

The School District of Philadelphia

# Guide to School Budgets 2015-2016



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## **INTRODUCTION**

This Guide to School Budgets is intended to provide School District of Philadelphia (SDP) principals, School Advisory Councils (SACs), and other stakeholders with useful information about the resources included in school budgets. It is also intended to ensure transparency in the budgeting process by providing stakeholders with information regarding the methodologies used by the District to allocate resources to schools. School budgets were developed based on FY16 revenue projections. Should actual revenues be higher or lower than projected, school budgets may need to be adjusted.

## **SCHOOL BUDGETS AND PRINCIPAL AUTONOMY**

SDP schools are allocated dollars and personnel in accordance with the resources outlined in this guide. In order to provide educators with the ability to adapt resources to meet students' needs, SDP principals have the autonomy to reallocate their **basic operating** dollar amounts for different purposes.<sup>1</sup> Centrally allocated positions and resources (e.g., special education teachers or multilingual specialists) may not be reallocated for other purposes. Additionally, schools can pool resources to share part-time positions (see Appendix A for more information on reallocating positions). It is strongly preferred that schools choosing to pool resources work with other schools within their learning network; the District will consider inter-network resource sharing on a case-by-case basis. All school budgets must be 1) aligned to the Comprehensive Planning Document; 2) developed in consultation with the school's SAC or commensurate stakeholder advisory group; 3) approved by the assistant superintendent overseeing the school; and 4) compliant with grant requirements as outlined in this document.

## **AVERAGE COSTS**

The majority of a school's budget is expended on employees' salaries. SDP uses an average cost method where schools are charged the average cost to the District for each staff position, rather than the actual cost of the specific employee.

Average cost for school positions is calculated using projected employee salary and benefits data grouped by title (e.g., principal, teacher). Salary data are generated from a download of actual SDP employees taken from the District's financial system. Owing to the salary freezes in effect for most SDP employees, most of the growth in average costs is a result of increases in benefits costs. An example of the calculation for teachers is shown below (see Appendix B for the full list of average costs and an explanation of the calculation methodology).

### **FY16 Average Teacher Cost – Operating Budget**

<b>Classification Group Name</b>	<b>Title Name</b>	<b>FTE</b>	<b>Salary Amount</b>	<b>Benefit Amount</b>	<b>Salary and Benefits Total</b>
Teacher	Department Chair, Phys Ed	1.00	\$85,719	\$53,031	\$138,750
Teacher	School Counselor, 10 Months	210.70	\$15,961,757	\$10,310,547	\$26,272,304
Teacher	Teacher, Demonstration	78.80	\$6,305,159	\$3,992,151	\$10,297,310
Teacher	Teacher, Demonstrat, Spec Ed	22.91	\$1,776,855	\$1,137,291	\$2,914,146
Teacher	Teacher, Full time	5,459.89	\$386,263,435	\$255,641,996	\$641,905,430
Teacher	Teacher, Spec Education	1,337.97	\$91,803,962	\$61,450,143	\$153,254,105
	<b>FY16 Projected</b>	<b>7,111.27</b>	<b>\$502,196,887</b>	<b>\$332,585,158</b>	<b>\$834,782,045</b>
	<b>Average Cost (Rounded)</b>		<b>\$70,600</b>	<b>\$46,800</b>	<b>\$117,400</b>

<sup>1</sup> Summer Reorganization funding cannot be reallocated for other purposes. Additional information regarding use of Summer Reorganization funding is provided on page 2 of this document.

## **BASIC OPERATING BUDGETS**

The table below details the resources that constitute a school's basic operating budget.

<b>Position/ Resource</b>	<b>Allocation Method</b>	
<b>Teachers</b>	Schools are allotted a sufficient number of regular education teachers to meet specified class size limits and to provide prep time for each teacher. Special education teachers are allocated separately, as detailed in the Centrally Allocated Resources section of this document. Class size limits are as follows: Grades K-3: 30 students Grades 4-12: 33 students Career and Technical Education Schools: 24 students See page 3 for additional details on the teacher formulas for each school level. Kindergarten teachers are entirely funded by grants in FY16.	
<b>Principal</b>	One principal per school	
<b>Assistant Principals</b>	0-699 students: No assistant principal 700-1,349 students: One assistant principal 1,350-1,999 students: Two assistant principals	2,000-2,649: Three assistant principals Over 2,649 students: Four assistant principals
<b>Counselors</b>	<i>Elementary and Middle Schools</i> 0-524 students: 0.5 counselor 525-949 students: One counselor Over 949 students: Two counselors	<i>High Schools</i> 0-949 students: One counselor 950-1,599 students: Two counselors 1,600-2,249 students: Three counselors Over 2,249 students: Four counselors
<b>Secretaries</b>	0-1,149 students: One secretary 1,150-2,249 students: Two secretaries Over 2,249 students: Three secretaries	
<b>Noon Time Aides (3 hour)</b>	0-299 students: Two noon-time aides 300-449 students: Three noon-time aides 450-599 students: Four noon-time aides 600-749 students: Five noon-time aides 750-949 students: Six noon-time aides  Additional noon-time aides are provided to schools operating more than one building: Two buildings: Two noon-time aides Three buildings: Four noon-time aides	950-1,249 students: Seven noon-time aides 1,250-1,599 students: Eight noon-time aides 1,600-1,999 students: Ten noon-time aides Over 1,999 students: Twelve noon-time aides
<b>\$100 Teacher Allotment</b>	\$100 per teacher and counselor	
<b>Summer Reorganization</b>	Schools must pay staff for a specific number of days of Summer Registration/Reorganization. <sup>2</sup>  <i>Elementary Schools</i> 10 days for secretaries (daily rate=\$254.18)  <i>Middle and High Schools</i> 10 days for secretaries (daily rate=\$254.18) 10 days for roster chair (daily rate=\$590.34)	
<b>Discretionary Funds</b>	\$140 per student for schools identified as Model or Reinforce according to SDP's School Progress Report (SPR) \$165 per student for schools identified as Watch or Intervene according to SDP's School Progress Report  These funds may be used for staff, supplies, textbooks, computers, extra-curricular activities, parent outreach, etc.	
<b>School Redesign Initiative</b>	\$50,000 for each school selected for the School Redesign Initiative; additional allocation to be determined	
<b>Special Programs</b>	<i>Arts programs:</i> Less than 250 students in program: \$30,000 250 to 499 students in program: \$40,000 Over 499 students in program: \$50,000  <i>IB programs:</i> Schools with IB programs receive .6 teacher to serve as the IB coordinator	

<sup>2</sup> Summer Reorganization days (10 days) and Professional Development days (10 days) for Principals/Assistant Principals (10 months) will NOT be included in the Summer Reorganization allotment; the funding will be in a central budget code. Principals/Assistant Principals will be required to submit a 324 with Assistant Superintendent's signature for reimbursement.

Based on projected staffing, each school must calculate its projected Summer Reorganization costs or request that the Office of Management and Budget (OMB) calculate its projected Summer Reorg costs and budget accordingly. Any difference between the budgeted amount and the amount used may NOT 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.

**Enrollment Driven Regular Education Teacher Allocations**

<b>Elementary Schools</b>	<b>Middle Schools Ratio</b>
Kindergarten – Grade 3 Ratio: 30 to 1 Grades 4 – 8 Ratio: 33 to 1  Prep Time: $(.175 \times \text{Number of Teachers}) + (0.066 \times \text{Number of } 7^{\text{th}} \text{ \& } 8^{\text{th}} \text{ grade teachers})$	Ratio: 22.5 to 1  Prep time is included in the ratio, resulting in a class size ratio of 33 to 1
<b>High Schools</b>	<b>CTE High Schools</b>
First 700 Students Ratio: 24 to 1 Students Above 700 Ratio: 26 to 1  Prep time is included in the ratio, resulting in a class size ratio of 33 to 1	First 700 Students Ratio: 19.9 to 1 Students Above 700 Ratio: 22.9 to 1  Prep time is included in the ratio, resulting in a class size ratio of 33 to 1

Note: Final allocations may differ slightly due to rounding

### School Operating Budget Examples

The chart below provides examples of school budgets based on the allocation methodology described above. While schools are allocated funds sufficient to purchase the allotments shown below, principals may repurpose funds, with the exception of the principal and teachers, based on the needs of their school.

