

NEWTON

PUBLIC SCHOOLS

100 Walnut Street, Newtonville, MA 02460-1398

Joseph Russo
Assistant Superintendent for Elementary Education
Telephone: (617) 559-6105
Fax: (617) 559-6158

Memorandum

To: David Fleishman, Superintendent of Schools

From: Joseph Russo, Assistant Superintendent for Elementary Education

Date: April 3, 2014

Re: **Equity Policy**

The PTO Council has done a careful review of the existing Elementary Equity Policy and has made some significant revisions in both language and substance. Of note is the proposed change to how technology is funded within the equity spending cap. The original policy stated, "PTO's may help their schools acquire up to the School Department's goal for technology in accordance with the school's technology plan" (July 2004). The current proposal calls for a \$25 per pupil technology cap with an ability to bank these funds for up to 3 years. It also provides an exemption for PTO's at schools that have not met the Newton Public Schools (NPS) standard to submit a larger fundraising plan to an Equity Review Board who will review, amend and/or approve the additional fundraising. The Equity Review Board is proposed to consist of PTO Council, School Department, and School Committee members.

At Monday's meeting, the PTO Council Presidents Jennifer Abbot, Theresa Fitzpatrick and Freida Dweck will present the proposed changes and feedback from the PTO Council. Joe Russo and Leo Brehm will join them to answer questions from the Committee. A vote is not expected to be taken at this meeting.

Attachments for your review include the current and proposed policies, including one with track changes, a current analysis of technology equipment by school, and a chart showing progress towards the standard by school.

JR/mm
Attachment

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.

ELEMENTARY EQUITY POLICY, continued

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.

-
- (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

Overview of Proposed Elementary PTO Spending Categories - Revised, March 2014

**RESTRICTED
Core Curriculum**

PTO spending is **not allowed** on these items

- Staffing
- Texts
- School-based Staff Development
- Technology Infrastructure, Peripheral Technology & Technology Maintenance
- Computer Software

**TECHNOLOGY
Core Curriculum**

Spending subject to **Allowed Technology Equity Spending cap** =
 $\$25 \times \# \text{ students}$
 (beginning in FY14-15)* and allowed only up to the School Department's Technology Access Standard

- Classroom access devices

**Requests for PTOs to spend beyond the Allowed Technology Equity Spending cap may be made to the Equity Committee who will determine if such spending should be permitted.*

Additionally, Allowed Technology Equity Spending can be "banked" for up to 3 years.

**NON-TECHNOLOGY
Core Curriculum**

Spending subject to **Allowed Non-Technology Equity Spending cap** =
 $\$189.62 \times .55$
 $\times \# \text{ of students}$
 (for FY13-14)

- Staff Development - Single or small group
- Creative Arts & Science
- Libraries
- Curriculum Support
- Teacher Classroom Support
- Principal Discretionary Funds
- Field Trips

**UNCAPPED ALLOWABLE
SPENDING**

Considered non-Equity line items in PTO budgets and not subject to any spending restrictions

- Non-curriculum related PTO Expenditures (e.g. newsletters/websites, directories, 5th grade activities, hospitality, community events, PTO Administration, etc.)
- Playgrounds
- Grants

- ◆ # of students is determined by the # of students actually enrolled at each school as of Oct. 1 or the projected number of students for a given year based on the NPS Enrollment Analysis report, whichever is greater
- ◆ As in the current Elementary Equity Policy, the per pupil rate for both the Allowed Technology Equity Spending cap and the Allowed Non-Technology Equity Spending cap will be modified annually based on the CPI adjustment for the Northeast Region as of June of the current year and/or at the request of the Equity Committee following their annual review of the PTOC Equity Report and other relevant data.

ELEMENTARY EQUITY POLICY

The purpose of this policy is to set forth limitations on certain PTO spending at the elementary schools in order to prevent the occurrence of inequities between schools in the provision of core curriculum items and materials.

In the event that such inequities develop, the School Department will seek to allocate its resources to mitigate the inequities and balance core curriculum resources among all elementary schools.

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 are 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 subject to the provisions of this policy.

Certain School Operations, described below as Restricted Core Curriculum, may not be funded by PTOs.

