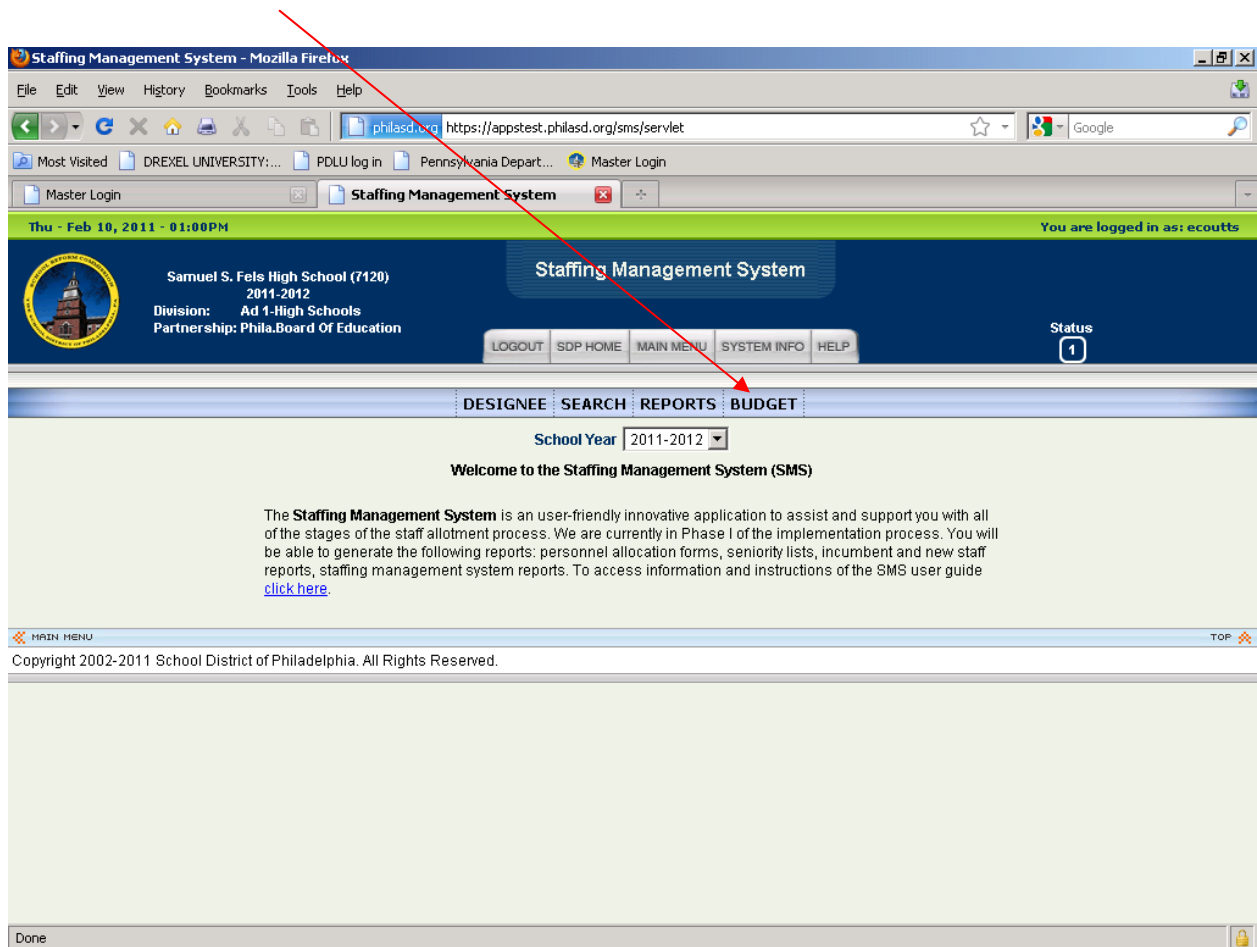
\_\_\_\_\_  
DATE



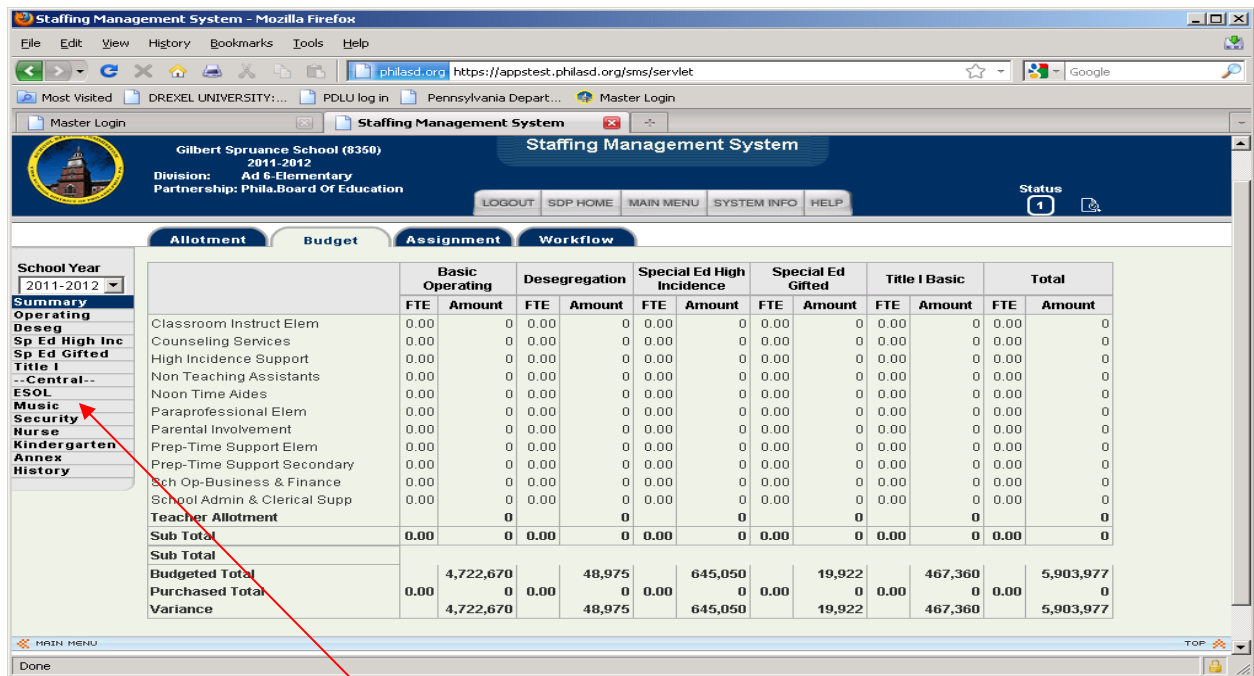
## Appendix K: Tips for Using the Staffing Management System (SMS)

### Getting Started

1. Enter the School District Website: **www:philasd.org**
2. Select “**Login**” to enter the District’s Web applications.
3. Log in using your District username and password
5. Launch the Staffing Management System (SMS) application
6. Click on “**BUDGET**” in the light blue strip, below the Main Tabs



7. SMS defaults to the “Summary” screen, which shows total dollars in all budgets.



Below the “Summary” selection, find the name of the funding source you want to work with to begin the budget development process.

## General Information

1. SMS defaults back to the “Summary” page when you open or close the application.
2. Every Budget Form is linked to the Personnel Allotment; therefore, a position purchased on any budget form automatically updates the Personnel Allotment form.
3. The method for selecting, adding, changing, saving, canceling, submitting, and rejecting a form is the same for all forms.
4. If changes were entered without selecting the “save” or “add” button, the “Cancel” button will take you back to the last saved data.
5. All Budget Forms are programmed to ensure that total purchases equal total dollars allocated to a school. An error message will appear if you are over or under budget.
6. The \$100 per Teacher allocation is automatically calculated on every form for every Teacher position selected.

