



School Board Briefing/Proposed Action Report

Informational (no action required by Board) **Action Report** (Board will be required to take action)

DATE: January 25, 2016
FROM: Dr. Larry Nyland, Superintendent
LEAD STAFF: Dan Golosman/Principal/252-2900; dpgolosman@seattleschools.org
Michael Tolley, Associate Superintendent of Teaching and Learning
206-252-0017, mftolley@seattleschools.org

I. TITLE

McDonald International School 2016-17 Annual Fund for Language Immersion Instructional Assistants (IAs) **For Introduction:** March 2, 2016
For Action: March 16, 2016

II. WHY BOARD ACTION IS NECESSARY

Per Board Policy No. 6114, Gifts, Grants, Donations & Fundraising proceeds, acceptance of donation funds greater than \$250,000 requires approval by the Board. This motion would authorize acceptance of funds from McDonald Parent Teacher Student Association (PTSA) up to \$502,000. If funding is not received by June 1, 2015 the positions to be filled by the grant will not be filled. Non-grant funds are not available for payment of any of the direct costs of salary and benefits for these positions.

The school’s 2015-16 PTSA Immersion Support Campaign goal is \$502,000 to fund ten (10) Language Immersion Instructional Assistants (IAs) and five Language Immersion interns.

III. FISCAL IMPACT/REVENUE SOURCE

There is no direct fiscal impact to the General Fund for this action.

The revenue source for this motion is the McDonald International PTSA Immersion Support Fund donation for Language Immersion IAs. If these funds are not received by June 1, 2016, the IAs will not be budgeted and the positions will not be filled.

Expenditure: One-time Annual Other Source N/A

IV. POLICY IMPLICATION

Per Board Policy No. 6114, Gifts, Grants, Donations and Fundraising Proceeds, acceptance of grant funds of greater than \$250,000 requires approval by the Board.

V. RECOMMENDED MOTION

I move that the School Board approve the acceptance and use of PTA Annual Fund monies up to \$502,000 to pay for Language Immersion Instructional Assistants (IAs) and Language Immersion Interns at McDonald International School for the 2016-17 school year.

VI. BOARD COMMITTEE RECOMMENDATION

This motion was discussed at the Audit & Finance Committee meeting on February 11, 2016. The Committee reviewed the item and moved it forward for consideration by the full Board.

VII. BACKGROUND INFORMATION

The McDonald International PTA fundraising goal for the “Immersion Support Fund” (the Language Immersion Instructional Assistants) this year is \$502,000. This amount is required to pay for a total of 10 IAs and up to 5 Language Immersion Interns. This fundraiser is a direct ask campaign run by the McDonald International PTA and focuses on percentage of participation in the campaign. Last year McDonald had around 90% participation.

Since starting as an international school, the PTA Immersion Support Campaign has helped staff our Language Immersion Instructional Assistants. For 2012-13, the PTA contributed \$132,500 to help pay for the five Language Immersion Instructional Assistants needed for our program. In 2012-13, due to the fact that McDonald International was a new school and didn't yet have a large parent base for support, the PTA was only able to pay for 2.5 FTE, and the district provided additional funds to help pay for 2.5 FTE (approximately \$115,000) of Language Immersion Instructional Assistants. In the 2013-14 school year, over \$400,000 was raised to pay for 8.5 IAs and 4 interns.

From the beginning of the new school, the McDonald PTA had planned to raise funds each year to provide one immersion language IA in every language immersion classroom until the end of the first year of 5th grade language immersion classes. Since we now have language immersion classes through 4th grade, this means that 2015-16 is the last year the PTA plans to raise funds for this level of IA support. The long-term plan is to lower the total amount raised. The McDonald International PTA and the school have been collaborating to develop a staffing and fundraising plan that is more sustainable for parents. This will mean that beginning in 2016-17, the goal will no longer be to have one immersion language IA in every classroom. Instead, our draft plan would provide full time IAs in Kindergarten and 1st grade, but this level of IA support would taper off in the upper grades while we simultaneously make use of more interns. This would result in significantly lower overall fundraising goals for future years (somewhere between \$300,000 and \$400,000).

Due to the difficulty in hiring native/heritage-speaker Language Immersion Instructional Assistants, in the past the Budget and Staffing Departments and the Grants Office have collaborated with International Schools by utilizing the Letter of Intent of financial support by the McDonald PTA. The Letter of Intent allowed us to not displace Language Immersion Instructional Assistants from year to year hence building predictability for these staff in their positions.

Budget and expenditure controls are in place to assure that these positions are fully funded by the grant funds, and no non-grant monies will be used to pay the salary and benefits for these positions.

If the fundraising goal is not met, McDonald will not retain/rehire the existing 8.5 Immersion Language Instructional Assistants. McDonald will only retain the number of IAs that the PTA

fundraising campaign can afford to keep for next year, and the IAs whose positions are not funded will be displaced. If enough funds are raised to retain the 8.5 existing IAs, but not hire a 9th or 10th IA for next year, McDonald will not hire the additional IAs. Regardless, there will be no cost to the district.