School Operations described below as Technology Core Curriculum Subject to Spending Limitations may be funded by PTOs, but monies spent in this area are limited as described below.

Other School Operations, described below as Non-Technology Core Curriculum Subject to the Equity Cap, may be funded by PTOs, but monies spent in this area are capped to an amount equal to "**Allowed Non-Technology Equity Spending**" based on the following formula:

of projected students or # of students actually enrolled, whichever is greater, as of October 1st, x [the annual Per Pupil Equity Rate¹] x .55 = Allowed Equity Spending.

¹ Refer to the attached Appendix A for further discussion on the Per Pupil Equity Rate.

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 consistent 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. 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 School principals, after consultation with the appropriate coordinator. They will generate a list of these items yearly and deliver such list to the PTO Council by no later than May 30.

The School Committee, the School Department and the PTO Council agree that, effective as of the 2014/2015 school year, all technology, including hardware, software and associated support, will be considered Core Curriculum items that are subject to the principles of equity laid out in this policy. It is the responsibility of the School Department to develop a technology plan for the entire school district that includes infrastructure, hardware, software, maintenance, and staff training and development². That technology plan should include a "Technology Access Standard" that outlines the goal for "Classroom Access Devices"³ at each school level to be acquired under the School Department's technology plan. . The School Department will deliver the Technology Access Standard to the PTO Council yearly by no later than May 30.

Funding of Core Curriculum by PTOs shall be limited as follows:

I. Restricted Core Curriculum

PTO money may not be spent for the following core curriculum items:

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).

² Refer to the Attached Appendix B for further information about the School Department's technology plan, its goals for technology, the Technology Access Standard, individual schools' technology plans, monitoring of technology inventories, and other provisions regarding technology.

³ In 2014, classroom access devices include laptops, desktops, and iPads. Since technology is rapidly changing, what constitutes "classroom access devices" will be outlined in the Technology Access Standard.

Texts. PTO money may not be spent on textbooks and trade books used as texts. Trade books will be considered to be texts if a classroom purchases more than ten (10) copies of a specific book.

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.

Technology Infrastructure, Peripheral Technology & Maintenance. PTO money may not be spent on technology infrastructure, nor on peripheral technology (ie. anything that is not a Classroom Access Device) such as photocopiers, printers, projectors and digital cameras, whether such equipment is to be used in the classrooms or elsewhere in a school building, nor on the maintenance of any technology (including repair of Classroom Access Devices, purchase of batteries, light bulbs and toner, and any other maintenance required).

Computer Software. PTO money may not be spent on computer software that is not part of a predetermined software bundle included in newly purchased access devices, in which case they will be included in the spending limitations outlined below for Classroom Access Devices.

II. Technology Core Curriculum Subject to Spending Limitations

PTO dollars may be used to purchase Classroom Access Devices **only**, in accordance with the affected school's technology plan⁴, subject to the following limitations:

- A. PTO expenditures for Classroom Access Devices may not exceed "**Allowed Technology Equity Spending**" based on the following formula:

of projected students or # of students actually enrolled, whichever is greater, as of October 1st, x [the annual Per Pupil Technology Equity Rate⁵] = Allowed Technology Equity Spending".
- B. A PTO may not purchase Classroom Access Devices in excess of the maximum outlined in the Technology Access Standard for its school, even if such purchases may be within the Allowed Technology Equity Spending Amount.
- C. Any PTO may elect to "bank", or hold in reserve, their Allowed Technology Equity Spending amount for up to three years, and then use the aggregate of that banked amount to purchase Classroom Access Devices up to the

⁴ Refer to the Attached Appendix B for further information about schools' technology plans.

⁵ Refer to the attached Appendix A for further discussion on the Per Pupil Technology Equity Rate.

Technology Access Standard. All such banked amounts must be reported to the PTO Council each year.