	<b>School A</b>	<b>School B</b>	<b>School C</b>	<b>School D</b>	<b>School E</b>	<b>School F</b>	<b>School G</b>
	Small Elementary School SPR : Watch	Large Elementary School SPR : Model	Middle School SPR : Watch	Small High School SPR : Watch	Special Admission High School SPR : Reinforce	Large Comprehensive High School SPR : Intervene	CTE High School SPR : Watch
<b>Enrollment</b>	<b>353</b>	<b>1,179</b>	<b>569</b>	<b>353</b>	<b>1,090</b>	<b>1,425</b>	<b>636</b>
<b>Regular Ed Teachers</b>	<b>17.2</b> (excludes 1 Kind. Teacher funded in grants)	<b>44.0</b> (excludes 5 Kind. Teachers funded in grants)	<b>22.0</b>	<b>14.2</b>	<b>43.8</b>	<b>50.4</b>	<b>27.8</b>
<b>Principal</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>
<b>Assistant Principals</b>	<b>0</b> (enrollment <700)	<b>1</b> (enrollment between 700 & 1,349)	<b>0</b> (enrollment <700)	<b>0</b> enrollment <700)	<b>1</b> (enrollment between 700 & 1,349)	<b>2</b> (enrollment between 1,350 & 1,999)	<b>0</b> (enrollment <700)
<b>Counselors</b>	<b>0.5</b> (ES; enrollment <525)	<b>2</b> (ES; enrollment >949)	<b>1</b> (MS; enrollment between 525 and 949)	<b>1</b> (HS; enrollment <950)	<b>2</b> (HS; enrollment between 950 & 1,599)	<b>2</b> (HS; enrollment between 950 & 1,599)	<b>1</b> (HS; enrollment <950)
<b>Secretaries</b>	<b>1</b> (enrollment <1,150)	<b>2</b> (enrollment between 1,150 & 2,249)	<b>1</b> (enrollment <1,150)	<b>1</b> (enrollment <1,150)	<b>1</b> (enrollment <1,150)	<b>2</b> (enrollment between 1,150 & 2,249)	<b>1</b> (enrollment <1,149)
<b>Noon-Time Aides</b>	<b>3</b> (enrollment between 300 & 499)	<b>7</b> (enrollment between 950 & 1,249)	<b>4</b> (enrollment between 450 & 599)	<b>3</b> (enrollment between 300 & 499)	<b>7</b> (enrollment between 950 & 1,249)	<b>8</b> (enrollment between 1,250 & 1,599)	<b>5</b> (enrollment between 600 & 749)
<b>\$100 Teacher &amp; Counselor Allotment</b>	<b>\$1,770</b> (\$100 x 17.7 teachers & counselors)	<b>\$4,600</b> (\$100 x 46.0 teachers & counselors)	<b>\$2,300</b> (\$100 x 23.0 teachers & counselors)	<b>\$1,520</b> (\$100 x 15.2 teachers & counselors)	<b>\$4,580</b> (\$100 x 45.8 teachers & counselors)	<b>\$5,240</b> (\$100 x 52.4 teachers & counselors)	<b>\$2,880</b> (\$100 x 28.8 teachers & counselors)
<b>Summer Reorganization</b>	<b>Secretary: 10 days</b>	<b>Secretary: 10 days</b>	<b>Secretary: 10 days Roster Chair: 10 days</b>	<b>Secretary: 10 days Roster Chair: 10 days</b>	<b>Secretary: 10 days Roster Chair: 10 days</b>	<b>Secretary: 10 days Roster Chair: 10 days</b>	<b>Secretary: 10 days Roster Chair: 10 days</b>
<b>Discretionary Funds</b>	<b>\$58,245</b> (\$165 x 353 students)	<b>\$165,060</b> (\$140 x 1,179 students)	<b>\$93,885</b> (\$165 x 569 students)	<b>\$58,245</b> (\$165 x 353 students)	<b>\$152,600</b> (\$140 x 1,090 students)	<b>\$235,125</b> (\$165 x 1,425 students)	<b>\$104,940</b> (\$165 x 636 students)
<b>Total Basic Operating</b>	<b>\$2,419,095</b>	<b>\$6,131,560</b>	<b>\$3,087,385</b>	<b>\$2,125,345</b>	<b>\$6,023,100</b>	<b>\$7,131,825</b>	<b>\$3,789,840</b>

Notes: Kindergarten teachers are grant funded and not included in Total Basic Operating Funds. Summer Reorganization are allocated centrally and not included in Total Basic Operating Funds.

## **CENTRALLY ALLOCATED RESOURCES**

This section describes those resources that are distributed to schools by the District's central program offices. These resources must be used for the purposes prescribed by the assigning office. Please note that centrally-determined resource levels for the 2015-2016 school year are preliminary and subject to change. Adjustments may be made in the fall when actual school enrollments are determined.

### ***Athletics***

The Office of Athletics supports all School District of Philadelphia organized interscholastic teams by providing administrative and financial support to 42 high schools and District middle grades 6, 7, and 8. The Office of Athletics has a \$7.5 million budget, which is allocated specifically to provide necessary athletic supplies and equipment, uniforms, transportation and lodging to/from athletic events, and the necessary personnel, contracts, and facilities to host athletic events. The majority of funding, approximately \$5.5 million, is allocated for the extra-curricular salaries and benefits of athletic directors, coaches, and sports chairpersons. Additionally, the Office of Athletics provides ongoing support to schools that express the need for additional equipment and supplies due to the use, wear, and tear of materials. These needs are assessed and approved by the Executive Director, Robert Coleman.

The remainder of funding not directly allocated to schools is spent as follows:

- Approximately \$500,000 for software and technical support in accordance with the Pennsylvania Interscholastic Athletic Association (PIAA) for officials' salaries and to maintain compliance standards
- Approximately \$360,000 for athletic trainers to cover all athletic events to ensure the safety of athletes
- Approximately \$325,000 for transportation to and from athletic events
- Approximately \$150,000 for school police to cover many athletic events to ensure the safety of those attending the events
- Approximately \$62,500 for contracts for facilities for athletics events
- Approximately \$50,000 for use of School District facilities
- Discretionary funding to maintain the infrastructural integrity of SDP's four athletic supersites and various schools' playing fields

### ***Bilingual Counseling Assistants***

Bilingual Counseling Assistants (BCAs) are paraprofessionals whose main function is to serve as a cultural broker and linguistic bridge between English language learners, their limited-English proficient parents/guardians, and school staff. They also help ensure equitable access to services and opportunities for multilingual students and their families and act as a liaison between multilingual students and families, school staff, English Language Learners (ELLs), and community organizations. Bilingual Counseling Assistants are allocated to schools based on the following considerations: Document Language (which represents the language spoken by the student's parents), Home Language (which represents the student's language), number of students enrolled in the English for Speakers of Other Languages (ESOL) program at a school, and data provided by the Philadelphia Refugee Resettlement Providers Collaborative regarding the anticipated group of refugees that will resettle in the Philadelphia.

### ***Career and Technical Education***

The Office of Career and Technical Education (CTE) manages all CTE programs in schools. New programming is planned based upon changing industry and business trends, requests from schools, and an assessment of areas that will enhance opportunities for students. Schools may apply to the CTE office to be considered for placements of new programs. Opportunities for requesting new programs are announced in the late fall each year with applications due by the end of January. Principals may not discontinue CTE programs without approval by the CTE and Academic Offices. Principals who are considering this action must notify the CTE office so a review and evaluation of the requests can be initiated.

The CTE office allocates resources using a formula that multiplies the enrollment in CTE programs by the number of credits that students earn in the program. The per student amount available to be allocated is determined annually



by the amount of the Perkins grant award (a federal grant administered by the Pennsylvania Department of Education) and CTE state subsidy that the District receives. These funds can be used for consumable supplies, textbooks, and other needs to support the delivery of CTE programs. See Appendix D for required, permissible, and ineligible uses of Perkins funds. Two examples are provided below.

School	CTE Enrollment by Grade	Credits Earned	Per Student Amount	Allocations	Total Allocation
School A	10 <sup>th</sup> – 125	2	\$12.75	\$3,187.50	\$10,327.50
	11 <sup>th</sup> – 115	2		\$2,932.50	
	12 <sup>th</sup> – 110	3		\$4,207.50	
School B	10 <sup>th</sup> - 53	1	\$12.75	\$675.75	\$4,245.75
	11 <sup>th</sup> - 75	2		\$1,912.50	
	12 <sup>th</sup> - 65	2		\$1,657.50	

Note: Examples provided are for illustrative purposes only. Actual allocation will be determined based on the amount of the Perkins grant and the state subsidy.

Additionally, the Office of Career and Technical Education allocates a small number of teachers to schools for a two year period to support the creation of new CTE programs.

### **English for Speakers of Other Languages (ESOL)**

ESOL teacher allocations are determined by the number of students identified as English Language Learners (ELLs) and the level of support required at various proficiency levels as determined by the ACCESS language proficiency test. There are six proficiency levels: Level 1 (Entering), Level 2 (Beginning), Level 3 (Developing), Level 4 (Expanding), Level 5 (Bridging), and Level 6 (Reaching). Students who have been designated as an English Language Learner but have not been assigned a proficiency level are coded as Level 7 (Other). Alternate considerations are made for special admission and city-wide admission schools as mandated by a consent decree resulting from past litigation related to services for ESOL students. Six examples of school allocations are provided below.

School	ELL Count by Proficiency Level								Formula					Allocation
	1	2	3	4	5	6	7	Total	Levels 1 + 2	Level 3 × .5	(Levels 4 + 5 + 6 + 7) × 0.25	Total	Total/30	
School A	3	1	5	0	0	0	0	9	4	2.5	0	6.5	0.22	0.00
School B	0	0	0	0	0	0	3	3	0	0	0.75	0.75	0.03	0.00
School C	0	0	0	0	0	0	0	0	0	0	0	0	0	0.00
School D	72	89	111	119	43	13	51	498	161	55.5	56.5	273	9.10	9.00
School E	9	14	19	23	1	1	1	68	23	9.5	6.5	39	1.30	1.50
School F	48	40	53	55	9	1	6	212	88	26.5	17.75	132.25	4.41	4.50

In some cases, deviation from the formula is necessary in order to provide equitable ESOL support across the District. In all schools, the Office of Multilingual Curriculum and Programs is committed to providing professional development opportunities to all educators serving ELLs. Schools that have a partial ESOL teacher allocation may make a school-based purchase to create a whole position at the school. Such purchases should be communicated to the Deputy of Multilingual Services, Allison Still (awstill@philasd.org).

### **Food Services Division**

The Food Services Division provides daily K-12 breakfast and lunch meals in 247 District and charter schools plus twilight dinner meals in high need District locations. All students are served, without charge, regardless of family income. Division meal volume exceeds 28,000,000 meals per year.

The Food Services Division receives no District or City of Philadelphia financial support but relies on various U. S. Department of Agriculture grant programs administered by the Pennsylvania Department of Education for

funding. Individual school budgets incur no cost for student meal operations as all labor, food, and equipment costs are borne by the Food Services Enterprise Fund.

### ***Itinerant Music***

Class Instrumental Music Teachers (CIMTs) are allocated and assigned to schools throughout the district to provide the greatest number of students with equitable and consistent access to relevant, meaningful, and high-quality instrumental music instruction. CIMTs are highly skilled, highly-qualified, certified music educators, categorized by specializations in strings, woodwinds, brass, and percussion. Instrumental music instruction is typically first offered in third or fourth grade and continues through high school, though in some circumstances instruction is available for younger students as determined by the availability of age-appropriate inventory. Allocations and assignments are based on various criteria including equitable distribution, student enrollment, available inventory of instruments, adequate and safe environment for instruction and storage of inventory, and accessibility of students. Consideration is also given to establishing feeding patterns within learning networks to provide opportunities for continuous instruction through graduation. At the high school level, CIMTs are allocated to support school-based instrumental music teachers and are assigned based on their specialty and the needs of the program.