## Functional Selections on the Budget Form

1. Error messages appear in red in this section of the form.

Print Report

The screenshot shows the Staffing Management System (SMS) interface. At the top, there's a navigation bar with tabs for Allotment, Budget, Assignment, and Workflow. The main content area is divided into sections. On the left, there's a sidebar with a 'School Year' dropdown set to 2011-2012 and a 'Summary' section. The main area displays a summary for 'Special Ed High Incidence' with a budgeted total of 1,278,250. Below this is a table for 'Full-Time Positions - Activity' and 'Non Full-Time Purchases - Activity'. A 'Full-Time Position Selections' table is visible, listing positions like 'Mentally, Physically Impaired, Lrn Dis' with columns for 10-11, 11-12, Cost, and Total. Buttons for Save, Cancel, Submit, and Reject are present. A 'Print Report' button is located in the top right corner. An arrow points from the 'Print Report' button to the 'Special Ed High Incidence' summary section.

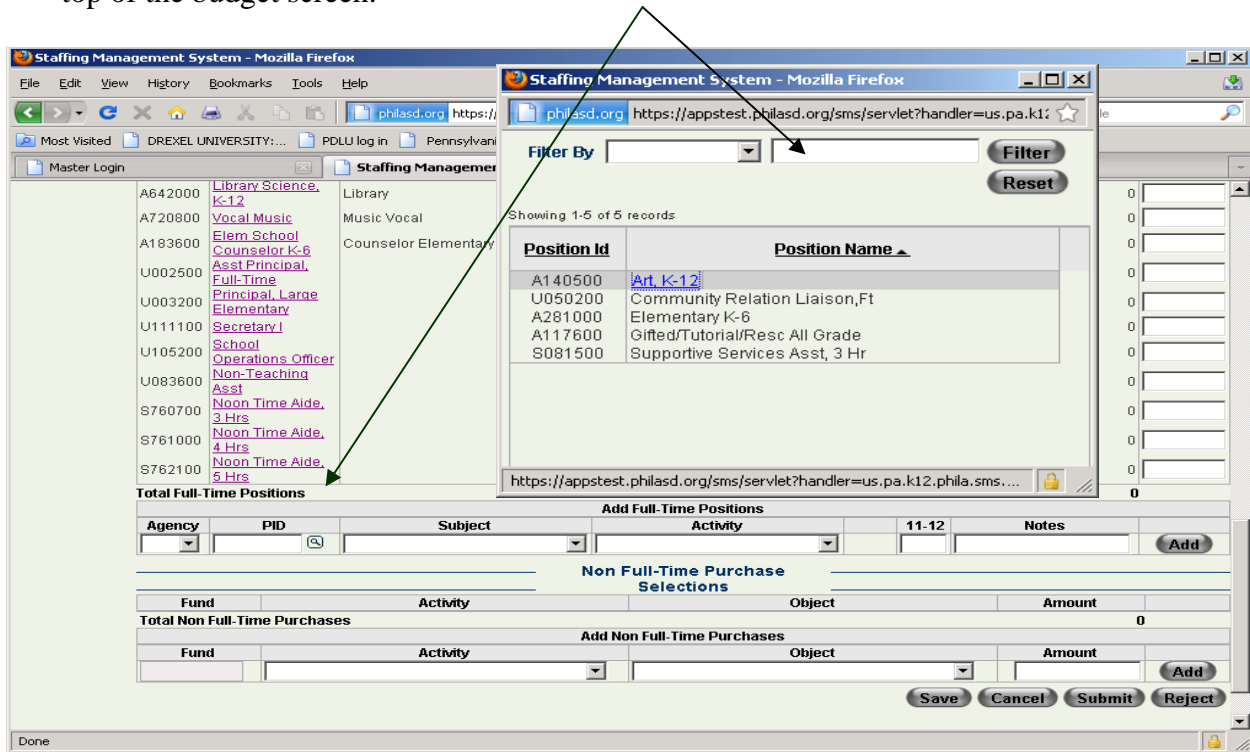
7. Click **“Save”** as often as possible and always before exiting a form.
8. Select **“Cancel”** to return to the last saved and added data.
9. Select **“Submit”** once on any form after the final review to approve all forms. This year, Principals will not be submitting until their scheduled budget review.
10. **“Reject”** is only for OMB, SRS, and Academic Division Approval Levels.

