



# WCPSS School Allotment & Staffing Processes

Finance Committee  
June 7, 2022

# School Allotment and Staffing Processes

## Today

- School Allotment Process including:
  - Allotment formulas
  - Allotment application
  - Self Allotment
  - Conversions
  - Reconciliation
  - Targeted Enrollment
- School Staffing Process including:
  - Spring & Fall recruiting activities
  - School Staffing Plans
  - Transfers

# Timeline

<b>Date</b>	<b>Allotment Process</b>	<b>Staffing Process</b>
February 1		Transfer application opens
March 17	Student assignment membership projections by school & grade	
March 24	Allotments due from program managers	
March 26		Teacher job fair – early hire day
April 14	Allotments due from special programs	
April 23		Spring job fair
April 29	Allotments due from Title I	
May 5		Virtual spring job fair
May 20		Transfer application period closes
June 1		Staffing plans due to HR
July 14		Support staff virtual job fair
August 29	Day 1 reporting all schools	
September 12	Day 10 reporting all schools	
September 19	Day 15 reporting all schools	
September 27	Day 20 reporting all schools	
October	Allotment reconciliation	
November 20		Fall Job Fair
November 30	Conversion and extended employment requests due	

# Allotments and Position Control

Over 80 percent of the school system's operating budget or \$1.7b is spent on salaries and benefits.

To provide internal control for staffing, the school system uses "position control". This is a process of controlling the hiring of staff within a budget of months, to prevent the possibility of hiring positions beyond those included in the budget.

Schools receive two types of allotments: position allotments and dollar allotments. Position allotments include salaries and benefits and are distributed in months of employment (MOE) rather than dollars. Dollar allotments are for expenditures such as supplies and materials and contracted services.

There are several categories of position allotments and dollar allotments. Every school receives position allotments for classroom teachers, principals, assistant principals, support & clerical staff. Elementary schools receive position allotments for instructional assistants. Additional allotments (e.g., Title 1) are provided to eligible schools.

# Allotment Formulas

Schools earn resources based on formulas.

The [School Allotment Manual](#) describes each type of resource and defines their formulas. The manual also includes the program manager and any conversion allowances.

## Instructional Assistant - Regular Classroom

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**Contact:**

**Conversions:** No

**Description:** Allotments are calculated using student registration data for Grades 1-2 and projections of student membership for kindergarten as of March for the subsequent year. Principals may self-allot additional months if needed between March and day 20 of the school calendar if membership appears to be coming in higher. Principals should hold back vacant months if membership appears to be coming in lower. Actual allotment for each school will be based on day 20 student membership. All students in kindergarten through Grade 2 are reported. Pre-school students are not included.

**Formula:**  $=\text{ROUND}(((K/21/3*2) + (Grade1/21/2*1) + (Grade2/21/2*1) + (Grade3/21/3*1)),0)*10$

# Focus on Allotments

Focus on Allotments is an annual newsletter providing information about allotment and staffing process.

**Focus on**  
**ALLOTMENTS**

*Administrative Services will provide timely and accurate business and human resource management support that promotes informed decision making, accountability, and learning.*

Special Edition

MARCH 2022

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# Transparency

Transparency builds trust in the allocation of resources to schools.

The allotment application is visible to all staff on WakeConnect. Principals can review data for any school.

The School Allotment Manual defines all formulas.

Any allotments beyond formula are displayed on the allotment application with comments explaining the reason for the allotment.

All conversions are displayed on the allotment pages.

There are checks and balances, so the allotment application remains balanced daily to the Oracle financial system.

# Classroom Teacher and Program Enhancement Formula

Elementary schools have a K-5 Program Enhancement allotment *separate* from the Classroom Teacher formula.

## **Elementary Classroom Teacher:**

$\text{Round}((\text{Kindergarten}/18 + \text{Grade1}/16 + (\text{Grade2} + \text{Grade3})/17 + (\text{Grade4} + \text{Grade5})/24), 0) * 10$

## **K-5 Program Enhancement**

A standard base of 30 MOE are provided to each school. Schools with over 500 students in traditional, modified and operating on Track 4, and with over 515 students in year-round schools will receive additional months at a 1:15 ratio.

Middle and high schools have a single allotment for classroom teacher in all subject areas including program enhancement. Class schedules each year determine how many of the months will be needed for program enhancement courses.