### ***JROTC***

Junior Reserve Officer Training Corps (JROTC) is an educational program that has been adopted by SDP to be offered in selected high schools as an elective program open to all students. It is currently offered in 11 District high schools including SDP's designated military academy high school, the Philadelphia Military Academy. Participation in the programming is voluntary, except at the Philadelphia Military Academy, where all students must participate, and requires parental permission. Students receive elective credit for their participation.

JROTC instructors are added to school allocations at no cost to the school. For the Department of Defense to maintain the programs in a school, schools must maintain an enrollment reflecting a cross-section of no less than 10% of the student population or 100 students if the student population is 1,000 or greater. Funds for uniforms, instructional materials, equipment, and activities are provided by the JROTC Command and/or the Office of Career and Technical Education. In addition to the curriculum, JROTC Instructors are required to provide extracurricular activities.

JROTC instructors report to the principal of the high school to which they are assigned. The Office of Career and Technical Education oversees all programming. SDP's JROTC office is located at Roxborough High School.

### ***Nurses***

School nurses are allocated based on school enrollment, in accordance with the state mandated ratio of 1:1,500, as well as the medical needs of the students who attend each school. Full-time nursing services are provided to schools with enrollment of at least 1,500 students and schools where there are medically fragile students who require medical services that can only be performed by a school nurse. Medical conditions that require procedures that only a nurse can perform include g-tube with medication, catheterization when the student cannot perform self-catheterization, and insulin when the student cannot self-administer.

Part-time nurses are assigned to schools with fewer than 1,500 students. Schools that do not have full-time nursing services but have students with medical needs follow the student's emergency health care plan and use the Emergency First Aid Care Chart for guidance. School nurses and the Office of School Health Services are always available by telephone for consultation. As schools are dynamic and as the needs of the schools change constantly, additional adjustments may be made to assignments.

### ***Pre-Kindergarten Programs (Pre-K)***

Pre-K program resources are deployed based on a combination of the existing need for such services within the surrounding community and the physical space available within a building to house program-related activities for

children ages 3 to 5. The School District of Philadelphia provides Pre-K educational services to approximately 8,800 age- and income-eligible children through its own Head Start and Bright Futures programming, as well as through formal partnership agreements with over 50 high-quality, community-based early learning agencies. Fifty-nine District schools currently host Pre-K programs and receive one certified lead teacher and one qualified teacher assistant for each Pre-K classroom, one noon-time aide per program site, and an additional noon-time aide wherever there are three or more classrooms at a single location. Sites also receive funds for materials and supplies based on need. Five examples from the 2013-14 program year are provided below:

	School A	School B	School C	School D	School E
Pre-K Enrollment	20	38	60	76	100
Classrooms	1	2	3	4	5
Teachers	1	2	3	4	5
Teacher Assistants	1	2	3	4	5
Noon-time aides	1	1	2	2	2
Materials and Supplies	\$497.61	\$684.49	\$875.82	\$1,217.94	\$1,432.94

### ***Police Officers***

School Police Officers are allocated to high schools by the Office of School Safety to allow officers to bid into school assignments by seniority. There are a limited number of these positions. The remaining school police officers are assigned and deployed by the Office of School Safety based on a combination of the following criteria: enrollment, annual number of serious incidents reported at each school, number of school suspensions, size of the school, and status as a "focus" school. Bidding for these allocated positions does not occur until the end of July; therefore, final assignments for all schools will not be determined until mid-August.

### ***Promise Academies***

Promise academies, schools designated by SDP as in-District turnaround, receive additional funding to support student improvement. The District has 12 identified promise academy schools. Each school receives additional funding in the form of:

- 12 month principal
- 1 reading specialist
- 1 math specialist
- 1 counselor
- 1 school improvement support liaison (SISL)
- \$250 per student
- Staffing bonus (included in central budgets, not school budgets)

The resources listed above may not be reallocated for other purposes.

### ***Psychologists***

School psychologists are responsible for the evaluation of students and the administration of consultative services to multidisciplinary student support teams, school administrators, and individual teachers and students. Such consultative services are intended to support efforts to accommodate student needs in the Least Restrictive Educational environment.

School psychologists are allocated based on student need, as reflected by the percentage of students identified as special education, and the number of students demonstrating a need for supportive interventions through the Response to Instruction and Intervention (RTII) process. In addition to the evaluation of the needs of each school, allocations take into consideration district-wide needs, such as Early Intervention transition and assessments of students placed in out-of-district settings. With respect to re-evaluation needs, attention is given to the complexity of the identified student needs and the frequency of re-evaluation needs. For example, a school with multiple Life

Skills Support and Multiple Disability Support classes is likely to have a large population of complex students requiring re-evaluation on an every two year cycle. This school would receive a larger allocation of psychologist services than a school with a small population of special needs students with high incidence disabilities, such as Speech and Language Impairment. As schools are dynamic and as the needs of the schools change constantly, additional adjustments may be made to assignments.

### ***Special Education***

Special education teachers are allocated based on the following factors: number of students enrolled, type of program or support enrolled students receive, age range of students, and level of special education service. A student's "level of service" is the amount of direct service and support provided by a certified special education teacher/related service provider. There are three levels of service and each defines the percentage of time in a school day (in instructional minutes) that a student receives special education services. The levels of service are: Itinerant (20% or less of the day); Supplemental (between 20% and 80% of the day); and Full-time (80% or more of the day).

State regulations specify the maximum number of students on a teacher's caseload for IEP/case management purposes. The regulation factors for IEP caseload/case management include: levels of service, type of program, and student age range. It is possible for an IEP case manager teacher to have students on his/her caseload of different program types and levels of service. The State regulations and the Individual with Disabilities Education Act (IDEA) do not contain requirements relating to class size.

Some students may require highly intensive services in more restrictive environments with smaller class sizes. Classroom assistants may be allocated to these classes based on enrollment to support classroom teachers and the intensive programming needs of these students.

To ensure full compliance with federal laws and regulation, the Grants Compliance Office will be visiting schools to assess whether special education personnel are serving in their intended capacity. Personnel not fulfilling their intended roles will be reallocated.

## **GRANTS**

The section below describes funds distributed to schools through major grants programs that are operated by the District, as well as the rules governing the use of these funds. These resources must be used for the purposes prescribed by the granting agency and cannot be reallocated for other purposes.

### ***Title I(A)***

Title I(A) (TI) funds, as well as other federal grants with “Supplement Not Supplant” provisions, require that schools first have the resources that they need to run a compliant educational program - compliant with state and local regulations, collective bargaining agreements, policies, and procedures - before any federal funds are utilized to *upgrade* or *augment* the instructional programs in schools. Each school's educational program must be evaluated using the guidelines below as the 2015-16 school budget process is initially rolled out and then be re-evaluated when operating dollars are added or subtracted from schools, if that should occur. It is possible that schools will need to revise the initial allocation of their operating and Title I budgets to ensure compliance.

### **Purpose and Allowable Usages of Title I Funds**

The purpose of the Title I 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.

In allocating the Title I grant dollars, schools must ensure that they are creating a *viable* Title I program. Both the U.S. Department of Education and the Division of Federal Programs at the Pennsylvania Department of Education define a viable Title I program as a discernible and defined intervention. That is, a school cannot simply load Title I dollars into books and supplies without defining a specific research-based methodology for improving student achievement through that investment.

*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 increased *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 federal Cost 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 we feel comfortable?
- **Allocable:** Is this purchase in proportion to the value received by the program?

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

### **Restricted Usages of Title I Funds**

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 C for detailed information regarding the use of Title I grant funds.

### Title I Personnel Purchases:

- Schools must meet the staffing requirements and any other required provisions set forth by the School Reform Commission and any pertinent collective bargaining agreements in force at the time of the start of the 2015-16 school year prior to the addition of supplemental Title I staff.
- Teachers are allocated based on the criteria outlined in the School Basic Operating Budgets and the Centrally Allocated Resources sections of this guide.

Principals will be allowed to trade-in teaching positions which may result in increased class size in order to purchase other position types. However, if the principal elects to trade-in Operating teaching positions that increase class size above the class size limits, a Title I teaching position(s) CANNOT be purchased to reduce class size, as that violates the federal rule against supplanting.

- **Counselors:** In order to use Title I funds for a supplemental counselor, a school **MUST** have at least **ONE** complete counselor dedicated to counseling services purchased with Operating funds. Once this requirement has been fulfilled, Title I funds may be used to purchase a supplemental counselor with a justification supporting instruction provided in the Federal Budget Addendum.
- **Assistant Principals (AP):** For school year 2015-16, Assistant Principals will NOT be a TI allowable position. Two reasons for this are: 1) limited funding and resources for the coming school year make it impractical to provide evidence of supplemental activities by the AP; and 2) various activities in the AP job description (e.g., observations, lunchroom duties, reinstatements) are not TI allowable.
- **Additional Prep:** Additional prep may be purchased with the justification in the Federal Budget Addendum on how this “additional prep” is linked to providing additional instruction and/or Professional Development time.
- **Librarian/Library Instructional Materials Assistant (LIMA):** If a school chooses to buy a librarian or LIMA, schools with enrollments of 1,000 or greater must purchase the initial Librarian/LIMA from the operating budget. Schools with less than 1,000 students may use TI funds to purchase either position.
- **Classroom Assistants/Supportive Services Assistants (SSAs):** These positions may be purchased only to support instruction in any of the core classrooms. When combining an SSA and noon time aide position, the SSA can only be purchased from Title I for a 3-hour position.

