

**ORANGE COUNTY  
BOARD OF EDUCATION  
AGENDA ITEM ABSTRACT**

**Meeting Date:** April 28, 2014

**AGENDA ITEM No.** 14-04-(2)-12

**ACTION ITEM: (Y/N)** N

**SUBJECT:** Staffing Allotment Formulas

**INFO. CONTACT** Dr. Marcie Holland

**PHONE:** 919-732-8126

**ATTACHMENT:** 1. State Planning Allotment Formulas FY 2013-14  
2. State projected enrollment 2014-15  
3. State planning allotments 2014-15

---

**PURPOSE:** The purpose of this item is to provide the Board of Education an opportunity to hear about and discuss the staffing allotment formulas.

**BACKGROUND:** At the February 10, 2014, Board of Education meeting, the Superintendent was asked to establish an allotment committee to review and work towards creating allotment formulas for the school district. In an effort to work towards that goal, the basic information regarding allotment formulas and current procedures is being provided for your information.

Further, in an effort to better educate principals and other district administrators regarding allotment formulas and to demonstrate the ongoing efforts of the Board of Education, through funding from the Board of County Commissioners that is above and beyond that of state and federal funding, we conducted an "allotment games" exercise at the Leadership Team meeting on Wednesday, March 11, 2014. In the exercise, each administrator was assigned a school in the district and, based on student membership numbers in Month 4 of the Principals' Monthly Report, worked through how many teaching positions should be allotted based on State formulas.

Currently, the process by which schools receive allotted positions includes collecting information from each principal regarding individual school needs. Also, each principal meets with Central Office staff to review the number of core positions, special education positions, career & technical education positions, teacher assistants, student services personnel, etc., which are recommended for the upcoming school year.

Generally, Title I funding and at-risk funding for schools are not discussed during these meetings unless there are unique circumstances about which the principals are seeking guidance from staff.

**FINANCIAL IMPACT:** Approximately 85% of the school system's budget is spent in personnel, including salaries and benefits. Actual figures vary each year depending on staffing and benefit costs.

**RECOMMENDATION:** The Superintendent recommends the Board of Education receive this as information.

## State Planning Allotment Formulas FY 2013-14

Administration	
Category	Basis of Allotment (Funding Factors are rounded.)
<b>Central Office Administration</b>	Increase by LEA from FY 12-13 Initial Allotment is .29%.

Instructional Personnel and Support Services		
Category	Basis of Allotment (Funding Factors are rounded.)	Allotted Salary
<b>Classroom Teachers</b>		
<i>Grades Kindergarten</i>	1 per 18 in ADM. (LEA Class Size Avg. is 21)	
<i>Grades 1 - 3</i>	1 per 17 in ADM. (LEA Class Size Avg. is 21)	
<i>Grades 4 - 6</i>	1 per 22 in ADM.	
<i>Grades 7 - 8</i>	1 per 21 in ADM.	
<i>Grade 9</i>	1 per 24.5 in ADM.	
<i>Grades 10 - 12</i>	1 per 26.64 in ADM.	LEA Average
<i>Math/Science/Computer Teachers</i>	1 per county or based on sub agreements.	
<b>Teacher Assistants</b>	\$1,182.69 per K-3 ADM.	N/A
<b>Instructional Support</b>	1 per 210.53 in ADM.	LEA Average
<b>School Building Administration</b>		
Principals	1 per school with at least 100 ADM or at least 7 state paid teachers or instructional support personnel.	LEA Average
Assistant Principals	1 month per 98.53 in ADM.	LEA Average
<b>Career Technical Ed. - MOE</b> (LIMITED FLEXIBILITY- Salary Increase)	Base of 50 Months of Employment per LEA with remainder distributed based on ADM in grades 8-12.	LEA Average
<b>Classroom Materials/Instructional Supplies/Equipment</b>	\$58.83 per ADM plus \$2.69 per ADM in grades 8 and 9 for PSAT Testing	
<b>Textbooks</b>	\$65.50 per ADM in grades K-12.	

Employee Benefits	
Category	Basis of Allotment
<b>Hospitalization</b>	\$5,192 per position per year.
<b>Retirement</b>	14.23% of total salaries.
<b>Social Security</b>	7.65% of total salaries.