## **Middle School:**

$\text{Round}((\text{Grade6})/24 + (\text{Grade7} + \text{Grade8})/23), 0) * 10$

## **High School:**

$\text{Integer} ((\text{Grade9} + \text{Grade10} + \text{Grade11} + \text{Grade12})/27.97) * 10$

Fixed allotment of 18 MOE scheduling assistant. No allotment to alternative schools, early colleges, or academies. High school program enhancement MOE are allotted as a standard allotment of 5 MOE for each traditional high school. Schools with 250 students or less receive 0-3 MOE based on academic program needs. CROSSROADS Flex, Longview, Phillips, and SCORE Academy do not receive this allotment.

# Planning Allotment

In the spring, Student Assignment staff provide student registrations for Grades 1-12 and projections of student membership for kindergarten by school to Technology staff to load to the Allotment Application.

<i>Allotment Calculations (2022-2023) – Alston Ridge Elementary</i>									
	Student Membership							MOE	
	K	01	02	03	04	05	Total	K-05 Classroom Teacher	Instructional Assistant
What If Projections	180	172	185	183	180	180	1080	570.00	170.00
Planning Allotment	168	168	169	181	181	151	1018	540.00	160.00
Self-Allotment								0.00	0.00
20th Day Adjustments								0.00	0.00
<b>Allotment Total</b>								540.00	160.00
Day 01	0	0	0	0	0	0	0	0.00	0.00
Day 10	0	0	0	0	0	0	0	0.00	0.00
Day 15	0	0	0	0	0	0	0	0.00	0.00
Day 20	0	0	0	0	0	0	0	0.00	0.00
Variance								540.00	160.00
Conversions								0.00	0.00



# Planning Allotment

The planning allotment generates Teacher-Regular Classroom and Instructional Assistant-Regular Classroom months of employment (MOE) based on the current formulas.

<i>Allotment Calculations (2022-2023) – Alston Ridge Elementary</i>									
	Student Membership							MOE	
	K	01	02	03	04	05	Total	K-05 Classroom Teacher	Instructional Assistant
What If Projections	180	172	185	183	180	180	1080	570.00	170.00
Planning Allotment	168	168	169	181	181	151	1018	540.00	160.00
Self-Allotment								0.00	0.00
20th Day Adjustments								0.00	0.00
<b>Allotment Total</b>								540.00	160.00
Day 01	0	0	0	0	0	0	0	0.00	0.00
Day 10	0	0	0	0	0	0	0	0.00	0.00
Day 15	0	0	0	0	0	0	0	0.00	0.00
Day 20	0	0	0	0	0	0	0	0.00	0.00
Variance								540.00	160.00
Conversions								0.00	0.00

In the example shown above, the school would initially receive 540.00 Teacher-Regular Classroom MOE and 160.00 Instructional Assistant-Regular Classroom MOE based on a planning allotment of 1,018 students.

# Program Allotments

Program managers of other resources (CTE, Counselor, LEP, Program Enhancement, etc.) use the planning allotment to calculate MOE to be distributed to the schools and submit the allotments to be loaded to the allotment application page for each school.

Instructional Services Allotments	MOE	Conv/Rev	Net Total	Comments
Alternative Learning Centers	10.00	0.00	10.00	
At-Risk Student Services	15.00	0.00	15.00	
Athletic Director/Athletic Trainer	3.00	0.00	3.00	2 MOE Athletic Director; 1 MOE Athletic Trainer
Career Technical Education	220.00	0.00	220.00	180 MOE CTE Teacher, 10 MOE Curriculum and Instruction Management, 20 MOE Career Development Coordinator, 10 MOE Special Populations Coordinator
Counselor	82.00	0.00	82.00	
Gradpoint	10.00	0.00	10.00	
Intervention	5.00	0.00	5.00	
Intervention K-12 - COVID Response	15.00	0.00	15.00	5 MOE Intervention Coordinator (PRC 181 - Obj 131); 10 MOE Teacher - Intervention (PRC 181 - Obj 121); This allotment will be re-evaluated whether it will continue after 2022-23.
Limited English Proficiency	5.00	0.00	5.00	
Program Enhancement	0.00	261.00	261.00	School converted 261 MOE Teacher - Regular Classroom to 261 MOE Teacher - Regular Classroom - PET

# Self Allotments

Using planning data, the allotment process begins in the Spring for the subsequent school. WCPSS allotments for each school are earned based on student membership as of day 20 of the traditional calendar in late September.

It is optimal when allotments at the beginning of the school year are as close as possible to what will be earned on day 20 data. This minimizes changes in classes after the start of the school year. Principals can “self allot” positions if they determine student membership is likely to be higher than the planning allotment. If approved by the area superintendent, the self allotted positions are added to the allotment page and Oracle.

If a principal thinks student membership may come in lower than the planning numbers, they will purposefully leave some positions vacant since they will be reduced after day 20 reconciliation.