### Title I Non-Personnel Purchases:

- Schools must have the basic supplies that they need to operate - office and classroom supplies, including paper, etc. - in their Operating budgets in order for dollars to be allocated as “supplemental” in their Title I budgets. Schools must have purchased a reasonable amount of those items to operate their schools from their operating budgets before allocating supplemental funds for those purposes which are considered allowable from Title I to be in compliance with Title I guidance and cost principals set forth in OMB Circular A-87.
- Schools need to purchase core curriculum materials with operating dollars. Each school's core curriculum must be clearly defined and would need to exist in the absence of Title I grant funds. When core curriculum purchases have been made with operating dollars, Title I dollars may be used to provide supplemental materials consistent with the purposes of Title I.

### Allocation Amount and Methodology:

The total amount of Title I funds that the District currently plans to allocate to schools in FY16 is \$77,584,596. The per school allotment of Title I (A) funds is based on four independent methodologies:

1. **Poverty Distribution** – Dollars are allocated based on the number of children living in circumstances of poverty per school as identified by Temporary Assistance to Needy Families (TANF)/Supplemental Nutrition Assistance Program (SNAP) data and supplemented by statistical estimates. For the 2015-16 school year, the SDP has adopted the Community Eligibility Provision (CEP) of the National School Lunch Program in lieu of the “Yancy” supplemental statistical poverty calculation. The CEP provision multiplies the identified poverty student count by

1.6 to determine the total identified student poverty count (not to exceed the total enrollment of the school). The allotment per poverty student is calculated employing a tier function applied as follows:

- To establish the tiers, the total number of children living in circumstances of poverty was distributed in schools across the District as equally as possible across five tiers with schools rank ordered by poverty. If a break was created and there were schools with the same poverty percentage above and below a break, the break had to be shifted so that equal poverty percentages were captured in the same tier.
- The established tiers and their associated per poverty pupil allocations are:

Tier	Poverty Range	Per Poverty Pupil Allocation
1	76.61% - 100%	\$670
2	70.71% - 76.60%	\$570
3	65.61% - 70.70%	\$560
4	57.15% - 65.60%	\$200
5	19.53% - 57.14%	\$150

- To calculate each school’s total Title I(A) allocation, the Per Poverty Pupil Allocation is multiplied by the number of children living in circumstances of poverty as identified by the TANF/SNAP and the supplemental statistical adjustment (CEP).

**2. Priority and Focus School Distribution** – The Commonwealth of Pennsylvania received a waiver from USDE regarding certain NCLB requirements. The waiver, among other things, abolished the school improvement designations for each school building and school district. The waiver established a new accountability measure, the School Performance Profile (SPP), to measure the academic progress of all public schools. Title I schools receive a federal designation of “Priority,” “Focus,” “Reward,” or “Title I – No Designation” based on four annual measurable objectives:

- Student participation on the math and reading Pennsylvania System of School Assessment (PSSA) exams and the algebra I, biology and literature Keystone Exams;
- Student graduation or attendance rate;
- Closing the achievement gap of all students – reducing the number of students who score below proficient on the PSSA, Keystone Exams and the Pennsylvania Alternate System of Assessment (PASA) by 50 percent over a six-year period; and
- Closing the achievement gap of historically underperforming students – reducing the number of students with disabilities, economically disadvantaged, and English language learners who score below proficient on the PSSA, Keystone Exams, and the PASA by 50 percent over a six-year period.

The waiver stipulates that a district must allocate at least 20% of the yearly Title I award off-the-top to provide “meaningful interventions” to Priority and Focus schools before any other Title I funds are allocated. Based on an SDP FY16 award estimate of \$127.31 million, Priority and Focus schools will be targeted to receive \$25.47 million dollars. The District decided to allocate these funds directly to Priority and Focus schools to be used for “meaningful interventions” which have not been defined by PDE except that those interventions must be consistent with existing activities allowable under Title I. The targeted Priority and Focus school dollars are allocated based on student enrollment as of October 2014 (not poverty), and the dollars are in addition to the poverty distribution of dollars described above.

Given that Priority schools are in relative greater need of support than Focus schools, the allocation methodology is as follows:

- Per Student Allocation for Priority Schools of at least \$473 per student
- Per Student Allocation for Focus Schools of at least \$363 per student

- 3. Parental Involvement Distribution** – For 2015-16, the District will continue to allocate Title I Parental Involvement funds strictly per the federal regulations. The District will calculate 1% of the District’s entire Title I allocation for 2015-16, set aside the required equitable share for participation of non-public programs, and then distribute the remaining 95% to schools to use as their minimum for Title I Parental Involvement. The 95% for parental involvement will be distributed to schools proportionally based upon each school’s portion of the formula-driven Title I funds allocated to schools (see Item 1. Poverty Distribution). Schools will not be required to set aside additional Title I funds for parental involvement but may do so to increase the amount spent on this activity.

**Professional Development Activity** – The Commonwealth of Pennsylvania’s Waiver to No Child Left Behind (NCLB) no longer requires a minimum professional development set-aside. However, as all District schools are Title I School-wide Programs, all schools are required to offer their teachers professional development in those areas that will best support increased student achievement. There may or may not be a cost for this professional development, depending on how and when the professional development is offered. Professional development must be addressed in the Comprehensive Planning document, regardless of the funding source. The decision on the amount to budget from Title I Professional Development, if any, will be made at the budget table between the Principal, the Assistant Superintendent, and the Grant Compliance Office.

- 4. Supplemental “Push-in” Funding to Priority and Focus Schools** – To further address specific Priority / Focus school needs, the District will “push-in” additional resources to those schools for specific purposes determined by SDP’s central office to address specific Anchor Goal priorities.

- **Reading Specialists** – To help support Anchor Goal 2 (100% of 8-year-olds will read on grade level), a select number of Priority / Focus schools have been identified to receive funding to purchase an additional Reading Specialist. The criteria for determining this extra resource is based on the percentage of students who scored basic or below basic on the 3<sup>rd</sup> grade PSSA-Reading exam.
- **Keystone Tested Area Support** – To help support Anchor Goal #1 (100% of students will graduate, ready for college and career), a select number of Priority / Focus neighborhood high schools will each receive a school based project manager for the keystone tested areas of Biology, Algebra I, and English II. The criteria for this resource is based on a school’s graduation rate; Priority and Focus schools that have a graduation rate lower than 80% will receive this resource.
- **Special Education Support** – To help support Anchor Goal #1, a select number of Priority / Focus schools will each receive an Instructional Improvement Resource Teacher for Special Education to ensure that the state and federal compliance requirements are met and that parents perceive the school as a place where their concerns are heard. The Instructional Improvement Resource Teacher for Special Education will become a part of the principal’s Instructional Leadership team for the purpose of improving/monitoring/supporting the quality of instruction that students with special needs receive each day. The goal is to provide schools with additional staff to support IEP meetings and teacher development (general and special education teachers serving students with special needs). Each month, the staff member will be prepared by central office staff to support monthly school-based educator effectiveness professional development.

Schools were selected based on the number and percentage of special needs students defined as requiring AS, ES, LS, LSS, or MDS support. Schools serving a special education population in excess of 20% of their total population and more than 100 students receiving special education services will receive the resource. Subsequent to such criteria, a select number of schools in rank order by the number of special education students will receive the allocation.



### ***Title II(A)***

Title II(A) funds, as well as other federal grants with “Supplement Not Supplant” provisions, require that schools first have the resources that they need to run a compliant educational program - compliant with state and local regulations, collective bargaining agreements, policies, and procedures - before any federal funds are utilized to *upgrade* or *augment* the instructional programs in the schools. Each school's educational program will have to be evaluated using the guidelines below as the 2015-16 school budget process is initially rolled out and then be re-evaluated when operating dollars are added or subtracted from schools, if that should occur.

In recent years, Title II(A) has been used to reduce the number of split-grade classrooms in the primary grades (1 through 4). Split-grade classrooms are those classrooms in which students from two different grades are assigned to the same classroom. In FY16, the operating budget has created split-grade classrooms in grades 1 through 3. In these scenarios, Title II(A) funds could be utilized to hire an additional teacher to eliminate the split-grade and reduce class size. Critical to the use of Title II(A) funds for this purpose is the federal principle that operating funds must be applied in an equitable fashion and that federal funds must *Supplement Not Supplant* state and local funds. Therefore, the methodology employed for the use of Title II(A) is that split-grade classrooms will be eliminated in grade “bands” (i.e., eliminate 2<sup>nd</sup>/3<sup>rd</sup> split-grade classrooms, eliminate 1<sup>st</sup>/2<sup>nd</sup> split-grade classrooms). To the extent Title II(A) funds are available, they will be used to eliminate the 2<sup>nd</sup>/3<sup>rd</sup> grade splits and then 1<sup>st</sup>/2<sup>nd</sup> grade splits, starting with the highest poverty schools within each band and serving schools in poverty order.

Based upon initial enrollment projections, anticipated split grades will be allotted teachers as described using Title II(A) funds and logic herein described during the school budget development phase in March. If a school receives a split grade reduction teacher allotment and a principal trades off an Operating teacher at the budget development meeting in March, the Title II(A) supplemental teacher will be withdrawn. If a principal trades-in an Operating teacher position at the budget development meeting in March that creates a split grade classroom, a Title II(A) position will not be provided. The final determination of which schools receive split-grade elimination teachers will take place after class rosters are verified in the fall. In September, the Grant Compliance Office will make school visits to determine the validity of the allocation and utilization of Title II(A) teachers to eliminate split-grade classrooms. If the split-grade classroom was, for example, the consequence of an Operating teacher being traded-in, or if there is a teacher acting as a Dean of Students without a classroom of record, then the Title II(A) teacher(s) will be withdrawn from the school.

### ***School Intervention Funds (Formerly School Improvement Funds)***

Title I School Intervention Funds (1003a) are federal, formula-driven grant funds from the Pennsylvania Department of Education’s (PDE) Division of Federal Programs (DFP). The DFP 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 designated Priority and Focus in 2013-2014 that generate per school Title I School Intervention Fund grant allocations, and then these same schools receive these funds in 2015-2016.