Exemption:

Since spending on technology previous to the 2014/2015 school year was unrestricted and not subject to an equity cap, and since to date the School Department budget has not been able to sustain the acquisition of technology to the Technology Access Standard, PTOs will be permitted, in any particular school year, to spend monies beyond the Allowed Technology Equity Spending cap in order to reduce inequities between elementary schools with regard to technology and to bring technology inventories up to the Technology Access Standard, subject to the following:

- (1) any PTO desiring to spend monies on Classroom Access Devices beyond the Allowed Technology Equity Spending cap must first notify the Equity Committee of such desire within 30 days prior to a scheduled meeting of the Equity Committee⁶, and request permission of the Equity Committee to spend monies beyond the amount allowed up to the Technology Access Standard. Such notification should include (i) a current inventory of their school's Classroom Access Devices (including access devices that may be located in parts of the school building other than classrooms) prepared by that school's IT specialist, together with the principal and the PTO; (ii) a list of equipment that the PTO seeks to purchase for their school, and (iii) the anticipated dollar amount that is required to purchase that equipment.
- (2) the Equity Committee will review the PTO's request to spend additional funds and will determine, based on information provided by the PTO, information that may be supplied by the School Department regarding the requesting school's technology inventory, the current Technology Access Standard, and the requesting school's technology status relative to the Technology Standard, whether that PTO will be permitted to fund technology beyond the Allowed Technology Equity Spending cap, and the number of devices that it will be allowed to purchase.

Only PTOs that undergo a review by the Equity Committee and obtain the approval of the Equity Committee will be permitted to spend beyond the Allowed Technology Equity Spending cap.

This exemption to the Allowed Technology Equity Spending cap shall be in effect for a period of two years from the effective date of this revised policy, after which time the Equity Committee will review the provisions of this policy to determine if

⁶ See the section below entitled *Continuation of the Equity Committee* for a description of meeting times for the Equity Committee.

the inequities among schools with regard to technology spending are decreasing and more schools are reaching the Technology Access Standard.

In subjecting technology to PTO spending limitations, the School Department is making a commitment to providing technology equitably across elementary schools as it relates to Core Curriculum.

III. Non-Technology Core Curriculum Subject to the Equity Cap

PTO dollars may be used for the following core curriculum items, as long as these expenditures do not exceed the Allowed Non-Technology Equity Spending cap:

Staff Development – Single or Small Group. PTO money may be spent (through the principal's discretion) to sponsor single or small group teacher attendance at conferences and workshops (e.g., EDCO workshops, the METCO Director's Association Conference).

Creative Arts & Sciences. PTO money may be spent for costs related to all programs brought into the school in connection with the citywide Creative Arts & Sciences program.

Libraries. All PTO donations of books to the library are subject to the equity cap.

Curriculum Support. PTO money may be spent to assist purchasing supplies and other teaching materials that enrich programs. Examples include supplies for Colonial Days, subscriptions to children's educational magazines, and trade books if less than 10 copies purchased. It also includes PTO money spent to bring in people "in residence" (e.g., artists, poets, authors, scientists) who spend their time primarily working directly with the students, but who are not part of the citywide Creative Arts & Sciences program.

Teacher Classroom Support. PTO money may be provided as stipends to individual teachers to help pay for classroom supplies and other classroom needs.

Principal Discretionary Funds. PTO money may be provided to the principal to be used at the principal's discretion for purposes such as teacher workshops, textbooks, field trips for children who cannot afford them, etc.

Field Trips. PTO money may be spent on educational excursions outside the classroom.

UNCAPPED ALLOWABLE SPENDING

The following items will be considered non-equity line items in PTO budgets and will not be subject to any spending restrictions, except as provided below:

I. Non-Curriculum Related PTO Expenditures.

Expenses incurred by PTOs in performing the traditional functions of PTO's that are crucial to the life of individual schools and the school system, such as communication, community building, fundraising, and volunteerism. These expenses are outlined in Appendix D, Standard Definitions for PTO Budget Line Items⁷, lines 22 through 46.

II. Playgrounds.

Playgrounds and playground related expenses. Availability of seed money from the City for new playgrounds (historically provided on a rotating basis) will be determined by the Mayor.

III. Grants.

Every school has equal access to grants. Computers and related technology items acquired through grants must be acquired in accordance with the School Department's goals for technology and will be included in the school's technology inventory, but will not be counted towards the equity cap. Other resources received through grants will not be limited at this time, but could be monitored for future assessment.

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 in accordance with the School Committee's Gift Policy. The giver can request that his or her gift be made to a certain school and the School Department will determine if it is fair for the designated school to accept the gift. Gifts to individual elementary schools will be subject to this Elementary Equity Policy.