Statewide Average Salaries for FY 2012-13 (Benefits are not included)	
Category	Basis of Allotment
<b>Teachers</b>	\$41,083
<b>Principals (MOE)</b>	\$5,321
<b>Assistant Principals (MOE)</b>	\$4,885
<b>Career Technical Ed. (MOE)</b>	\$4,354
<b>Instructional Support</b>	\$46,997
<p>Note: Dollars for 2013-14 position/month allotments are based on LEA's average salary including benefits, rather than the statewide average salary. They are still position/month allotments and you must stay within the positions/months allotted, not the dollars. This calculation is necessary to determine your LEA's allotment per ADM for charter schools.</p>	

## State Planning Allotment Formulas FY 2013-14

Support	
Category	Basis of Allotment (Funding Factors are rounded.)
<b>Noninstructional Support Personnel</b>	\$233.73 per ADM. \$6,000 per Textbook Commission member for Clerical Assistants.

Categorical Programs	
Category	Basis of Allotment (Funding Factors are rounded.)
<b>Academically or Intellectually Gifted Students</b>	\$1,232.90 per child for 4% of ADM.
<b>At-Risk Student Services</b>	<i>Each LEA receives the dollar equivalent of one resource officer (\$37,838) per high school. Of the remaining funds, 50% is distributed based on ADM (\$87.65 per ADM) and 50% is distributed based on number of poor children, per the federal Title 1 Low Income poverty data (\$336.95 per poor child). Each LEA receives a minimum of the dollar equivalent of two teachers and two instructional support personnel (\$235,472).</i>
<b>Children with Disabilities</b> <i>School Aged</i>  <i>Preschool</i>  <i>Group Homes</i> <i>Developmental Day Care (3-21)</i> <i>Community Residential Centers</i>	<i>\$3,743.48 per funded child count. Child count is comprised of the lesser of the December 1 handicapped child count or 12.5% of the allotted ADM. Base of \$55,264 per LEA; remainder distributed based on December 1 child count of ages 3, 4, and PreK- 5, (\$2,979.01) per child. Approved applications. To be allotted in Revision To be allotted in Revision</i>
<b>Disadvantaged Student Supplemental Funding</b>	<i>See the Allotment Policy Manual for formula for allocating supplemental funding to address the capacity needs of LEAs in meeting the needs of disadvantaged students.</i>
<b>Driver Training</b>	<i>\$199.65 per 9th grade ADM. Includes private, charter, and federal schools.</i>
<b>Limited English Proficiency</b>	<i>Base of a teacher asst. (\$31,101); remainder based 50% on number of funded LEP students (\$397.32) and 50% on an LEA's concentration of LEP students (\$4,166.03).</i>
<b>Low Wealth Supplemental Funding</b>	<i>See the Allotment Policy Manual for formula allocating supplemental funds to eligible LEAs that are located in counties that do not have the ability to generate revenue to support public schools at the state average level.</i>
<b>Small County Supplemental Funding</b>	<i>See the Allotment Policy Manual for formula that allocates supplemental funding to County LEAs with less than 3,239 ADM. Also county LEAs with ADM between 3,239 and 4,080 whose adjusted property tax base per student is below the state average adjusted property tax base per student.</i>
<b>Transportation</b>	Based on an efficiency rated formula and local operating plans.
<b>Career Technical Education - Program Support</b>	\$10,000 per LEA with remainder distributed based on ADM in grades 8-12 (\$33.79).

Restrictions for FY 2013-14 through an ABC transfer.	
Category	Restrictions
<b>Textbooks</b> <b>CTE Months and Support</b>  <b>Classroom Teachers</b> <b>Teacher Assistants</b>  <b>School Technology</b> <b>Position/MOE Allotments</b>	<i>Transfers limited to Current Year Allocation. Transfers to Categories outside of CTE are limited by Salary increase or prior year increase in allocation. Transfers only to Teacher Assistants (PRC 027) Transfers only to PRC 008 - Dollars for K-12 Teachers. Transfers are limited to the amount of current appropriation. No transfers in or out. No Transfers into position or MOE categories.</i>



