

ELEMENTARY EQUITY POLICY

June 2004

Core PTO Operations

There are traditional functions of PTO's that are crucial to the life of individual schools and the school system: communication, community building, fundraising, and volunteerism. PTO's are encouraged to continue providing these services to their individual schools without restriction or limitation on spending.

School Operations

School Operations is the educational and/or academic interactions between teachers and students during the school day. PTO's are encouraged to continue to support their individual schools in enriching the educational experience of students. All PTO monies spent in this area are capped. Refer to the Addendum following for further discussion on the per pupil rate. The formula used to calculate Allowed Equity Spending is as follows:

$$\# \text{ of projected students} \times [\text{the annual per pupil Equity Rate}] \times .55 = \text{Allowed Equity Spending}$$

Under this policy, PTO contributions toward school operations can be directed toward the areas the principal and school community determine best meet the needs of the school. PTO's are urged to work closely with the administration at their schools to make sure support is consonant with the Core Values and educational goals of the schools. Principals will exercise their discretion, through discussion with their peers, to accept or reject specific contributions to the school.

It is expected that schools will use good judgment and discretion in setting their fundraising goals and spending priorities. This policy is designed to give PTO's the room to support their schools consistent with their values and capability.

Core Curriculum

It is the responsibility of the School Department to provide all necessary core curriculum materials. The responsibility of defining core curriculum materials will belong to the Assistant Superintendent for Elementary Education, the Assistant Superintendent for Curriculum and Instruction, and the Elementary principals. The Superintendent and Assistant Superintendents will be responsible for informing all principals of such decisions. PTO's are not allowed to fund Core Curriculum, except as specifically excluded below.

Specific decisions concerning what constitutes core curriculum, such as science kits and math manipulatives will be made by the Assistant Superintendent for Elementary Education, the Assistant Superintendent for Curriculum and Instruction, and the elementary principals after consultation with the appropriate coordinator. They will generate a list of these items yearly.

In addition, PTO money may not be spent for core curriculum and staffing as defined by the following:

Textbooks, trade books used as texts and teaching and learning software. Trade books will be considered to be texts if a classroom purchases more than ten (10) copies of a specific book. Purchases of computer software used for teaching and learning (that are not part of a predetermined software bundle included in newly purchased computers) are treated as 'textbooks' under this policy and subject to the equity cap.

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Staffing – PTO money may not be spent to hire staff. This includes staffing for existing positions (e.g., teacher, aide, custodian, secretary) and for new or temporary positions (e.g., world language teachers, computer technicians).

School-based staff development – PTO money may not be spent to train all or a large part of the staff in instructional techniques or curriculum materials. In excluding staff development from PTO spending, the school department is making a commitment to the elementary schools for staff development.

EXCLUSIONS

PTO dollars can be used for all curriculum materials other than textbooks, trade books used as texts and teaching and learning software (other than system and pre-determined bundles as defined above) (up to 10 copies) as long as this is included in the 55% cap. PTO dollars may not be used for staff development except as specified in the policy Exclusion Note.

PTO money may be spent to bring in people “in residence” (e.g., artists, poets, authors, scientists) who spend their time working directly with the students. This spending will be included in the 55% cap for spending in School Operations.

PTO money may be spent (through the principals discretion) to sponsor single or small group teacher attendance at conferences and workshops (e.g., EDCO workshops, the Metco Director’s Association Conference). This spending will be included in the 55% cap for spending on School Operations.

TECHNOLOGY

A partnership between the School Department and the PTO’s to support the further acquisition and implementation of technology in the schools must continue. PTO’s may help their schools acquire up to the School Department’s goal for technology in accordance with the school’s technology plan (see further discussion below in this section). Technology includes computers and peripherals including but not limited to printers, external CD Roms, airports, modems, fax machines, scanners, digital cameras, alpha smarts or other word processors, LCD projectors but also other costs necessary to allow the technology to be placed in use. Other costs encompass other related or similar equipment to that already specified. It also includes the cost of wiring or other infrastructure costs, such as, but not limited to dedicated telephone lines, internet connections, computer drops. In addition, furniture such as carts, tables or related furniture, etc. that are necessary for the school to use the purchased equipment are included. Further, it encompasses the predetermined software bundle loaded with the purchased computers. Supplemental teaching and learning software purchased by PTO’s is subject to the equity cap.