Acknowledgement of the monetary value of the gift is given for tax purposes and, if applicable, for equity reporting purposes.

MONITORING OF AND COMPLIANCE WITH THIS POLICY

Compliance with the provisions of this policy shall be ensured at the individual school level by the elementary school principals and individual PTOS, and at the district level by the PTO Council and the Equity Committee.

⁷ The Standard Definitions for PTO Budget Line Items (Appendix D) have been used since 1999-2001 and clarified by the Equity Committee from time to time as appropriate.

I. Monitoring of PTO Spending by Individual PTOs and Schools

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. It is recommended that principals discuss specific categories of PTO expenditures and their compliance with this policy at least once a year.

II. Financial Reporting: Monitoring of PTO Spending on a District Level

To better monitor compliance with this equity policy, PTO's must report their financial results and budget projections on an annual basis on the spreadsheet (Appendix C) provided by the PTO Council Equity Representative, and in accordance with the Standard Definitions for PTO Budget Line Items (Appendix D). The PTO Council will compile and analyze these reports and will report these findings to the Equity Committee each January.

The Equity Committee will meet, after receiving the financial report from the PTO Council Equity Representative, to review the report and determine compliance with the provisions of this policy. In the event the report shows a school PTO in violation of the provisions of this policy, the Equity Committee shall determine what action, if any, is required with regard to that violation.

CONTINUATION OF THE EQUITY COMMITTEE

This policy document reflects the work of recent Equity Committees and the collaborative efforts of the PTO Council, School Committee and School Department through the Spring of 2014.

The Equity Committee shall consist of the following: (i) up to three members of the PTO Council, one of which shall be the PTO Council Equity Representative, (ii) such members of the School Department as the superintendent determines is necessary for ensuring compliance with this policy (such members will include the Assistant Superintendent for Elementary Education, the Director of Information Technology and Library Media, the K-12 Instructional Technology Coordinator, and at least one elementary school principal; such members may also include representatives of the Assistant Superintendent for Business and Finance, the Assistant Superintendent for Secondary Education, and the Assistant Superintendent for Curriculum and Instruction), and (iii) one member of the School Committee as designated by the chairperson of the School Committee.

No later than the June 1st occurring prior to the beginning of each school year, the Equity Committee shall schedule three dates to meet during the course of the upcoming school year. Such scheduled dates should be spread evenly throughout the school

year term. The PTO Council will advise all PTOs of the dates of such scheduled meetings as soon as they are established. The Equity Committee shall use at least one such scheduled meeting date, occurring after receipt of the financial report from the PTO Council but before budget deliberations commence by the School Committee, to establish compliance with this policy by the elementary school PTOs, review the provisions of this policy and determine if changes to the policy should be recommended. The Equity Committee shall use any and all other scheduled meeting dates to consider the requests of individual school PTOs to spend PTO dollars in excess of the Allowed Technology Equity Spending cap. If no such requests are made during the course of a school year, the Equity Committee may choose to eliminate up to two of its scheduled meeting dates.

To the extent that the School Committee, the School Department administrators, or the PTO Council has specific concerns, issues or potential changes to this Equity Policy or practices, the Equity Committee will consider and or review such matters, and make recommendations, accordingly, to the School Committee.

Any changes to this policy recommended by the Equity Committee must be approved by the School Committee to become effective.

EFFECTIVE DATE OF THIS EQUITY POLICY

The effective date of this revised Equity Policy shall be the date on which the School Committee approves this policy.

APPENDIX A

Per Pupil Rate for PTO Spending

The annual amount an elementary school PTO may spend for costs related to technology may not exceed its Allowed Technology Equity Spending, *a total amount calculated by multiplying projected number of students at the school or the actual number of students at a school by a 'per pupil' technology rate.*

The per pupil technology equity rate needed to calculate the cap for each elementary school is equal to \$25.00, and will be adjusted each year by multiplying the previous year's per pupil rate by the CPI adjustment for the Northeast Region as of June of the current year. That annual number will be determined by the PTO Council Equity Representative and approved by the Assistant Superintendent for Business and Finance and the Assistant Superintendent of Schools.⁸