In the example below, the school requested and was approved to self allot 10 MOE Teacher-Regular Classroom and 10 MOE Instructional Assistant-Regular Classroom.

<i>Allotment Calculations (2022-2023) – Olive Chapel Elementary</i>									
	Student Membership							MOE	
	K	01	02	03	04	05	Total	K-05 Classroom Teacher	Instructional Assistant
What If Projections	168	175	161	170	150	173	997	530.00	160.00
Planning Allotment	158	158	160	160	171	171	978	520.00	150.00
Self-Allotment								10.00	10.00

# Conversions

State law and WCPSS procedures allow principals to convert vacant positions from one type to another in some circumstances.

Principals can request conversions based on their schools' strategic plan. If approved, the conversions are effective for one fiscal year at a time.

Position numbers in Oracle are adjusted and conversions are recorded on the school's allotment page.

Date

School



## CONVERSION REQUEST

*Flexible Use of Position*

I request the conversion of the vacant positions listed below. I understand that the conversion will remain in effect for the remainder of the fiscal year. I certify that this conversion has been reviewed and approved in accordance with the School Improvement Plan and will not interrupt our ability to provide services as stated in the various IEPs. I further certify that the school will maintain recommended class sizes in accordance with state law. Conversions requested within the State Public School Fund (Fund 1) must be in accordance with the NCDPI Transfer Policy as defined by state law. All conversions are subject to review by program managers and area superintendents. Conversions will be processed upon final approval. Principals may not make verbal or written commitments to staff until Administrative Services approves the conversion.

Check position type being converted: (Convert months of employment <u>FROM</u> )		List Oracle Number(s):	Total Number of MOE of the Oracle Numbers listed	Provide an explanation of your conversion request (Convert months of employment <u>TO</u> )
Assistant Principal	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Clerical Assistant	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Intervention	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
LEP	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
School Library Media Coordinator	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other (list position type):	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

# Conversions

Principals can request to transfer instructional supply dollars to months of employment (MOE) and they can request to convert months, depending on the position type, to dollars for supplies, training, tutors, etc.

MOE are worth different amounts for each position type. There is a conversion chart on the Allotments website that shows how much each position type is worth.

**Conversion Chart 2022-23**

MOE	Position Type		MOE/Dollars	Position Type or Other
1.00	Assistant Principal	=	1.10	Teacher
1.00	Clerical Assistant	=	0.45	Assistant Principal
			0.45	Counselor
			0.50	Teacher
			0.95	Receptionist
			1.00	Instructional Assistant
Instructional Supplies converted to 1 MOE =			\$7,982	Assistant Principal
			\$7,982	Counselor
			\$7,224	Teacher
			\$3,793	Receptionist or School Secretary – High School
			\$3,612	Clerical Assistant
			\$3,612	Instructional Assistant

# Position Alignment

The state requires specific account code combinations based on position names. For certified positions, employees must have appropriate licensure to be eligible for hire. Human resources staff assist schools during the hiring process, so these requirements are met.

Examples:

- A teacher for intervention, LEP, AIG, or special education cannot be assigned to a regular classroom teacher position.
- An employee serving in the role of Instructional Facilitator, Coordinating Teacher, Literacy or Instructional Coach cannot be assigned to a classroom teacher position.
- An employee working as a clerical assistant in the office cannot be assigned to a classroom instructional assistant position.

# Reconciliation

Reconciliation is the process of adjusting planning allotments to those earned based on actual student membership. A school is reconciled when the months in Oracle exactly match the allotments showing on their allotment webpage.

Principals enter actual student membership on days 1, 10, 15, and 20 of the traditional calendar into the allotment application. Technology Staff confirm that the numbers entered reconcile with the information in PowerSchool. Then the reconciliation process begins.

	Student Membership							MOE	
	K	01	02	03	04	05	Total	K-05 Classroom Teacher	Instructional Assistant
What If Projections	86	92	85	94	91	80	528	280.00	80.00
Planning Allotment	90	95	89	92	94	81	541	290.00	90.00
Self-Allotment								10.00	0.00
20th Day Adjustments								-20.00	-10.00
Allotment Total								280.00	80.00
Day 01	81	87	83	88	90	77	506	270.00	80.00
Day 10	82	88	84	88	91	77	510	270.00	80.00
Day 15	84	89	84	91	90	78	516	280.00	80.00
Day 20	86	90	85	94	91	80	526	280.00	80.00



# Reconciliation

The number of months of employment a school earns will change based on the difference in the planning allotment loaded in the Spring and actual student enrollment on day 20.

Program managers revise allocations for each schools using the day 20 data.