Schools may only acquire technology including computers within the context of the school system’s technology plan and the individual school’s technology plan. A school’s technology plan is developed by the principal and its technology committee with assistance as needed from the school system’s Information Technology Department. A school’s technology plan must fit within the parameters of the School Department’s overall plan. All technology and acquisitions must be approved by the school system’s Information Technology Department. Technology plans should recommend a phasing in of computers to guard against simultaneous obsolescence.

While technology should be acquired in accordance with an individual school’s own technology plan, the standards for computers, peripherals and software purchased or donated are set by the School Department which will be responsible for the necessary equipment maintenance and staff training.

ELEMENTARY EQUITY POLICY, continued

The funding for infrastructure (wiring, dedicated telephone lines, internet connections, computer drops, etc.) is also the responsibility of the school system. In its long-range plan for technology, the school system must determine the infrastructure requirements that will support a full complement of computers at all schools (e.g., one computer: five students).

The Equity Committee and PTO's acknowledge the necessary and ongoing work of Newton School's Technology Department, which includes preparing and monitoring an overall Technology Plan and those of the individual schools, and the equitable distribution of resources. There must also be acknowledgement that school-level principals, teachers and parents will all identify specific technology needs at a particular school. Considering both of these factors, the PTO's role is to support acquisitions of technology for the school's approved technology plan. All purchases for technology will be made through approved School System channels, and the relative benefit to outright purchase, loan or leasing as the payment mechanism will be assessed by appropriate System personnel involved in purchasing functions.

Regardless of whether PTO's demonstrate an inability to purchase computers, or choose not to purchase computers, the School Department is responsible for allocating its technology resources to equalize ratios and any inequities among the schools.

All technology (computers, printers, software, digital cameras, etc.), once acquired, becomes the property of the Newton Public Schools.

MONITORING OF TECHNOLOGY

The School Department is responsible for tracking computer and related equipment acquisitions at each of the schools. It is incumbent upon the School Department to use its technology resources to equalize ratios and mitigate current and future inequities among the schools in technology. In order to adequately monitor equity of technology across the schools, it is critical that ongoing inventories for each school be kept by the Technology Department for this purpose and presented to the Equity Committee by the Technology Department for review ***on an annual basis***. Technology inventories should encompass all significant technology equipment (including different types of computers as well as other technology, such as digital cameras, projectors, which are becoming increasingly important to the educational process).

COPIERS

The School Department will continue to provide copiers for the schools on an established cycle. A PTO may purchase copiers for its exclusive use, but these copiers may only be placed in the school with the approval of the principal.

LIBRARIES

All PTO donations of books to the library are considered as part of school operations and are therefore subject to the 55% equity cap.

All costs associated with retrospective conversion of school libraries are categorized as non-equity, and therefore not subject to the 55% cap, as to funding by PTO's.

PLAYGROUNDS

Playgrounds and playground related expenses will continue to be considered non-equity line items in PTO budgets. Availability of seed money from the City for new playgrounds (historically provided on a rotating basis) will be determined by the Mayor.

GRANTS

ELEMENTARY EQUITY POLICY, continued

Every school has equal access to grants. Computers and related technology items acquired through grants will be counted toward a school's allowable technology total. Other resources received through grants will not be limited at this time, but could be monitored for future assessment.

FINANCIAL REPORTING

The Equity Committee recommends that all PTO's make their financial records available to the Equity Committee and the Assistant Superintendent of Schools on an annual basis. The PTO Council Equity Liaison will continue to receive, compile and analyze yearly budgets to review compliance with this policy and will report his or her findings to the Assistant Superintendent of Schools. The committee also recommends that all PTO's report their finances in the standardized Equity Reporting Format (Appendix B), using the Standard Definitions for PTO Budget Line Items (Appendix C), which have been used since 1999-2001 and annually clarified by the Committee as appropriate.

GIFTS TO THE SCHOOLS

The School Committee's policy regarding gifts to the schools is still in effect and principals are responsible for informing their schools of this policy.

Gifts intended for the schools (not given by the PTO) must be made to the system as a whole and accepted by the School Committee. The giver can request that his or her gift be made to a certain school and the system determines if it is fair for the designated school to accept the gift. Acknowledgement of the monetary value of the gift is given for tax purposes.

MONITORING OF POLICY

Principals and PTO's together must monitor and regulate their own spending in accordance with this policy. Because principals must assume the responsibility of being the gatekeepers at their individual schools, equity issues should periodically be discussed at the principals' administrative group meetings. We recommend that at least annually principals discuss specific categories of PTO expenditures and their compliance with this policy.

