

SAM #1: INSTRUCTIONAL PROGRAMS PRELIMINARY ALLOCATION

PURPOSE:

- Basic Classroom Staff: Teachers, Paraprofessionals, Per Diems, etc.
- Instructional Support Services - After-School Literacy, etc.
- School Leadership & Support Personnel -- Principals, Assistant Principals, School Secretaries, etc.
- Other than Personal Services -- Instructional Supplies, Materials and Equipment, etc.

The Instructional Programs Allocation Category funding supports the basic classroom instructional program and instructional support for all pupils -- kindergarten through twelve, general education and special education.

Additional resources are provided by *other* school allocations for supplementary pupil services such as academic remediation, English language learner program excess cost, English as a second language, special education mandates, related services, and health supervision/support.

School Year 2005-2006 Budget Allocation:

Overview

This year's allocation method will extend the current year's (SY 04-05) budget for instructional programs at all schools for another year, except for changes associated with:

- changes in student register,
- changes in average teacher salary,
- Removal of "one time" programmatic items to be allocated under separate method.

In addition, funds for special education **self-contained** and **collaborative team teaching** classes will no longer be included in the Instructional Programs Allocation Category for grades K-8 (and 9th grade *only in schools that terminate at grade of 9*). A new, separate Allocation Category is being established to fund these classes. Instructional Programs allocations will continue to fund special education self-contained and collaborative team teaching classes in new schools (School Years 2004-2005 and 2005-2006 cohorts), High Schools and all Middle/High Collaborative Schools. (See Note #1)

Schools participating in the **Surplus Rollover Program** will receive 50% of their surplus funds in their Instructional Programs Allocation Category. Although these funds will be co-mingled with all the funds in the Instructional Programs Allocation Category, the amount allocated to schools under the Surplus Rollover Program will show up on the Galaxy Allocation History screen as a separate, itemized amount. The remaining 50% of the rolled-over funds will be released to participating schools following a review of their SY04 – 05 year-end financial condition. For further details, please go to

http://www.nycenet.edu/offices/d_chanc_oper/budget/dbor/whats_new/fy05surplus.pdf

Calculation of Instructional Programs Allocation Amounts

The method used to calculate the Instructional Program allocation for all schools, except new schools opening up in September SY 2006, which are funded based upon the Basic Instructional Allocation formula (see Note #2) is as follows:

A FY05 adjusted base allocation is calculated by taking a snapshot of the Instructional Programs allocation as of 3/30/2005 and applying three adjustments:

- Reversal of one-time allocations or budget adjustments: For example, surplus rollover reductions were restored to the allocation. Curriculum unpacking and coach cash allocations were removed (to be re-allocated in subsequent, separate School Allocations);
- Adjustment to a new average salary for the base number of teachers:
 - Using October, 2004 actual registers, the base number of teachers is calculated, including teachers funded from the SY04-05 mid-year adjustment to support smaller self-contained and collaborative team teaching classes and changes in special education registers through December, 2004.
 - For this pool of teachers, the change in average salary is calculated using the average in the current year's budget and an updated average from the end of March payroll. The difference is added to or subtracted from the Instructional Programs allocation.
 - Please note that the change in funding due to the change in teachers average salaries does not affect schools' purchasing power for these allocations.
- Special education self contained and collaborative team teaching funds in grades K – 8 only (and 9th grade only in schools that terminate at grade of 9) are removed – *to be re-allocated in new, separate Allocation Category.*

- The amount removed is calculated using the original FY05 funding formula of 12:1 and 10:1 for self-contained and collaborative team teaching, respectively. The pupil register count used in the formula is based on the actual December 31, 2004 registers. Supplemental mid-year allocations for “empty seats” in classes below formula size are also removed. Because the average salary adjustment was applied to these teachers in the previous step, the removal of funds for these teachers is at the FY '06 salary rate.
- The remaining Instructional Programs funds are then adjusted for register changes using the following process:
 - The difference between the SY05-06 projected registers and October 31, 2004 audited registers is calculated and the original SY04-05 Instructional Programs formula (see Note #3) is applied to this difference.
 - The amount that results from applying the original formula to the change in register is added to or subtracted from the Instructional Programs funds, as adjusted above.

This process yields the SY2005-2006 Instructional Programs allocations. The method applied essentially extends this current year's budgets at schools, ensuring that schools can continue to operate the same quality programs that were in place in SY04-05.

Mid Year Adjustment

Instructional Programs allocations are based upon register projections using currently available information. Actual pupil registers may vary upward or downward from these projections. Schools which are able to demonstrate actual increased pupil registers will be provided with ASA for Register Growth for the basic teacher and pupil per capita components of the Basic Instructional Services formula (see Note 3). Schools which experience lower actual pupil registers must set aside sufficient funds, using the basic teacher and pupil per capita components of the Basic Instructional Services formula, in the Register Loss Set Aside. When the audited October 31, 2005 register is complete, schools' Instructional Programs budgets will be adjusted upward or downward to reflect actual compared to projected registers.

When lower than expected actual register necessitate the **excessing of teachers or other pedagogical staff**, schools which identify *appropriately* excessed pedagogical --in compliance with contractual seniority provisions-- **before September 30** will be **held harmless** for the cost of these teachers for as long as they continue to be carried on that school's Galaxy Table of Organization. Pedagogical staff excessed after the 15th day of school will continue to be funded from a school's budget until they can be placed in a budgeted position elsewhere in the Department of Education.

Note #1: Inconsistencies in ATS grade code data for collaborative schools and the variability of classroom service models for individual high school IEP students prevent these schools from receiving allocations through the new "TL Self-Contained & CTT." Instead High Schools and collaborative schools receive funding for self-contained and collaborative team taught classes as part of their Instructional Programs allocation. These allocations are calculated based upon the change in registers from October, 2004 and School Year 2005-2006 projections and applying the following budget guidelines:

- High Schools are funded for self-contained classes on a pupil: teacher ratio of 15:1 and for collaborative team teaching classes on a pupil: teacher ratio of 10:1.
- Collaborative Schools (e.g., 6-12,) are funded for self-contained classes on a pupil: teacher ratio of 12:1 and for collaborative team teaching classes on a pupil: teacher ratio of 10:1.
- Classroom Ratio Paraprofessionals will continue to be supported from these schools' Special Needs/Academic Intervention Services allocation.

Note #2: For new schools the Basic Instructional Services allocation formula continues to reflect the fact that, in their development, new schools do not require the same level of resources as fully formed existing schools. **For more information on the Basic Instructional Services allocation formula, please see SAM #1 for School Year 2004-2005.**

Note #3: The **Instructional Services** formula has three components: **School Overhead** - allocation dependent upon instructional level (EL, MS, HS) and school register, funds minimum school administrative overhead; **Base Teacher Allocation** - provides funds at the school's average teacher salary for the base number of teachers. The base number of teachers is the projected register divided by the class size and multiplied by the number of teachers needed per class (classroom teacher and coverage teacher); **Pupil Per Capita** – Elementary = \$86 per capita; Middle = \$200 per capita; and High School = \$450 per capita. Only the Base Teacher and Per Capita components are applied in adjusting the Instructional Programs allocation for School Year 2005-2006. School Overhead allocations do not change unless the school adds or subtracts grades.

SUPPORTING TABLES