## Full-Time Position Selection

1. Prior year positions will automatically populate as the grayed area.
2. Enter new school year position allocation in the blank white area of this section. Total allocation selections should not exceed allocated dollars.
3. Notes column is available to indicate special circumstances.
4. A complete listing of position ID numbers is available through the Help tab on SMS.



- The PID pop up menu appears when you enter the Agency code (the 3-digit School Number) and click on the magnifying glass icon next to the PID box. Select the correct PID from the drop down list. If you are unsure about a PID, go to the Allotment or Assignment Tab at the top of the budget screen.



- To add a full - time position, enter the Agency, PID, Subject, and Activity using the dropdown menus. You must select PID before the system will allow you to select the Activity and Subject.
- Put in the number of positions you are purchasing. Positions can be purchased in whole numbers or in decimals. If you are split-funding a position, it is recommended that you use the Notes section to indicate the other funding source.
- When you are finished entering the information, click “**Add**” to add the position.
- Positions included in the PID drop down menu will automatically populate under the Full-Time position area.
- PIDs will only appear for your school if you have had the position in the past. **If a desired position is not in the PID drop down menu, contact Penny McClay (plmclay@philasd.org), and the position will be added to your school’s SMS application within approximately 24 hours.**
- Please be sure to have all positions added **prior** to coming to the budget review process so that your budget can be approved at the close of your review.

## Non Full-Time Purchases

1. Unlike Full-Time Positions, your supplemental purchases from last year are not listed. You **MUST** add to them to each budget form.
2. Examples of Non Full-Time (NFT) purchases include the following:
  - Per Diem
  - Extra-Curricular
  - Summer Reorganization
  - Overtime
  - Professional Development (Title I only)
  - Parent Food (Title I only)
  - Contracted Services
  - Materials/ Supplies, Books/ Instructional Aids, Equipment
3. To enter a Non Full-Time position, select the **ACTIVITY** drop down menu and choose the correct Activity.

The screenshot displays the Staffing Management System interface. At the top, there is a table of full-time positions with columns for Agency, PID, Subject, Activity, and Amount. Below this table, there are sections for adding full-time and non-full-time purchases. The 'Non Full-Time Purchase Selections' section is highlighted, and an arrow points to the 'Activity' dropdown menu, which is open, showing a list of activities including 'Classroom Instruct Elem', 'Ec - School Activity', 'Educational Technology', 'Libraries', 'Maintenance', 'Non Teaching Assistants', 'Noon Time Aides', and 'Paraprofessional Elem'.

Agency	PID	Subject	Activity	11-12	Notes
U002500		Counselor K-6	Counseling Services	2.00	0.00
U002500		Asst Principal, Full-Time	School Admin & Clerical Supp	0.00	0.00
U003200		Principal, Large Elementary	School Admin & Clerical Supp	0.00	0.00
U111100		Secretary I	School Admin & Clerical Supp	2.00	0.00
U105200		School Operations Officer	Sch Op-Business & Finance	1.00	0.00
U083600		Asst Non-Teaching	Non Teaching Assistants	1.00	0.00
S760700		Noon Time Aide, 3 Hrs	Noon Time Aides	0.00	0.00
S761000		Noon Time Aide, 4 Hrs	Noon Time Aides	0.00	0.00
S762100		Noon Time Aide, 5 Hrs	Noon Time Aides	0.00	0.00
<b>Total Full-Time Positions</b>				<b>51.10</b>	<b>0.00</b>