Across the Commonwealth, for each Focus and Priority school, the DFP averaged the PVAAS values for all subjects/grades tested (maximum of 9 areas) and awarded accordingly:

- \$80,000+ for schools that are above zero standard errors
- \$70,000+ for schools that are above the minus two standard errors and not above zero as well as newly coded schools
- \$60,000+ for schools that are below the minus two standard errors

### **Allowable Usages of School Intervention Funds**

Title I School Intervention Funds must be used for those activities that will most directly impact and increase student achievement and close the achievement gap. The schools should follow the Title I, Part A guidelines when considering how to allocate Title I School Intervention Funds (see Appendix C). However, Title I School Intervention Funds *do not* have professional development or parental involvement set asides.

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

- Necessary: Do we really need this to implement our Comprehensive 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 (15-16)? If asked to defend this purchase, would we 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 Intervention Funds generally 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 Intervention Funds. SISLs are *not* allowable with Title I, Part A funds. If a school wishes to purchase a SISL with Title I School Intervention Funds, the school will have to split-fund the position with another eligible funding source.

#### Restricted Usages of School Intervention Funds

Title I School Intervention Funds may not be used to provide basic requirements or mandated services needed to run an instructional program per the “Supplement Not Supplant” principle.

## **STAFFING GUIDELINES**

### ***Teachers***

#### **Identifying Transfers**

Step 1: Principals review their 2015-16 school budgets, determine staffing needs for their school, and identify the appointment areas where they need to reduce staff.

Step 2: The Staffing Team confirms for principals the specific teachers eligible to be transferred and the vacant positions for their schools.

Step 3: The least senior teacher within the affected appointment area will be transferred unless the principal, with review and approval by their Assistant Superintendent, provides a compelling reason not to do so. If a compelling reason is approved, then the next least senior teacher in a certification will be transferred, and so on, unless the principal, in each case, provides a compelling reason not to do so. A compelling reason exists if the transfer out causes a significant, adverse impact to the school or program such as:

- Loss of a teacher who has a significant impact on student achievement and/or is an expert in instructional practices for his/her content area
- Loss of a teacher who manages a grant program that is unique to the school and that can only be managed by that teacher
- Loss of a teacher who has multiple roles within school operations or manages school/student activities that will be lost if the teacher is reassigned
- Loss of a teacher who plays a significant role in professional development, teacher coaching, etc., that will be lost if the teacher is reassigned

Step 4: After reviewing and approving compelling reason requests, Assistant Superintendents provide the list of schools and teachers to be considered for seniority exceptions to the Chief Talent Officer. All non-seniority transfer requests must be accompanied by a compelling reason statement. Compelling reasons will be reviewed and approved by the Chief Talent Officer.

Step 5: The Staffing Team notifies principals of their final lists of transferred teachers at the end of the compelling reasons process.

Step 6: The Staffing Team creates a master list of teachers, by appointment area, eligible for selection. The Staffing Team will provide the list to the PFT, with specific notification of the non-seniority transfers. The Staffing Team will also provide the PFT with the list of vacancies.

Step 7: The Staffing Team notifies transferred teachers of their eligibility for selection. All forced transfers will apply for vacancies through TeacherMatch, the District's applicant tracking system. All teachers, regardless of transfer status, are eligible to apply for open positions, and the Staffing Team will notify them of the process, including that they must apply through TeacherMatch.

If a position eliminated during the budget process is restored on or before July 31, the teacher who was transferred from the school will be given the option to return to the position. If the teacher chooses not to return, the position will be filled by the below processes.

#### **Filling Vacancies**

All schools are considered full site selection, and all teacher positions are filled using the site selection process. The following are eligible for site selection:

- Forced Transfers

- An appointed certified teacher who is being dropped due to enrollment (may be out of seniority order due to the compelling reasons process)
- A teacher on special assignment (hire date after 6/19/2014) whom the principal has elected to not retain for the following school year
- Voluntary Transfers
  - An appointed certified teacher who has at least two years of location seniority
    - A teacher who has been rated unsatisfactory in the current year is ineligible for voluntary transfer
- Restorations to Service
  - A former certified SDP teacher who has applied for and is eligible for restoration to service

The Staffing Team will open internal movement on April 13, 2015. The Staffing Team will post vacancies on a rolling basis, as they are identified, to TeacherMatch.

Teachers participating in internal movement must complete the application in TeacherMatch, beginning on April 13, 2015, which asks for basic information (such as confirming current address, phone number, etc.), reference information, and a resume. The Staffing Team will provide ongoing reminders to teachers who have not yet started and/or completed their applications in TeacherMatch.

Principals of schools gaining positions should review the pool of eligible candidates and use their site selection committee process to interview and select candidates for their vacancies. Principals will use TeacherMatch to review resumes of available candidates and track their selection processes.

Schools are encouraged to start the hiring process as positions become available. Principals may begin submitting site selections to the Staffing Team on April 27, 2015. The Staffing Team will honor site selections on a rolling basis. Once a principal submits a site selection, the teacher accepts the position, and the Staffing Team honors the site selection, the teacher is no longer eligible for site selection at another location. The Staffing Team will notify both the principal and the teacher of the honored site selection no later than 24 hours (or the next business day) after the teacher accepts the position. When a principal site selects a teacher through TeacherMatch, the teacher's application is no longer visible to other principals. If the teacher declines the offer, his/her application is immediately available for other principals to view again.

Because all schools are full site selection, it will not close. However, internal movement for teachers will close on Friday, June 5, 2015. At this point, the Staffing Team will identify all remaining vacancies and all remaining eligible teachers. As necessary, the Staffing Team will conduct job fairs for principals and remaining eligible teachers to fill any remaining vacancies. In the event there are vacancies after the job fairs have concluded, the Staffing Team will assign teachers to vacancies. Any teacher hired through a job fair or after Friday, June 5, 2015 will be on special assignment. As with last year, voluntary transfers, rights to return, and rights to follow will not be considered.

The site selection pool will be populated by all teachers in the District participating in the internal movement process, including teachers transferred out of their school due to a reduction in positions and early childhood teachers. Should positions remain after principals have site selected all current eligible District teachers in an applicable classification, the site selection pool will be populated by:

- Teachers on layoff in certification areas where there are not sufficient active teachers available<sup>3</sup>
- Teachers new to the District in certification areas where there are not sufficient teachers (either active or recalled from layoff) available

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<sup>3</sup> As of 2/13/2015, five District teachers remain in layoff status: one Arabic teacher and four librarians; additionally, 32 District counselors remain in layoff status.

## ***School-Based Support Positions***

The following positions are eligible for site selection

- Secretaries
- School Improvement Liaisons
- School Operations Officers
- Community Relations Liaisons
- SSAs
- Noon-Time Aides
- Special Education Classroom Assistants & One-to-One Assistants

All other school-based support positions (i.e. Bilingual Classroom Assistants, LIMAs) will continue to be transferred and filled as in the past.

### Identifying Transfers

Step 1: Principals review their 2015-16 school budgets, determine staffing needs for their school, and identify the appointment areas where they need to reduce staff.

Step 2: The Staffing Team confirms for principals the specific school-based support staff eligible to be transferred and the vacant positions for their schools.

Step 3: The least senior staff member within the classification will be transferred unless the principal, with review and approval by the Assistant Superintendent, provides a compelling reason not to do so. If a compelling reason is approved, the next least senior staff member within the classification will be transferred, and so on, unless the principal, in each case, provides a compelling reason not to do so. A compelling reason exists if the transfer out causes a significant, adverse impact to the school or program such as:

- Loss of a staff member who has skills unique to the school's needs and that are only possessed by that staff member, including because the staff member has received specialized training
- Loss of a staff member who has demonstrated the ability to perform all needed tasks, who possesses the full set of required skills, and who has demonstrated superior performance
- Loss of a staff member who has a significant impact on the school's climate and culture due to knowledge of the school community and relationships with families/staff
- Loss of a staff member who has documented dependability to perform his/her role above expectations
- Loss of a staff member who has a significant impact on a student's or a group of students' academic growth and/or socio-emotional development

Step 4: After reviewing and approving compelling reason requests, Assistant Superintendents provide the list of schools and school-based support staff to be considered for seniority exceptions to the Chief Talent Officer. All non-seniority transfer requests must be accompanied by a compelling reason statement. Compelling reasons will be reviewed and approved by the Chief Talent Officer.

Step 5: The Staffing Team notifies principals of their final lists of transferred school-based support staff at the end of the compelling reasons process.

Step 6: The Staffing Team creates a master list of school-based support staff, by job classification, eligible for selection. The Staffing Team will provide the list to the PFT and Local 634, with specific notification of the non-seniority transfers.

Step 7: The Staffing Team notifies transferred school-based support staff of their eligibility for selection. All forced transfers will apply for vacancies through TeacherMatch, the District's applicant tracking system. All school-based

support staff, regardless of transfer status, are eligible to apply for open positions, and the Staffing Team will notify them of the process, including that they must apply through TeacherMatch.

#### Filling Vacancies

All schools are considered full site selection, and all of the above listed job classifications are filled using the site selection process. The Staffing Team will open internal movement on May 4, 2015. The Staffing Team will post vacancies on a rolling basis, as they are identified, to TeacherMatch.

School-based support staff participating in internal movement must complete the portfolio in TeacherMatch which asks for basic information (such as confirming current address, phone number, etc.), reference information, and a resume.

Principals of schools gaining positions should review the pool of eligible candidates and directly select candidates based on the needs of their students and the school. Principals will use TeacherMatch to review resumes of available candidates and track their selection processes.

Schools are encouraged to start the selection process as positions become available. Principals may begin submitting site selections to the Staffing Team on May 18, 2015. The Staffing Team will honor site selections on a rolling basis, notifying both principals and school-based support staff of the selection decisions. Once a principal submits a site selection, the employee accepts the position, and the Staffing Team honors the site selection, the employee is no longer eligible for site selection at another location. The Staffing Team will notify both the principal and the employee of the honored site selection no later than 24 hours (or the next business day) after the employee accepts the position. When a principal site selects an employee through TeacherMatch, the employee's application is no longer visible to other principals. If the employee declines the offer, his/her application is immediately available for other principals to view again.