The annual amount an elementary school PTO may spend for costs related to non-technology related School Operations may not exceed its Allowed Non-Technology Equity Spending, *a total amount calculated by multiplying projected number of students at the school or the actual number of students at a school by a 'per pupil' rate.*

The per pupil equity 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 purposes of this Equity Policy was changed to be set based on an annual review by the Assistant Superintendent for Business and Finance, the Assistant Superintendent of Schools and the PTO Council Equity Representative (excerpt from the 2000-2001 Equity Policy Report). More recently, the per pupil rate has been calculated by multiplying the previous year's per pupil rate by the CPI adjustment for the Northeast Region as of June of the current year. It is agreed that such method of calculation will continued to be used to determine the per pupil equity rate for School Operations other than technology that are subject to the equity cap, until determined otherwise.⁹

⁸ 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 Administration would be considered changed as referred to in this policy document

⁹ Previously, the background factors relevant to determining the rate of per pupil spending included the change in the district's per pupil spending, change in PTOs budgets, which are not subject to the same constraints as the school system's budgets, and the PTOs willingness to increase spending on equity items to support their principals and schools as a supplement to constrained school department funds. 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

For purposes of both the technology per pupil rate and the per pupil rate for other non-technology School Operations:

The number of students projected by school is published annually, currently in November, in an Enrollment Analysis Report, in advance of each school year, prior to the time discussions regarding the annual Budget commence by the school administration.

The number of students actually enrolled by school for the current year is published annually, currently in November, in the same Enrollment Analysis Report as the projected number of students for the next school year is reported.

The historical “per pupil rate” used for PTO equity spending purposes is as follows:

Year	Rate	% Change from PY
FY 2014	\$189.62	+1.5%
FY 2013	\$186.82	+1.5%
FY 2012	\$184.06	+0.7%
FY 2011	\$182.82	+1.7%
FY 2010	\$178.36	0.0% ¹⁰
FY 2009	\$178.36	+5.0%
FY 2008	\$169.87	+2.3%
FY 2007	\$166.05	+5.1%
FY 2006	\$158.00	+2.6% ¹¹
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

recent years is that there remains a gap in spending between the highest and lowest spending PTO’s. 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.

¹⁰ In Fiscal Year 2010, the CPI adjustment for the Northeast Region as of June was a decrease. It was determined that the Per Pupil Rate would remain the same as the previous year in years where there was a decrease in the CPI.

¹¹ Beginning with Fiscal Year 2006, the Per Pupil Rate has been calculated by multiplying the previous year’s Per Pupil Rate by the CPI adjustment for the Northeast Region as of June of the current year.

APPENDIX B FURTHER PROVISIONS REGARDING PTO SPENDING FOR TECHNOLOGY

SCHOOL TECHNOLOGY PLANS

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.

TECHNOLOGY STANDARDS AND THE SCHOOL DEPARTMENT'S RESPONSIBILITIES

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

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 as determined by the School Department's goal for technology.

The School Department will include in its overall technology plan the Technology Access Standard (a standard that outlines the goal for Classroom Access Devices at each school level to be acquired under the School Department's technology plan). Any changes to the Technology Access Standard during the course of a school year will be communicated to PTOs as soon as possible. Attached, for reference only, as Appendix E is the "Technology Access Standard", established by the School Department for the 2013/2014 school year.

All purchases for technology will be made through approved School Department 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.

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 computers, access devices, and related equipment acquisitions at each of the schools. It is incumbent upon the School Department to use its technology resources to help all schools achieve the Technology Access Standard, mitigate current and future inequities among the schools in technology, and ensure the equitable distribution of technology resources.

In order to adequately monitor equity of technology across the schools, it is critical that ongoing inventories for each school be kept by the Information Technology Department for this purpose and presented to the Equity Committee by the Information Technology Department for review ***on an annual basis***. Technology inventories should encompass all significant technology equipment (including different types of computers and access devices as well as other technology, such as digital cameras, projectors, which are becoming increasingly important to the educational process) regardless of its funding source (School Department budget, PTOs, grants, etc.). Technology inventories should also include the age of each computer or device.