The School Department will annually track the spending of the schools and their PTO's to ensure compliance with the policy.

ELEMENTARY EQUITY POLICY, continued

CONTINUATION OF THE EQUITY COMMITTEE

This policy document reflects the work of the recent Equity Committees, as convened through June 2004. To the extent that the School Committee, the School Department Administrators or the PTO Council has specific concerns, issues or potential changes to Equity Policy or practices, the Equity Committee will consider and or review such matters, and make recommendations, accordingly, to the School Committee.

ADDENDUM

Per Pupil Rate for PTO Spending

The annual amount an elementary school PTO may spend for costs related to School Operations may not exceed *a total amount calculated by multiplying projected number of students at the school by a 'per pupil' rate.*

The per pupil rate needed to calculate the cap for each elementary school was originally the same as the rate calculated in the School Department's Budget for per-pupil spending. However, several years ago the School Department changed the system-wide calculation, and the rate used for Equity Policy purposes was changed to be set based on an annual review by the Assistant Superintendent for Business and Finance, the Assistant Superintendent of Schools ⁽¹⁾ and the PTO Council Equity Representative (excerpt from the 2000-2001 Equity Policy Report).

The number of students projected by school is published annually, in advance of each school year at the time the annual Budget is prepared, by the school administration.

The Historical per pupil rate used for PTO Equity spending purposes for the past few years:

<u>Year</u>	<u>Rate</u>	<u>% Change from PY</u>
FY 2005	\$154.00	+6.2%
FY 2004	\$145.00	+3.6%
FY 2003	\$140.00	+1.5%
FY 2002	\$138.00	0.0%
FY 2001	\$138.10 average	+0.8%
FY 2000	\$137.00	+2.2%
FY1999	\$134.70	+27.0%
FY1998	\$105.88	

Relevant background factors relevant to consideration of the rate for per pupil spending:

- The change in the school system's per pupil spending.
- Changes in PTO budgets, which are not constrained as is the school system's budget; they may increase or decrease with differing constraints.
- Recently, more PTO's are increasing spending on equity line items. PTO Budgets for 2002-'03 showed only 1 PTO spending less than 60% of its cap on Equity spending; whereas, in 2000, 5 PTO's spent less than 60% of their caps. For FY 2003, 9 of 15 PTO are above 80% of their caps, 5 are near 60% of their caps and 1 at 46%.
- PTO's may be willing to increase spending on equity items to support their principals and schools as a supplement to constrained school department funds.

As part of its review, the group would likely refer to 1) spending on specific line items within the Newton Public School's Budget, and 2) data on recent changes in CPI. Information in the system-wide budget may provide some relevant information for the rate setting review – see note (2) below.

ELEMENTARY EQUITY POLICY, continued

The group reviewing annual rate changes has considered theory for maintaining the rate relatively consistent with prior years, barring any compelling reason to effect a particularly greater positive or negative change. One compelling reason why the rate has not been arbitrarily increased significantly in recent years is that there remains a gap in spending between the highest and lowest spending PTO's (46 to 100%). Until all PTO's spend in a comparable manner on core curriculum, a large arbitrary increase in the rate could affect equity of basic educational opportunities across the system.

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- (1) The Assistant Superintendent of Schools is currently the School Administration's representative to the Equity Committee. The Equity Policy is not intended to limit the title or person representing the School Administration, and any subsequent change to the position or title as determined by the School System Administration would be considered changed as referred to in this Policy document.
- (2) Reference information – the table below lists, for reference purposes only, the school system expenditures budgeted for curriculum, technology, textbooks and materials at the school level, which are relevant to the Equity per pupil rate. The information is listed for reference purposes and not intended to limit line items considered relevant from time to time.

2005 System Budget ref #	Line Description	2004 Amount	2005 Amount
p 58/ Col.Total	Total School Based Budgets	1,049,801	1,080,313
p 58/ Col.Total	Additional Textbook Allocations	50,000	50,000
p 42/ Line160	Software for schools	62,000	9,220
p 42/ Line161	Instructional equipment [all allocated for HS in 2004)	-	374,480
p 42/ Line158	Library Technology	-	30,000
p 43/ Line 182	New textbooks	420,000	120,000
p 43/ Line 183	Replacement textbooks	50,000	50,000
p 43/ Line 184	Instructional materials	20,000	20,000
	Total of line items	\$1,651,801	\$1,734,013
	# Students Projected in Budget	11,383	11,232
	Base of instructional spending per pupil	\$145	\$154