Because all schools are full site selection, it will not close. However, internal movement for school-based support staff will close on Friday, June 12, 2015. At this point, the Staffing Team will identify all remaining vacancies and all remaining eligible staff members. As necessary, the Staffing Team will conduct job fairs for principals and remaining eligible staff members to fill any remaining vacancies. In the event there are vacancies after the job fairs have concluded, the Staffing Team will assign staff members to vacancies. Any staff member hired through a job fair or after Friday, June 12, 2015 will be on special assignment. Voluntary transfers, rights to return, and rights to follow will not be considered during the school year.

The site selection pool will be populated by staff transferred out of their schools due to a reduction in positions and voluntary transfers who have at least two years of location seniority. Should positions remain after principals have site selected all current District teachers, the site selection pool will be populated by:

- Staff on layoff in the specific position areas
- Staff new to the District in specific job classifications where there are not sufficient staff (either active or recalled from layoff) available

## Requirements for Hiring

Per federal and PA state statutes, the following clearances and paperwork are required for hire:

Clearance/Paperwork	Cost/Timeline	New Teacher Hires	New School-Based Support Hires	Current Employees Transferring to New Job Classifications	Current Employees Transferring to New Job Locations
Child Abuse Clearance	\$10/Up to three weeks to receive results	X	X	X	
Criminal History Check	\$10/Immediate results	X	X		
FBI Fingerprint Clearance	\$25.75/Immediate results	X	X		
Sexual Misconduct/Abuse Disclosure Release	No cost/Up to 20 business days to receive results from previous employers	X	X		
Medical Form & TB Test	Varies/Varies	X	X		
Transcripts	Varies/Varies	X	X		
Certification Documentation	No cost/Immediate	X			
W-4	N/A	X	X		
I-9	N/A	X	X		

### Highly Qualified Teacher Guidance

Teachers must be certified for every course they teach. Having a teacher lead a single course outside of his/her certification area affects the District's highly qualified teacher percentage. Also, teaching a single course outside of one's certified area requires an emergency permit and meeting the related conditions.

If you have any questions about highly qualified requirements, contact the Certification Office at 215-400-4670 or [compliance@philasd.org](mailto:compliance@philasd.org).

If you have questions about recruiting for teachers with special or multiple certifications, please contact your Staffing Consultant to discuss your needs.

The Pennsylvania Department of Education also publishes Certification and Staffing Policy Guidelines, which include an explanation of what course each certification area covers:

[http://www.education.state.pa.us/portal/server.pt/community/certification\\_staffing\\_policies\\_%28cspgs%29/8626](http://www.education.state.pa.us/portal/server.pt/community/certification_staffing_policies_%28cspgs%29/8626)

### 504 Accommodations for Staff

The Americans with Disabilities Act requires employers to provide work place accommodations for employees with disabilities so that they can perform their jobs. Requests for accommodations are submitted to Employee Health Services, and if necessary, are reviewed by a doctor. Requests are considered on a case-by-case basis. Allocations for the 2015-16 school year will be made as requests are received and approved.

### Scheduling Guidelines in Response to the Affordable Care Act

Beginning January 2015, the federal health care law, the Patient Protection and Affordable Care Act (PPACA), requires that employers with 50 or more full-time employees offer benefits to their full-time employees or pay a penalty to the federal government. Under the PPACA, a "full-time employee" is defined as someone who works an average of 30 hours a week over the course of a school year.

The District currently offers benefits to full-time employees. There also are a number of employees in a variety of job categories who are not technically full-time but who may occasionally work 30 hours/week or more. While there are rules in place to allow for some degree of fluctuation in hours and still not be considered “full-time”, the rules are complex. The District is finalizing benefit rates for non-full-time employees and determining the effect on the District’s budget. Additional guidance, in addition to benefit rates, will be provided the week of March 16<sup>th</sup>.

Impacted positions include:

- All Per Diem Employees: Substitutes and Retirees
- Noon-time Aides
- Supportive Services Assistant (SSA)
- Food Service Workers scheduled less than 5 hours
- Extra-Curricular positions, including Interns
- Any combination of the above positions



## **APPENDIX A: REALLOCATION OF RESOURCES**

In order to ensure that those who work most closely with students on a daily basis have the flexibility to match their school resources to the needs of their school community, SDP principals have the ability to reallocate most allotted school operating budget resources to fit their students' needs. Enrollment-driven teachers and centrally budgeted resources, such as special education teachers, school nurses, etc., cannot be reallocated. Reallocations must be completed in consultation with the school's local School Advisory Council or commensurate stakeholder advisory group and must be approved at the budget table by the school's assistant superintendent.

Schools may also choose to pool resources together in order to purchase positions or equipment. For example, schools A, B, C, D, and E may each elect to trade in a noon-time aide and a portion of their discretionary monies to jointly purchase a school operations officer. The school operations officer would spend one day per week at each school. Schools choosing to pool resources should notify the supervising assistant superintendent in writing of their intentions. Schools should clearly define how the position or equipment will be shared amongst the schools and should provide the amount of resources each school has agreed to contribute toward the purchase.

It is strongly preferred that such pooling of resources occurs between schools within the same learning network. Cross-network pooling of resources will be considered on a case-by-case basis. In the event that schools in different networks choose to pool resources, the schools should notify each supervising assistant superintendent, the Chief Talent Officer, and the Chief Financial Officer of this intent in writing.

## **APPENDIX B: AVERAGE COSTS**

### **Calculation of FY16 Average Costs:**

Average cost for school positions is calculated using projected employee salary and benefits data grouped by title (e.g., principal, teacher). Average costs are simplified in FY16 with a single teacher cost for all school levels (Elementary, Middle, High). The salary scales have always been the same across school levels with the different costs resulting from different average seniorities. Salary data are generated from a download of actual SDP employees taken from the District's financial system each winter. Owing to the salary freezes in effect for most SDP employees, most of the growth in average costs results from increases in benefits costs.

This same basic format is also used to calculate average costs for all other school based position groups. However, during review to determine the final average cost to be used, consideration is given to the type of position, frequency of position being used, and frequency of position being filled. For example, for positions where there are no currently allocated FTEs, the average cost may be set at the prior fiscal year average salary cost, with the cost adjusted only for projected year's benefit changes.

Benefit costs are calculated in three basic groups:

1. Variable Rates (Percentage of Salaries) Set Externally: The employer share of the Public School Employees Retirement System (PSERS)/ Retirement rate is set annually by PSERS and will increase from 21.40% of salaries in FY15 to 25.84% of salaries in FY16. This increase is accountable for the virtually all of the increase in position costs from FY15 to FY16. The other major variable rates set outside of SDP are the employer shares of the Social Security (FICA) and Medicare rates, which total to 7.65% in both years. These externally determined benefits rates total to 33.49% of salaries for FY16, up from 29.05% in FY15.
  - Total percentage of salaries for variable rates set externally:
    - FY15: 29.05%
    - FY16: 33.49%
2. Variable Rates (Percentage of Salaries) Set by SDP: There are six employee benefits for which SDP is essentially self-insured. SDP spreads the costs of these six benefits across all school and agency budgets in proportion to salaries. The District calculates the anticipated total annual cost of each benefit and then calculates the percentage of salaries that will be required to generate the total funding needed. The six employee benefits in this category are: 1) Worker's Compensation; 2) Termination Pay/Unused Leave; 3) Salary Continuation/Disability Insurance; 4) Sabbatical Pay; 5) Unemployment Compensation; and 6) Severance Pay/Reserve Pay-Out for 10-pay-12 Employees. As a group, these rates will decrease slightly in FY16 from their level in FY15.
  - Total percentage of salaries for variable rates set by the SDP:
    - FY15: 9.54%
    - FY16: 8.79%
3. Per Capita Rates: The SDP self-insures for medical care for nearly all full-time employees; Local 1201/32BJ employees are insured through their union. Self-insurance medical insurance rates are set by an outside actuarial firm and differ based on family type and plan type. The FY16 budget contains lower medical rates than those used in average costs at this time last year due to lower than anticipated FY14 actual self-insurance expenditures. Health and welfare, legal, and life insurance rates are set in collective bargaining agreements. For budget purposes, average per capita rates are developed for each union group.

**Variable Benefits ( % of Salary)**

<b>All Employees</b>	<b>2015</b>	<b>2016</b>
Social Security	7.65%	7.65%
PSERS	21.40%	25.84%
Worker's Compensation	3.427%	3.429%
Termination Pay	3.263%	3.064%
Salary Continuation Insurance	0.862%	0.788%
Sabbatical Leave	0.426%	0.350%
Unemployment Compensation	0.645%	0.226%
<b>12 Month Employee Variable Rate</b>	<b>37.67%</b>	<b>41.34%</b>
Severance Pay	0.915%	0.930%
<b>10 Month Employee Variable Rate</b>	<b>38.59%</b>	<b>42.28%</b>

**Per Capita Benefits**

<b>PFT</b>	<b>2015</b>	<b>2016</b>
Medical	\$13,829.34	\$12,817.34
H&W	\$4,447.71	\$4,430.19
Legal	\$165.00	\$165.00
Life Insurance Premium	\$22.46	\$22.60
<b>Per Capita Benefits -- PFT</b>	<b>\$18,464.51</b>	<b>\$17,435.14</b>

<b>CASA</b>	<b>2015</b>	<b>2016</b>
Medical	\$16,075.41	\$11,521.13
H&W	\$4,856.17	\$4,285.02
Life Insurance Premium	\$44.32	\$67.30
<b>Per Capita Benefits -- CASA</b>	<b>\$20,975.90</b>	<b>\$15,873.46</b>

<b>Non-Represented</b>	<b>2015</b>	<b>2016</b>
Medical	\$12,610.65	\$10,469.48
H&W	\$4,257.90	\$3,605.00
Life Insurance Premium	\$78.74	\$89.60
<b>Per Capita Benefits -- Non-Represented</b>	<b>\$16,947.29</b>	<b>\$14,264.09</b>