APPENDIX D

Standard Definitions for PTO Budget Line Items

Note: The expenditure line items do not include costs of fundraising. For the purposes of equity reporting, fundraising expenses can be considered netted against the income raised and not shown as an operating expense of the PTO.

Line #	Chart Label	Subject to Cap	Explanation
1	Rank		The rank reflects size of school with 1 being the largest.
2	# Pupils		Projected enrollment or actual enrollment, whichever is applicable, as published by the School Department for the applicable school year.
3	FY 'XX PTO Budgeted or Actual Operating Spending		Total of equity + non-equity line items representing operating expenses for the year (calculated in the file).When reporting actual expenses for a given year in line items below, PTO's should include expenses that were incurred in that year even if they weren't paid until the following year.
4	PTO Per Pupil Spending		The average PTO expenditure per pupil (calculated).
5	FY'XX Per Pupil Technology Equity Rate		The per pupil equity rate for technology spending, agreed upon yearly (with the Assistant Superintendent for Business and Finance) is used to calculate the maximum allowed technology spending for each school.
6	Allowed Technology Spending		The maximum allowed technology spending by school is calculated in the file as (#projected students or actual students, whichever is greater, as of October 1 st) x (Per Pupil Technology Equity Rate)
7	Actual Technology Spending		All amounts spent by a PTO in a given fiscal year for technology, which includes hardware, software and associated supports, whether spent from operating expenses, reserves or fundraising efforts.

8	Technology as a Percentage of Allowed Technology		This calculation shows how much a school's PTO spent on technology in relation to the total it could spend on technology (line 7 divided by line 6)
9	FY'XX Per Pupil Non-Technology Equity Rate		The Per Pupil Rate for non-technology equity spending, agreed upon yearly (with the Assistant Superintendent for Business and Finance) is used to calculate the maximum allowed non-technology equity spending for each school.
10	Allowed Non-Technology Equity Spending		The maximum allowed non-technology equity spending by school is calculated in the file as: (# projected students or actual students, whichever is greater, as of October 1 st) x (Per Pupil Equity Rate) x (55%).
11	Actual Non-Technology Equity Spending		The number is calculated as the sum of the non-technology equity line items, described in Lines 13 to 21.
12	Non-Technology Equity as a Percentage of Allowed Non-Technology Equity		This calculation shows how much a school's PTO spent in relation to the total it could spend on non-technology equity capped line items (line 11 divided by line 10).
13	Creative Arts & Sciences	yes	Costs for all programs brought into the school in connection with the citywide program.
14	Curriculum Support	yes	Program enrichment funds including, supplies, teaching materials and mini-grants that enrich programs and Outdoor Classroom. Examples include supplies for Colonial Days, subscriptions to children's educational magazines, and tradebooks if less than 10 copies are purchased. It also includes PTO's bringing people "in residence" (e.g. artists, poets, authors, scientists) who spend their time primarily working directly with the students and are not part of the citywide Creative Arts & Sciences program.
15	Field trips	yes	Refers to educational events that occur outside the classroom.
16	Library	yes	This line includes all PTO donations of books to the library.
17	Principal's Discretionary Funds	yes	This line is funding to the Principal to be used for discretionary purposes, such as teacher workshops, field trips for children who cannot afford them, etc. To prevent non-equity expenditures, such as lunches for teachers, from impacting the PTO's ability to fund equity capped items, principals can separately request reimbursement for the non-equity portion of principal's discretionary fund disbursements that the PTO covers, so that the PTO can