**Non Full-Time Purchase Selections**

Fund	Activity	Object	Amount	
<b>Total Non Full-Time Purchases</b>				<b>0</b>

4. Select the **OBJECT** drop down menu and choose the correct Object.
5. Type in the purchase amount, then click on “Add” to add your purchase. Purchases will be listed in the “Non Full-Time Purchase Selections” part of the form.
6. Contractual extra curricular time (elementary schools only) must be entered on the Operating Budget form. The minimum dollar amount is provided at the top of the Operating Budget page. To determine the number of hours that have been budgeted for Contractual Extra Curricular, divide the total dollar amount entered by the Teacher EC rate provided in Appendix G.

7. For all other Extra Curricular, Professional Development, Overtime and Per Diem Services, please use the rates provided in Appendix G to determine how much to budget for each position.
8. Changing or deleting a NFT purchase: once a NFT purchase is added and listed in the “Non Full-Time Purchase Selections” part of the form, you cannot change Fund/ Activity/ Object; you can only change the dollar amount. If the same purchase is added, the added line will replace the existing purchase. To change the Fund/ Agency/ Object, add a new line using the same procedure used to make a new NFT purchase. To delete a NFT line, put a **“0”** in the amount box.

### **Using the Title I Form**

1. Title I Minimum Set Asides (Parental Involvement and Professional Development) are listed at the top of the Title I form and an error message will appear in red until your **minimum** Set Asides have been met.
2. If 100% of a position is used for Classroom Instruction or Parental Involvement, use the Activity Drop Down menu to indicate this.
3. When entering a Title I teaching position that is both Professional Development and Classroom Instruction (Literacy Lead, Math Lead, etc.), the position must be entered into the system on two lines: one line for the Classroom Instructional Activity Code and one line for the Professional Development Activity Code. The position must be divided in decimal increments.
4. Please note that these positions are grade teachers and should be listed as Grade Teacher – Literacy or Math Lead.
5. **Example:** One Grade Teacher - Literacy Lead position would be listed on SMS as 0.8 Classroom Instruction, 0.2 Professional Development (or any other combination that has been approved in coordination with your Grants Compliance Monitor). Documentation forms for their PD activities would have to be maintained.

## Appendix L: Contact Information

### I. Office of Management and Budget

Main Number: 215-400-4510

Fax Numbers: 215-400-4511, 215-400-4512

#### School Area Budgets

<b>Name and Position</b>	<b>Telephone</b>	<b>E-mail</b>
Kathryn Jones, Senior Financial Analyst <i>Contact for Middle and High School budgets</i>	215-400-5455	kajones
Latanya Vicks, Financial Analyst <i>Contact for Elementary school budgets</i>	215-400-5746	lvicks
Sidney Jones, Budget Operations Assistant <i>Contact for EBARs and Prep Time Payback</i>	215-400-6648	sihjones

#### Grants

<b>Name and Position</b>	<b>Telephone</b>	<b>E-mail</b>
Bill Higgins, Principal Financial Analyst	215-400-5467	whiggins
Barry London, Principal Financial Analyst	215-400-5424	blondon
Mervyn Becker, Senior Financial Analyst	215-400-5495	mebecker
Delores Hawkins, Senior Financial Analyst	215-400-5441	dehawkins
Halina Jakubowska, Senior Financial Analyst	215-400-5443	hjakubowska
Anthony Pane, Senior Financial Analyst	215-400-5446	apane
Barbra Bell, Financial Analyst	215-400-5458	bpignatelli
Anthony Draper, Financial Analyst	215-400-5932	adraper
Elana Felberg, Financial Analyst	215-400-6527	efelberg
Roger Haynes, Financial Analyst	215-400-6680	rhaynes
Janifer Clayton, Financial Management Trainee	215-400-6837	jclayton2
Latona English, Financial Management Trainee	215-400-6385	lenglish
Denique Felder, Financial Management Trainee	215-400-6821	dfelder
Brittany Fields-Ford, Financial Mgmt Trainee	215-400-6842	bfieldsford
Ken Hassinger, Financial Management Trainee	215-400-5359	khassinger
Rikai Pittman, Financial Management Trainee	215-400-6839	rpittman2
Bory Sou, Financial Management Trainee	215-400-5904	bsou
Jesse Willgruber, Financial Management Trainee	215-400-5819	Jwillgruber
Gale Goodman, Budget Operations Assistant	215-400-6259	ggoodman