<b>School Police -- SPAP</b>	<b>2015</b>	<b>2016</b>
Medical	\$12,357.77	\$10,438.97
H&W	\$4,233.96	\$3,631.92
Life Insurance Premium	\$20.91	\$65.70
Legal	\$145.00	\$145.00
<b>Per Capital Benefits -- School Police</b>	<b>\$16,757.64</b>	<b>\$14,281.59</b>

<b>Local 1201/32BJ</b>	<b>2015</b>	<b>2016</b>
Medical	\$13,452.00	\$14,322.00
H&W	\$3,664.06	\$3,816.73
Life Insurance Premium	\$16.68	\$58.72
Legal	\$135.00	\$135.00
<b>Per Capita Benefits -- Local 1201/32BJ</b>	<b>\$17,267.74</b>	<b>\$18,332.45</b>

<b>Cafeteria - Local 634</b>	<b>2015</b>	<b>2016</b>
Medical	\$10,049.61	\$6,543.45
H&W	\$1,950.00	\$1,950.00
Life Insurance Premium	\$26.42	\$48.83
Legal	\$87.42	\$87.76
<b>Per Capita Benefits -- Cafeteria</b>	<b>\$12,113.45</b>	<b>\$8,630.05</b>

<b>Noontime Aides - Local 634 -- Part-Time</b>	<b>2015</b>	<b>2016</b>
H&W	\$112.00	\$112.00
Legal	\$56.94	\$53.21
<b>Per Capita Benefits -- Noontime Aides</b>	<b>\$168.94</b>	<b>\$165.21</b>

<b>Supportive Services Assistants -- Part-Time</b>	<b>2015</b>	<b>2016</b>
H&W	\$4,447.71	\$4,430.19
Legal	\$165.00	\$165.00
<b>Per Capita Benefits -- SSAs</b>	<b>\$4,612.71</b>	<b>\$4,595.19</b>

Sample Calculation for the FY16 Average Cost for Teachers – Operating Budget:

<b>Classification Group Name</b>	<b>Title Name</b>	<b>FTE</b>	<b>Salary Amount</b>	<b>Benefit Amount</b>	<b>Salary and Benefits Total</b>
Teacher	Department Chair, Phys Ed	1.00	\$85,719	\$53,031	\$138,750
Teacher	School Counselor, 10 Months	210.70	\$15,961,757	\$10,310,547	\$26,272,304
Teacher	Teacher, Demonstration	78.80	\$6,305,159	\$3,992,151	\$10,297,310
Teacher	Teacher, Demonstrat, Spec Ed	22.91	\$1,776,855	\$1,137,291	\$2,914,146
Teacher	Teacher, Full time	5,459.89	\$386,263,435	\$255,641,996	\$641,905,430
Teacher	Teacher, Spec Education	1,337.97	\$91,803,962	\$61,450,143	\$153,254,105
	<b>FY16 Projected</b>	<b>7,111.27</b>	<b>\$502,196,887</b>	<b>\$332,585,158</b>	<b>\$834,782,045</b>
	<b>Average Cost (Rounded)</b>		<b>\$70,600</b>	<b>\$46,800</b>	<b>\$117,400</b>

Change in the Average Cost for Teachers from FY15 to FY16:

Virtually all of the increases in average costs were driven by the increase in the employer contribution share for retirement from 21.40% to 25.89% of salaries in FY15 and FY16, respectively. These rates are set statewide by the PSERS Board and have increased steeply from 5.64% in FY11 in order to overcome underfunding of pensions. Traditionally, medical cost increases have also been significant cost drivers but good results in FY14 have led to a moderation in these costs in FY16. Salaries can change as a result of an increase in the average tenure of teachers even when there are no step increases or across-the-board percentage increases. In general, salary increases played a very small role in increasing FY16 average costs.

<b>FY15-16 AVERAGE SALARIES AND BENEFITS</b>			
<b>Position</b>	<b>2015-2016 Average Salary</b>	<b>Fringe Benefits</b>	<b>Total Salary &amp; Benefits</b>
Assistant Principal	\$107,700	\$60,600	\$168,300
Assistant Principal - 12 Months	\$123,300	\$68,500	\$191,800
Bilingual Counseling Assistant	\$37,500	\$33,000	\$70,500
Classroom Assistant	\$23,500	\$27,200	\$50,700
Climate Support Specialist	\$28,300	\$29,400	\$57,700
Community Relations Liaison	\$41,500	\$35,500	\$77,000
Conflict Resolution Specialist	\$35,500	\$32,200	\$67,700
Counselor	\$70,600	\$46,800	\$117,400
Executive Secretary	\$62,200	\$43,700	\$105,900
Health Room Technician	\$8,800	\$8,300	\$17,100
Instructor, JROTC	\$71,300	\$44,500	\$115,800
Librarian	\$70,600	\$46,800	\$117,400
Library Instructional Materials Asst	\$37,500	\$31,100	\$68,600
Non Teaching Assistant	\$41,100	\$32,200	\$73,300
Noon Time Aide (One Hour Daily)	\$2,300	\$1,000	\$3,300
Noon Time Aide 3 Hrs	\$6,900	\$3,000	\$9,900
Noon Time Aide 3.5 Hrs	\$8,050	\$3,500	\$11,550
Noon Time Aide 4Hrs	\$9,200	\$4,000	\$13,200
Noon Time Aide 4.5 Hrs	\$10,350	\$4,500	\$14,850
Noon Time Aide 5 Hrs	\$11,500	\$5,000	\$16,500
Nurse	\$78,000	\$53,400	\$131,400
Principal, 10 Months	\$115,200	\$63,700	\$178,900
Principal, 12 Months	\$144,900	\$77,100	\$222,000
School Aide	\$26,000	\$29,300	\$55,300
School Climate Coordinator	\$49,400	\$38,300	\$87,700
School Climate Manager	\$71,800	\$46,200	\$118,000
School Improvement Support Liaison	\$41,100	\$33,000	\$74,100
School Operations Officer	\$50,700	\$38,500	\$89,200
School Police Officer, 10 Month	\$38,000	\$30,100	\$68,100
Science Lab Assistant	\$43,800	\$33,100	\$76,900
Secretary (10 Mos)	\$38,900	\$33,600	\$72,500
Secretary (12 Mos)	\$49,400	\$38,300	\$87,700
Secretary III (10 Mos)	\$43,800	\$35,600	\$79,400
Secretary III (12 Mos)	\$45,400	\$35,100	\$80,500
Supportive Services Assistant 3 Hours	\$8,800	\$8,300	\$17,100
Supportive Services Assistant 4 Hours	\$11,800	\$9,500	\$21,300
Teacher	\$70,600	\$46,800	\$117,400
Technical Maintenance Specialist	\$49,400	\$38,300	\$87,700

## **APPENDIX C: TITLE I ALLOWABLE ACTIVITIES**

A school must allocate its Title I funds to meet its goals and priorities as set forth in its Comprehensive Planning Document. A school must detail all expenditures in its Federal Budget Addendum (FBA) and expenditures must be consistent with the federal cost principles established in the OMB Cost Circulars and the District's policies and procedures for federal grants management and compliance. The following are lists of allowable purchases for basic instruction, parent involvement, and professional development.

### **Basic Instruction (Activity 1101)**

- An additional teacher to reduce class size. In high schools, additional teachers must be in the core content areas.
- Instructional paraprofessionals to work under the supervision of a highly qualified teacher to provide small group instruction and other academic supports
- An additional prep teacher to create common planning time in elementary schools
- For schools that have a material increase in the number of serious incidents reported or that are categorized as "Persistently Dangerous", climate support initiatives are allowable to include Conflict Resolution Specialist positions and similar supports as part of an explicit climate improvement component of the school wide plan. See "Climate Support Detail" below.
- A classroom set of computers for student use
- Instructional equipment such as Smartboards
- Salaries for teachers and materials to implement an instructional, supplemental after school, Saturday, and summer program
- Instructional interventions
- Supplemental instructional materials (not core)
- Workbooks that supplement the textbook
- Instructional support costs for needy students, specifically PSAT / SAT /ACT prep costs and exams

### **Parent Involvement (PI) - Minimum Set Aside (Activity 3393)**

Note: For 2015-16, the District will be allocating Title I Parental Involvement funds strictly per the federal regulations. The District will calculate 1% of the District's entire Title I allocation for 2015-2016, set aside the required equitable share for participation of nonpublic programs, and then distribute the remaining 95% to schools to use as their minimum for Title I Parental Involvement. The 95% for parental involvement will be distributed to schools proportionally based upon each school's portion of the formula-driven Title I funds allocated to schools. Schools will not be required to set aside a portion of their formula-driven Title I funds for parental involvement but may do so to increase the amount spent on this activity.

- Small amounts of food for parents for a Title I appropriate parent involvement activity such as a workshop or Title I meeting (with RSVPs, agendas, and sign-ins). No more than \$3 - \$5 per parent for breakfast/lunch and no more than \$10 for dinner. Per District policy, schools cannot use Imprest Funds for this purpose.
- Materials for a make and take workshop
- Part time salaries for teachers to run workshops
- Books for parents that support instruction
- Activities and manipulatives for parents to use at home with their children
- Travel for parents to attend Title I allowable conferences
- Printing Title I allowable parent newsletters
- Mailing costs for Title I parent communications (through District's mail—do not purchase stamps)
- Contracts for speakers to provide Title I allowable workshops for parents
- Workshops on core content, understanding standards and assessment, Title I, technology, participating in writing the school plan, Parental Involvement Policy, Compact, or understanding the budget

### **Professional Development – No Minimum Set-Aside Required (Activity 2272)**

Note: The Commonwealth of PA's Waiver to NCLB requirements no longer requires a minimum professional development set-aside. However, as all District schools are Title I Schoolwide Programs, all schools are required to offer their teachers professional development in those areas that will best support increased student achievement.