**Public Schools of North Carolina**  
**North Carolina Department of Public Instruction**

**State Planning Allotment - Fiscal Year 2014-15**  
**ADM**

Enter LEA#

**680**

	<u>ACTUAL</u>	<u>PROJECTED</u>	<u>BETTER OF(2)</u>
KINDERGARTE	560	569	569
GRADE 1	582	583	583
GRADE 2	603	607	607
GRADE 3	586	622	622
GRADE 4	515	603	603
GRADE 5	584	502	502
GRADE 6	610	588	588
GRADE 7	557	623	623
GRADE 8	586	575	575
GRADE 9	672	651	651
GRADE 10	647	638	638
GRADE 11	586	638	638
GRADE 12	508	499	499
<b>TOTAL</b>	<b>7,596</b>	<b>7,698</b>	<b>7,698</b>



**Public Schools of North Carolina**  
**North Carolina Department of Public Instruction**

**State Planning Allotment - Fiscal Year 2014-15**

Enter LEA#

**680 Orange County**

**Allotted ADM 7,698**

PRC #	PRC Name	Planning Allotment			Estimated Allotment Per ADM		
		Position	MOE	Amount	Position	MOE	Amount
001	Classroom Teachers	343.50		\$ 20,244,516.00	0.04		\$ 2,629.84
002	Central Office Administration			\$ 706,988.00			\$ 91.84
003	Non-Instructional Support			\$ 1,816,213.00			\$ 235.93
005	School Building Administration		234.00	\$ 1,560,598.00		0.03	\$ 202.73
007	Instructional Support	35.00		\$ 2,283,260.00	-		\$ 296.60
013	Career and Technical Edu - Month of Employment		382.00	\$ 2,311,864.00		0.05	\$ 300.32
014	Career and Technical Edu - Program Support			\$ 111,574.00			\$ 14.49
019	Small County Supplemental			\$ -			\$ -
022	Mentor Pay			\$ -			\$ -
024	Disadvantaged Student Supplemental Funding			\$ 221,763.00			\$ 28.81
027	Teacher Assistants			\$ 2,313,748.00			\$ 300.56
028	Staff Development			\$ -			\$ -
031	Low Wealth Supplemental			\$ -			\$ -
032	Children with Special Needs			\$ 3,904,165.00			\$ -
034	Academically Gifted			\$ 381,839.00			\$ 49.60
054	Limited English			\$ 345,942.00			\$ 44.94
056	Transportation			\$ 3,100,992.00			\$ 402.83
061	Classroom Material			\$ 221,779.00			\$ 28.81
069	At Risk Student Services			\$ 1,286,848.00			\$ 167.17
<b>Total of State Public School Fund</b>		<b>378.50</b>	<b>616.00</b>	<b>\$ 40,812,089.00</b>			
000	Textbooks			\$ 109,773.00			\$ 14.26
012	Driver Training			\$ 135,304.00			
015	School Technology			\$ -			\$ -
<b>Total of Other Programs</b>				<b>\$ 245,077.00</b>			
<b>Grand Total State Funds Allotted</b>		<b>378.50</b>	<b>616.00</b>	<b>\$ 41,057,166.00</b>			



**State Planning Allotment - Fiscal Year 2014-15**

Enter LEA#

**680 Orange County**

**Allotted ADM 7,698**

**Calculation of Dollars Per ADM For Charter School Information**

PRC #	PRC Name	Amount
	<b>Grand Total State Funds Allotted</b>	\$ 41,057,166.00
032	Less: Children with Special Needs	\$ (3,904,165.00)
054	Less: Limited English	\$ (345,942.00)
012	Less: Driver Training	\$ (135,304.00)
056	Less: Transportation	\$ (3,100,992.00)
099	Plus: Prior Year Transportation	\$ 3,094,710.00
	<b>Revised State Funds Allotted</b>	<b>\$ 36,665,473.00 (a)</b>

ADM	7,698 (b)
State Funds Allotted Per ADM	\$ 4,762.99 (c) = (a)/(b)
Unallotted \$/ADM	\$ 153.45 (d)
<b>State Funds Per ADM (Excluding Children with Special Needs)</b>	<b>\$ 4,916.44 (c) + (d)</b>

<b>Children with Special Needs -- School Age</b>	\$ 3,600,119
Headcount	1,138
<b>\$/Headcount</b>	<b>\$ 3,163.55</b>

<b>Children with Special Needs -- Preschool</b>	\$ 304,046
Headcount	83
<b>\$/Headcount</b>	<b>\$ 3,663.20</b>