VIII. STATEMENT OF ISSUE

This motion is coming before the Board because the policy requirement of acceptance of any funds over \$250,000 going to the Board for Approval. Our PTA Immersion Support Campaign goal of \$502,000 exceeds the Letter of Intent limit of \$250,000. Anything over \$250,000 must go to the Board for approval.

IX. ALTERNATIVES

Consider the PTA Immersion Support Campaign as two separate funds. This alternative is not recommended because although the PTA Immersion Support Campaign staffs both Japanese and Spanish Language Immersion Instructional Assistants and could be viewed as two separate funds, our school community utilizes our Language Immersion IAs as a team of staff that supports all immersion classrooms.

X. RESEARCH AND DATA SOURCES / BENCHMARKS

Data: Since our start as an international school, McDonald has used the PTA Immersion Support Campaign to help staff our Language Immersion Instructional Assistants. For 2012-13, the PTA contributed \$132,500 to help pay for the five Language Immersion Instructional Assistants needed for our program. Due to the fact that McDonald International was a new school and didn't yet have a large parent base for support, the PTA was only able to pay for 2.5 FTE, and the district provided additional funds to help pay for 2.5 FTE (approximately \$115,000) of Language Immersion Instructional Assistants.

XI. TIMELINE FOR IMPLEMENTATION / COMMUNITY ENGAGEMENT

If approved by the Board on March 16, 2016, McDonald staff will then meet with the Budget and Staffing office to staff the Language Immersion IA's for the 2016-17 school year.

Tentative Timeline:

- February 11, 2016 Introduce this motion to the Audit and Finance Committee
- March 2, 2016 Bring to the Board for Introduction (if moved forward by the committee)
- March 16, 2016 Final Board Action on the request is taken
- (Date TBA) Upon Board approval of this motion, meet with Budget & Staffing office to staff our Language Immersion IA's for the 2016-17 school year
- (Date TBA) Announce to our staff, Annual Fund Committee, and community that we have staffed our Language Immersion IA's for the 2016-17 school year pending funds raised by Annual Fund

XII. ATTACHMENTS

- Request for Advance Commitment to Expend Grant Funds (with Mitigation Plan embedded on page 3)
- School funding for Elementary International Schools



2016-2017

Request for Advance Commitment to Expend Grant Funds Office of Grants & Fiscal Compliance

The attached form is to be used by a principal or a program manager to request permission to expend grant dollars prior to the receipt of a formal commitment from a funding agency.

General Practice

In unusual cases, a principal or a program manager may request authorization from the Office of Grants & Fiscal Compliance (G&FC) to spend funds under an “anticipated grant program” or “donation” prior to the receipt of a formal commitment from the funding agency.

Such authority will be granted by G&FC if a *written guarantee* is provided, assuring that the *principal or program manager will cover the risk* of a delayed start date or failure of the funding agency to make an award as anticipated. As possible, the principal or program manager should identify the “alternative fund source” that will be used to cover the expenditure if the grant funding is not forthcoming. Understanding that this is not always a possibility, please contact the G&FC with questions on how to address this.

PLEASE NOTE: A signed “Request for Advance Commitment to Expend” form must be received by G&FC before approval can be given. Only the principal/program manager can make/sign this request. Included on this form is the school’s plan of how the expense could be covered if funding should not materialize or the agreement is rescinded by the funder after a position has been staffed or an expense has been incurred. Forms without this information may be significantly delayed in processing.

Procedures

1. Complete all sections of the following form and send it to Kevin Corrigan in the Office of Grants & Fiscal Compliance.
2. Upon review with program or school’s budget analyst, a decision will be made regarding the request.
3. Requests should be made a minimum of ten (10) days in advance of the need.
4. If approved, a fund code will be set up and sent to grants accounting for processing.
5. Any request that is above \$250,000 in an initial request will require approval by the Seattle Public Schools’ Board of Directors.
6. Annual requests that are supplemented during the course of the year to the point the total awarded exceeds \$250,000 must get approval by the Board when the \$250,000 is exceeded. Note: this process can take up to six weeks and is dependent on timing/meeting schedules.

Note: The authorization is normally approved for a maximum period of ten (10) months. The Office of Grants Accounting will monitor and follow-up until all payments on the grant award have been received. All funding must be received before June 30 in the fiscal year they are applied.

Email completed/signed form in PDF format to Michael Stone in the G&FC Office mastone@seattleschools.org. To submit a hard copy, print out the form, sign and date the form and deliver it to M/S 33-182. Signed forms can also be faxed to 252-0016.