There may or may not be a cost for this professional development, depending on how and when the professional development is offered. Professional Development must be addressed in the Comprehensive Planning document, regardless of the funding source. The decision on the amount to budget from Title I Professional Development, if any, will be made at the budget table between the Principal, the Assistant Superintendent, and the Grant Compliance Office. Examples of allowable Title I Professional Development are as follows:

- Institutional memberships to professional organizations such as ASCD, NCTM, NCTE and the like
- Literature for teachers and staff on improving student achievement and teaching
- Salaries for before/after school or Saturday professional development
  - Note: Not all meetings are Title I professional development. 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 (individuals are paid the leadership rate to account for this).
- An auxiliary teacher (substitute) to relieve teachers who will attend professional development
- Contracts for vendors to provide Title I allowable professional development
- Travel to Title I allowable conferences (reasonable, necessary, and allocable) with an instructional focus (SEH 194 and turnaround plan required)

### **Climate Support Detail**

The following is additional detail regarding the compliant use of climate supports in schools.

- Climate supports are allowable from Title I in those schools that are either designated Persistently Dangerous, or in the current or prior year have a material increase in the number of reported serious incidents.
- Climate supports would need to be explicitly for climate purposes, such as a Conflict Resolution Specialist or related position trained for that purpose, and not general positions such as Noon-Time Aides or Classroom Assistants.
- Climate supports could also include external contractual support for evidenced based programs, including Positive Behavior Intervention and Support (PBIS), second step, and restorative practices, where the vendor is specifically engaged at the school level for climate support. The PBIS effort must be whole school reform (not grade(s) specific), and the principal must be able to show direct impact on instruction/achievement.
- The climate supports must be explicitly detailed in the schools Comprehensive Plan, supported by data in the Plan's needs assessment, and itemized in the school's federal Budget Addendum.
- Climate supports cannot be the preponderance of the Title I activity in the school

### **Arts Education Detail**

The activity must help facilitate Title I's overall purpose of improving the achievement of students who are failing, or most at risk of failing, to meet the academic content and achievement standards. The activity should be above the PDE and SDP requirement and must be based on a needs assessment. The following is additional detail regarding the compliant use of Title I to support the arts education in schools. The activity must help facilitate Title I's overall purpose of improving the achievement of students who are failing, or most at risk of failing, to meet the academic content and achievement standards.

- An additional (supplemental) arts education teacher salary is allowable if the teacher is over and beyond the requirement and the supplemental teacher supports an additional prep for teacher collaboration and planning activities. For example, a supplemental arts education teacher could provide time in school schedule for teachers to have an additional prep period for grade-level or content collaboration and planning activities).
- Art education supports must be explicitly detailed in the Comprehensive Plan, supported by data in the Plan's needs assessment, and itemized in the school's Federal Budget Addendum.
- Art education support could include external contractual support such as Young PlayWrights or Young Audiences.

## **APPENDIX D: USE OF PERKINS FUNDS**

Below are the required, permissible, and ineligible uses of funds for Perkins. The Office of Career and Technical education reserves the right to deny any request that is not in alignment with the overall CTE initiatives of the School District of Philadelphia.

### **135(b) - Required Uses of Funds**

- Strengthen the academic and career and technical skills of students participating in CTE programs through the integration of academics with CTE programs.
- Link CTE at the secondary level and the postsecondary level by offering the relevant elements of not less than one Program of Study described in the Definitions section.
- Federal funding will be contingent on both secondary and postsecondary eligible recipients partnering and operating under a “statewide articulation agreement” as part of each eligible recipient’s Program(s) of Study.
- Provide students with strong experience in and understanding of all aspects of an industry, which may include work-based learning experiences.
- Develop, improve, or expand the use of technology in CTE, which may include training to use technology, providing students with the skills needed to enter technology fields, and encouraging schools to collaborate with technology industries to offer internships and mentoring programs.
- Provide in-service and pre-service professional development programs to teachers, faculty, administrators, and career guidance and academic counselors who are involved in integrated CTE programs on topics, including effective integration of academics and CTE, effective teaching skills based on research, effective practices to improve parental and community involvement, and effective use of scientifically-based research and data to improve instruction. Professional development should also ensure that teachers and personnel stay current with all aspects of an industry, involve internship programs that provide relevant business experience, and train teachers in the effective use and application of technology.
- Develop and implement evaluations of the CTE programs carried out with Perkins funds, including an assessment of how the needs of special populations are being met.
- Initiate, improve, expand, and modernize quality CTE programs, including relevant technology.
- Provide services and activities that are of sufficient size, scope, and quality to be effective.
- Provide activities to prepare special populations, including single parents and displaced homemakers who are enrolled in CTE programs, for high-skill, high-wage, or high-demand occupations that will lead to self-sufficiency.

### **135(c) - Permissive Uses of Funds**

- Involve parents, business, and labor organizations in the design, implementation, and evaluation of CTE programs.
- Provide career guidance and academic counseling, which may include information described in Section 118, for students participating in CTE programs that improve graduation rates, provide information on postsecondary and career options, and provide assistance for postsecondary students and adults.
- Develop local education and business partnerships, including work-related experiences for students, adjunct faculty arrangements for qualified industry professionals, and industry experience for teachers and faculty.
- Provide programs for special populations.
- Assist career and technical student organizations.
- Provide mentoring and support services.
- Leasing, purchasing, upgrading, or adapting equipment, including instructional aids and publications (including support for library resources) and technical skill achievement.
- Preparing teacher programs that address the integration of academic and CTE and that assist individuals who are interested in becoming CTE teachers and faculty, including individuals with experience in business and industry.
- Developing and expanding postsecondary program offerings at times and in formats that are accessible for all students, including through the use of distance education.



- Developing initiatives that facilitate the transition of sub baccalaureate career and technical education students into baccalaureate degree programs, including articulation agreements, and dual enrollment programs, academic and financial aid counseling, and other initiatives to overcome barriers and encourage enrollment and completion.
- Providing activities to support entrepreneurship education and training.
- Improving or developing new CTE courses, including the development of Programs of Study, for consideration by the state and courses that prepare individuals academically and technically for high-skill, high-wage or high-demand occupations and dual or concurrent enrollment opportunities.
- Developing and supporting small, personalized career-themed learning communities.
- Providing support for approved family and consumer sciences programs.
- Providing CTE programs for adults and school dropouts to complete secondary education or upgrade technical skills.
- Providing assistance to individuals who have participated in services and activities under this Act in continuing their education or training or finding an appropriate job.
- Supporting training and activities (such as mentoring and outreach) in nontraditional fields.
- Providing support for training programs in automotive technologies.
- Pooling a portion of such funds with a portion of funds available to other recipients for innovative initiatives.
- Supporting other CTE activities consistent with the purpose of the Act.
- Submitting Guideline Waivers for out-of-state travel must be approved in advance and are consistent with LEA performance improvement objectives as outlined in the Local Plan.

#### **Ineligible Uses of Perkins Funds**

- Remediation of students in CTE programs.
- Furniture, except specially designed workstations, for supporting instructional equipment or processes.
- Construct, renovate, or remodel facilities.
- Equipment or supplies not used directly to teach skills to students.
- Administrative or supervisory salaries.
- Salaries or wages paid to secretarial support staff.
- Salaries or wages paid to students.
- Administrative duties, such as preparing and managing the Perkins Plan.
- Conference travel unrelated to career and technical education program improvement.
- Out-of-state travel not directly related to program improvement activities outlined in the local plan.
- Routine consumable 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.
- Costs of promotional items and memorabilia.
- Costs of advertising and public relations designed to solely promote the LEA.
- Funding for adult programs may only be used for adult programs.
- Provide meals during a conference or workshop.

## **APPENDIX E: CONTACT INFORMATION**

Below are the names, titles, and email addresses of contact people in various central office functions that can answer questions you may have regarding school budget allocations.

### **Athletics**

*Starr Davenport*  
Director, Financial Management  
sdavenport@philasd.org

### *Christine Irwin*

Executive Director, Grants Compliance  
chirwin@philasd.org  
Contact regarding: Grants compliance questions for all school levels

### **JROTC**

*LTC Myron Young*  
Instructor  
mmyoung@philasd.org

### **Bilingual Counseling Assistants**

*Lutzgarde Soderman*  
Director, Multilingual Family Support  
lsoderman@philasd.org

### **Career and Technical Education (CTE)**

*David Kipphut*  
Deputy  
dkipphut@philasd.org

### **Multilingual Services**

*Allison Still*  
Deputy  
awstill@philasd.org

### **Budget and Grants**

*Kathryn Beverly*  
Senior Financial Analyst  
kajones@philasd.org  
Contact regarding: General school operating budget questions

*Michelle Armstrong*  
Director, CTE  
mharmstrong@philasd.org

*Kenneth Ramos*  
Special Projects Assistant  
kramos@philasd.org

### *Latanya Vicks*

Financial Analyst  
lvicks@philasd.org  
Contact regarding: Operating budget questions for elementary and middle schools

*Nicholas Gasis*  
Assistant Director  
ngasis@philasd.org

### **Prevention & Intervention**

*Naomi Housman*  
Deputy  
nghousman@philasd.org

### *Rafiat Adebawale*

Financial Analyst  
radebowale@philasd.org  
Contact regarding: Operating budget questions for high schools

### **Early Childhood Education**

*Leonard Rossio*  
Assistant Director, Partnership Development  
lrossio@philasd.org

### **School Climate & Safety**

*Jody Greenblatt*  
Director  
jgreenblatt@philasd.org

### *Patricia Eckert*

Budget Technical Analyst  
peckert@philasd.org  
Contact regarding: Operating EBARS and prep time paycheck

### **Family and Community Engagement**

*Evelyn Sample-Oates*  
Deputy  
esampleoates@philasd.org

### **School Safety & Security (Police)**

*Brendan Lee*  
Executive Director of School Safety  
brlee@philasd.org

### *Gale Goodman*

Budget Operations Assistant  
ggoodman@philasd.org  
Contact regarding: Resolutions and Encumbrances

### **Health Services**

*Tracey Williams*  
Director  
Twilliams2@philasd.org

### *Bill Higgins*

Principal Financial Analyst  
whiggins@philasd.org  
Contact regarding: Grant budgets for all school levels

### **Itinerant Music**

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