	K	01	02	03	04	05	Total	K-05 Classroom Teacher	Instructional Assistant	
What If Projections	66	65	85	86	66	82	450	240.00	70.00	
Planning Allotment	70	58	70	77	60	69	404	220.00	60.00	
Self Allotment								0.00	0.00	
20th Day Enrollment	Additional MOE earned due to increased enrollment on Day 20								20.00	10.00
Allotment Total								240.00	70.00	
Day 01	67	62	69	84	54	73	409	220.00	70.00	
Day 10	75	67	74	88	59	79	442	240.00	70.00	
Day 15	76	68	75	89	58	80	446	240.00	70.00	
Day 20	79	69	75	90	58	84	455	240.00	70.00	

	Student Membership							MOE		
	K	01	02	03	04	05	Total	K-05 Classroom Teacher	Instructional Assistant	
What If Projections	86	92	85	94	91		528	280.00	80.00	
Planning Allotment	90	95	89	92	94	81	541	290.00	90.00	
20th Day Enrollment	MOE reduced due to Day 20 enrollment being lower than planning allotment								10.00	0.00
Allotment Total								280.00	80.00	
Day 01	81	87	83	88	90	77	506	270.00	80.00	
Day 10	82	88	84	88	91	77	510	270.00	80.00	
Day 15	84	89	84	91	90	78	516	280.00	80.00	
Day 20	86	90	85	94	91	80	526	280.00	80.00	

# Reconciliation

From the beginning of the allotment process through day 20, the area superintendents, human resources administrators, budget staff, and technology staff work closely with principals.

If the school earns more months based on actual student enrollment, Budget staff add positions to Oracle and send position numbers to the principal, HR administrator, and area superintendent. Principals post, recruit, and hire staff for the positions.

If the schools earns less months based on actual student enrollment, principals work with their HR administrators to identify positions for Budget staff to close. Optimally, the principal did not fill all of their positions, so the vacant positions are turned off in Oracle.

If the schools earns less months, and all positions are filled, options to reconcile include:

- Principal requests a conversion from another vacant position type or from a non-personnel allotment to cover the position for one year
- Human resources assists in reassigning staff from one school to another where there are available positions
- Area superintendents provide a targeted enrollment allocation to the school for one year only “beyond formula”

# Targeted Enrollment

- Tools to assist schools during the year with unexpected staffing challenges or needs
  - Class size issues
  - Leave situations
  - Minimizing impact to classes across tracks
  - Program impacts
- 300 months of employment budgeted each year as “targeted enrollment”
- Area Superintendents assist / coordinate with school administration
- Additional months generally set up as special project reserve in fund balance
- Added to school’s allotment page and to Oracle for one year

# Staffing

## Staffing Plans

- Detailed Plan developed by school administration in the Spring for the next year
- Considers current year staffing, next year student projections, and projected allotments
- HR Staff Administrators & Area Superintendents assist
- Plans use of existing staff, needs to hire, & potential placements
- Utilized by HR to coordinate hiring needs, employment commitments, & assist schools

# Staffing

## Recruiting Events & Activities – February → May

### Education Fairs

- WCPSS attends ≈ 35
- HBCU College, College & University
- North Carolina & other states targeted

### WCPSS Job Fairs

- Early Hire Fair – March 26
- Spring Job Fair – April 23
- Spring Virtual Job Fair – May 5
- Support Staff Virtual Job Fair – July 14
- Fall Job Fair - November

# Staffing

## Recruiting Events & Activities – October → November

### Education Fairs

- WCPSS attends ≈ 15
- HBCU College, College & University
- North Carolina targeted

# Staffing

## Other Initiatives

### WCPSS Early Contract Program

- All schools have the option to offer Early Contracts to candidates who may not have completed all required prerequisites to hire

### Future Teachers Program

- WCPSS program that identifies high school seniors who meet specific criteria and have been accepted to a college or university to major in education

### Student Teacher Pipeline

- WCPSS is using the current Student Teacher platform as a recruiting tool to solicit those teachers in various disciplines

### Substitute Teacher Pipeline

- The district has approximately 3,100 Substitute Teachers

# Staffing

## Other Recruitment Initiatives

### NAS Marketing



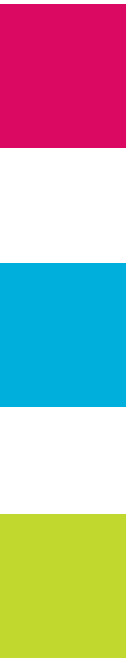
- Recruitment Marketing
- Assists with the digital footprint
- Alignment between candidate experience & targeted positions

### Virtual Information Sessions

- Departmental virtual meetings
- Invited candidates interact directly with hiring managers regarding vacancy opportunities

# WCPSS Allotment Process

## Q&A





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