



School Allocation Process Procedure (BUD-P501)

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

1.0 SCOPE:

1.1 This procedure outlines the handling of school allocation process-first round.

2.0 RESPONSIBILITY:

- 2.1 Executive Cabinet
- 2.2 Chief Financial Officer

3.0 APPROVAL AUTHORITY:

	<i>(Approval signature on file)</i>	
3.1 Executive Cabinet	_____ Signature	_____ Date
	<i>(Approval signature on file)</i>	
3.2 Chief Financial Officer	_____ Signature	_____ Date

4.0 DEFINITIONS:

- 4.1 "WCSD Staffing Allocations": A document created and approved by the Executive Cabinet that defines district staffing ratios. The document is refined for internal use by the Human Resources Department under the supervision of the Assistant Superintendent.
- 4.2 "TBA": The District Staffing Ratios document 4.1 above, with upgrades.

5.0 PROCEDURE:

- 5.1 Enrollment projections for next school year.
 - 5.1.1 Planning provides enrollment projections by school for next school year in January.
 - 5.1.2 Enrollment projections are sent to principals for comments and input to be returned to Planning in February.
 - 5.1.3 Planning adjusts projections for input received from principals and sent to the Business Department in February.
 - 5.1.4 Adjusted projections are modified on a pro rata basis so total District enrollment equals the budgeted enrollment calculated by the Business Department. The budgeted enrollment increase (decrease) is determined by the Superintendent on a conservative basis each year. Estimated growth has been between 2.3% and 3.4% in recent years and has been held to between 2.0% and 2.4% for budgeting and allocation purposes in recent years. [Enrollment growth dropped to 0.5% in fiscal year 2005-2006, and a strategic Projection Study Group has been formed to analyze this issue.]



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5.2 Preliminary allocations process.

- 5.2.1 The Business Department provides draft allocation sheets to the Executive Cabinet that include adjusted projected enrollment by grades K, 1-2, 3, 4-6, middle schools and high schools for all schools. Summary district-wide allocation sheets are also provided.
- 5.2.2 The Business Department also provides total "extra" allocations (above the formula allocations) that have been included in the budget based on historical and other factors. Before being budgeted for the next year, these "extra" allocations are reviewed and justified to determine whether they should continue.
- 5.2.3 The Executive Cabinet conducts allocation meetings where the formula and "extra" allocations are allocated based on enrollment and various other factors.
- 5.2.4 The Business Department inputs the agreed upon allocations into the allocation worksheets and reconciles the totals to the budgeted totals.
- 5.2.5 Human Resources/Business Department issues preliminary allocation memos to the schools in February for comments and further input by the schools. Responses from the schools are returned to the Executive Cabinet in February.

5.3 Final allocations process.

- 5.3.1 The Executive Cabinet conducts additional allocation meetings where the allocations are further adjusted and fine-tuned to include the latest information received. Final allocations are determined in February and given to the Business Department for finalizing the allocation worksheets and tying to the budget.
- 5.3.2 Human Resources/Business Department issues allocation memos in February to the schools that show each school's projected enrollment, student to teacher ratios and preliminary allocations.

5.4 Process for allocations of counselors, Special Education and ESL

- 5.4.1 Allocations for counselors, Special Education and ESL are distributed at a later date.

5.5 Process for allocations of gifted and talented, alternative education teachers, deans, assistant principals, library and music.

- 5.5.1 Allocations for gifted and talented, alternative education teachers, deans, assistant principals, library and music are reviewed and adjusted based on the Staffing Allocations Guidelines and other factors. Increases (decreases) in staffing are reviewed by the Business Department which confirms they are included in the budget and added to the School Allocation Excel Spread Sheets. Allocations are distributed at a later date.



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5.6 Human Resources communicates timeline and procedure for overages and placements.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 WCSD “Staffing Allocations” document
- 6.2 Enrollment Projections by School per Planning
- 6.3 School Allocation Excel Spread Sheets
- 6.4 “Extra” Allocations Spread Sheets
- 6.5 Preliminary Allocations Memos
- 6.6 Final Allocations Memos
- 6.7 Counselors, Special Education and ESL Allocations Spread Sheets
- 6.8 Gifted & Talented, Alternative Education Teachers, Deans, Assistant Principals, Library and Music Allocations Spread Sheets

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Protection</u>	<u>Disposition</u>
WCSD “Staffing Allocations” document	Electronic copy on local drive with backup to “H” drive each time revised	Permanent	Password protected on local drive	Permanent
Enrollment Projections per School per Planning	Hard copy in PC Binder, electronic copy on local drive with backup to “H” drive each time revised	6 years	Password protected on local drive	Discard as desired
School Allocation Spread Sheets	Hard copy in PC Binder, electronic copy on local drive with weekly backup to “H” drive	6 years	Locked file for hard copy, PC Excel Spread Sheet to be password protected	Discard as desired



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“Extra” Allocations Spread Sheets	Hard copy in PC Binder, electronic copy on local drive with weekly backup to “H” drive	6 years	Locked file for hard copy, PC Excel Spread Sheet to be password protected	Discard as desired
Preliminary Allocations Memos	Hard copy in PC Binder, electronic copy on local drive with backup to “H” drive each time revised	6 years	Locked file for hard copy, PC Excel Spread Sheet to be password protected	Discard as desired
Final Allocations Memos	Hard copy in PC Binder, electronic copy on local drive with backup to “H” drive each time revised	6 years	Locked file for hard copy, PC Excel Spread Sheet to be password protected	Discard as desired
Counselors, Special Education and ESL Allocations Spread Sheets	Electronic copy on local drive with backup to “H” drive each time revised	6 years	Password protected on local drive	Discard as desired
Gifted & Talented, Alternative Education Teachers, Deans, Assistant Principals, Library and Music Allocations Spread Sheets	Electronic copy on local drive with backup to “H” drive each time revised	6 years	Password protected on local drive	Discard as desired

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
11/28/05	A	Initial Release

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