2016-2017
Request for Advance Commitment to Expend Grant Funds
Office of Grants & Fiscal Compliance

To: Michael Stone – Interim Director, Grants, Fiscal Compliance and Strategic Partnerships

From: Dan Golosman, McDonald International School
Principal/School

Date: January 18, 2016

I request that authorization be given by the Office of Grants & Fiscal Compliance to expend funds under the following proposed grant commitment:

▪ Title of Program: Language Immersion Instructional Assistants (7 Immersion Instructional Assistant FTE and 6 Interns)
(If funding FTEs or specific programs, provide details. You may attach a separate sheet)

▪ Fund Source: Our PTA Makes the commitment to fund our Language Immersion Instructional Assistants on a yearly basis.
(PTA/PTSA/Other – If “other”, please specify – Note: This is organization making the commitment to the school or program)

▪ Fund Source Contact: McDonald International Immersion Support Campaign Chair and PTA President (Maija Brissey, Shelley Herzog)
(Name of the person/contact info for the organization promising the funds – Name, Telephone, E-mail address)

Shelley Herzog, president@mcdonaldPTA.org

Maija Brissey, chair of IS Fund Campaign, donate@mcdonaldPTA.org

▪ Amount/Level of Projected Funding: \$414,000

▪ Projected Funding Period (Start/Stop Dates): September 1, 2016 to August 31, 2017

▪ Method of Payment: Invoice payment, McDonald PTA
Indicate if single, monthly, quarterly, billable/invoice payment or other. If a single payment, please enter date of check and amount)

The reason for this request is that (briefly justify why an advance commitment is necessary):

Based on research of best practices in language immersion, in the SPS International Schools model at JSIS and McDonald International, we have Immersion Language Instructional Assistants or Language Immersion Interns in each immersion classroom. It is understood that without the funding from the PTA, the Instructional Assistants who are presently employed will be displaced during the Spring of 2016, therefore, no other building or district funds will be used to cover costs if the PTA doesn't meet its fundraising goal. Parents from our PTA lead the Immersion Support Campaign. The Immersion Support Campaign has a short time frame to help in the staffing of our IA's earlier in the year during budget and staffing season so they are not displaced.

If funding is not forthcoming as projected, is received later than anticipated or if the amount received is less than proposed, my school proposes to cover the costs using the following budget or method:

- Fund: N/A (See note above)
N/A (See note above)
- Fund Center: _____
- Commitment Item: N/A (See note above)

By signing below, the principal accepts responsibility for the repayment of the advance on anticipated grant or donation of funds *(see notes above - There will be no cost to the district or school if the funds are not raised by the PTA) DPG*

Concurrence:  Date: 1/25/16
(Only the signature of the Principal will be accepted)

Email completed/signed form in PDF format to Michael Stone in the G&FC Office, mastone@seattleschools.org. To submit a hard copy, print out the form, sign and date the form and send via District mail to M/S 33-182. Signed forms can also be faxed to 252-0016.

Office of Grants & Fiscal Compliance Action:

_____ Approved* (Per Board Approval on March 16, 2016)

_____ Not Approved

_____ Returned for additional information:

Signature:

FY2015-16 Funding by School as Adopted

2015-2016 Budget

By School	Org	Type	B/E Enroll	FRL%	Seg. Level	Reg. Ed	Spec Ed	E.L.L.	Equity (FRL)	Total WSS Formula	Supplm.	Total Allocation Model	Dollars/ Pupil		Other Support		Total Fund 1000 Allocation	GENERAL FUND GRANTS					Total Allocation w/ All Grants	Budget w/out "Other" Grants	
													all	less: SE & ELL	SelfHelp & SubReimb	FeeSuptK		Title I	LAP	City Levy Grant	Other Grants	Total Grants			
Beacon Hill International	BH	Elem.	480	57.7%	5	2,546,322	204,172	298,334	72,230	3,121,058	231,738	3,352,796	\$6,985	\$5,938	-	-	3,352,796	90,849	60,252	194,676	-	345,777	3,698,573	3,698,573	\$ 7,705
Concord International School	CN	Elem.	410	82.0%	3	2,222,654	441,540	278,437	87,605	3,030,236	185,390	3,215,626	\$7,843	\$6,087	-	-	3,215,626	201,909	92,695	238,500	-	533,104	3,748,730	3,748,730	\$ 9,143
Dearborn Park Elementary	DP	Elem.	382	76.0%	2	2,037,604	347,646	198,828	76,241	2,660,319	139,043	2,799,362	\$7,328	\$5,898	14,971	-	2,814,333	189,463	94,050	238,500	11,209	533,222	3,347,555	3,336,346	\$ 8,734
John Stanford International	LT	Elem.	456	7.7%	5	2,229,667	119,534	39,724	8,937	2,397,862	92,695	2,490,557	\$5,462	\$5,112	-	141,960	2,632,517	-	18,539	-	420,000	438,539	3,071,056	2,509,096	\$ 5,502
McDonald International	MD	Elem.	461	5.0%	4	2,189,303	166,015	-	5,907	2,361,225	92,695	2,453,920	\$5,323	\$4,963	-	141,960	2,595,880	-	18,539	-	399,500	418,039	3,013,919	2,472,459	\$ 5,363