## II. Office of Grants Development and Compliance (OGDC)

Office of Grants Development: 215 400-4150

Office of Grants Compliance: 215 400-4220

OGDC Managing Your Grant Guide:

<http://webgui.phila.k12.pa.us/uploads/jn/sH/jnsHpYOC6BYuvAwX1xxcHw/Managing-Your-Grant-Guide.pdf>

## III. Offices that Allocate Resources to Schools

<b>Office:</b>	<u>Office of School Resource Support</u>		
<b>Resources:</b>	Regular Education Teachers and Prep Teachers; Class Size Reduction Teachers; Annex and 504 Accommodation		
<b>Contact:</b>	Thery McKinzie, Executive Director	215-400-5228	mckinzie
<b>Office:</b>	<u>Office of Specialized Instructional Services (OSIS)</u>		
<b>Resources:</b>	Special Education Staff (High Incidence and Low Incidence); Special Education materials and supplies; Special Education Liaisons (SELs)		
<b>Contacts:</b>	Linda Williams, Interim Deputy Chief	215-400-6088	lwilliams
<b>Office:</b>	<u>Office of Multilingual Curriculum and Programs</u>		
<b>Resources:</b>	ESL Teachers, Bilingual Teachers		
<b>Contact:</b>	Lucy Feria, Deputy Chief	215-400-4240	lrodrigu
<b>Office:</b>	<u>Office of Parent, Family, Community Engagement</u>		
<b>Resources:</b>	Bilingual Counselor Assistants		
<b>Contact:</b>	Claudia Averette, Deputy Chief	215-400-5623	caverette
<b>Office:</b>	<u>Counseling and Promotion Standards</u>		
<b>Resources:</b>	School-Based Social Services		
<b>Contact:</b>	Deborah James-Vance, Behavioral Health Dir	215-400-6049	dvjamesvance
<b>Office:</b>	<u>Office of Comprehensive Arts Education</u>		
<b>Resources:</b>	Itinerant Instrumental Music Teachers		
<b>Contact:</b>	Virginia Lam, Manager of Talent Centers	215-400-5974	vlam
<b>Office:</b>	<u>Office of Career and Technical Education</u>		
<b>Resources:</b>	CTE – Perkins Grant; Vocational Education Training		
<b>Contact:</b>	David Kipphut, Deputy	215-400-5984	dkipphut

**Office:** Early Childhood Education  
**Resources:** School Age Parents/ ELECT Program  
**Contacts:** Jenna Monley, Program Manager 215-400-5744 jmonley

**Office:** Curriculum, Instruction and Professional Development  
**Resources:** Accelerated Learning  
**Contacts:** Darienne Driver, Deputy Chief 215-400-4210 ddriver

**Office:** Student Health Services  
**Resources:** School Nurses  
**Contacts:** Tracey Williams, Director 215-400-4170 twilliams2

**Office:** Office of School Safety  
**Resources:** School Police Officers  
**Contact:** Brendan Lee, Executive Director, School Safety 215-400-6012 brlee

**Office:** Office of Student Discipline  
**Resources:** In-School Suspension  
**Contact:** Gregory Shannon, Deputy 215-400-4230 gshannon