			charge the appropriate non-equity line.
18	Staff Development – Single or Small Group	yes	This includes PTO money spent (through the principal’s discretion) to sponsor single or small group teacher attendance at conferences and workshops (e.g. EDCO workshops, METCO Directors’ Association Conference).
19	Teacher Classroom Support	yes	Total amount given to teachers, including all teacher stipends. This includes classroom supplies and other needs funded to individual teachers.
20	Other equity items		
21	Gifts to School Outside of PTO Funds	yes	This refers to gifts made by individuals to the School Department for the benefit of an individual school, when the gift is of a core curriculum item that would otherwise be included in equity if purchased by the PTO.
22	5th Grade Activities	no	This refers to non-education-related activities such as graduation and yearbook, 5 th grade trips, and after-school activities such as plays occurring during the fifth grade.
23	Adult Speakers’ Programs	no	Fees paid to speakers for addressing families and guardians on educational topics.
24	Building & Grounds	no	Includes any enhancements to outdoor facilities, such as landscaping, beautification and flowers, but does not include outdoor classrooms and playgrounds. Any costs incurred in connection with building maintenance projects performed on Newton Serves day are included. It also could include related costs, such as a pizza party, for volunteers who rake or provide other similar services.
25	Childhood Assault Prevention Program	no	This cost is for a mandated program of the School Department with a flat fee per classroom.
26	Committees	no	Includes costs for such programs as social action, social responsibility, core values, academic excellence, human differences, etc.
27	Community Events	no	Community-building, non-fundraiser events such as free picnics, free Halloween fun nights, Color Day, Back to School picnic, kindergarten picnics.

28	Copying Costs/ Communications	no	Outside copying costs, printing and publishing costs.
29	Directory/Handbook	no	Costs to produce school directories and/or handbooks, including any costs associated with online directories. Directory contains class lists, with students' and parents' names, addresses, etc. Handbook lists school policies, etc. Some schools combine them into one publication.
30	Hospitality	no	Covers costs for food, decorations, amenities of PTO meetings/ events (other than teacher/ staff appreciation); an example is cookies and coffee for PTO meetings.
31	Insurance	no	Costs to procure adequate and appropriate insurance coverage for PTO activities
32	Newsletter/Website	no	Costs of the PTO newsletter and website, which serves as a communication vehicle between home and school.
33	Outreach & Donations	no	PTO's provide monetary gifts or grants to support a variety of causes. Any such payments or support would be captured here; examples are funding afterschool tuition, donations to foreign communities or projects, donations to METCO, gifts commemorating deaths, etc.
34	Playground Maintenance	no	This line is for landscaping and other work directly associated with maintaining the playground area on a routine basis. While the City is legally responsible for the playgrounds and the Department of Parks & Recreation does some repairs, PTO's may expend funds to supplement city efforts. Playground maintenance is a separate item from playground reconstruction or renovation, as described in Line 37.
35	PTO Administration	no	Recurring administrative costs of a PTO. This might include filing fees (such as to MA), bank charges, supplies (such as name tags) and other office-type costs that are not related to a specific committee or are related to the PTO's legal entity.
36	PTO Council & School Council	no	This includes dues and other costs such as for copying and for postage for related mailings or publications.
37	PTO Miscellaneous		This line item should be limited as much as possible to non-recurring and small dollar expenditures that do not fit in another category (example:

			purchase of a bulletin board).
38	Special Education	no	Expenditures for special education, including classroom and library books, a speaker, materials for Inclusive Schools Week, reimbursement for expenses related to expressions of appreciation for the special education aides and specialists (example: appreciation breakfasts).
39	Teacher Appreciation	no	This includes such non-education-related items as retirement gifts, thank you events, acknowledgments of deaths in the family, pizza etc. for the teachers.
40	Understanding Our Differences	no	This cost is for a mandated program of the School Department, and is a flat amount for each school. If included as an equity line, there would be a disproportionate impact on a small school's equity spending limit; therefore, it is included as a non-equity line item.
41	Use of Building	no	Charges imposed on PTOs for custodial services for fundraisers, meetings and other events (excluding the complimentary first five meetings) if not included in the event line item.
42	Other School Support - non equity items – listed in comments	no	List / describe amounts here, if they specifically do not fit in one of the above categories and are of larger \$'s or recurring type expenditure for your PTO.
43	Playground	no	Costs related to the renovation or reconstruction of school playgrounds. The City is legally responsible for playgrounds, and the Department of Parks & Recreation makes periodic assessments of improvements needed. However, PTO's may be called upon to raise funding necessary to supplement city funds available for major projects. This includes all replacements of major damaged parts or other major refurbishments of playgrounds. This also includes landscaping and other grounds improvement associated with the renovation or reconstruction of playgrounds, but not the routine maintenance described in Line 22.
44-46	Other – list individual items,		List other non-recurring expenditures of the PTO so that the Total shown at the bottom, in Line 41, represents everything spent in the year. List all one-time and/or major \$'s outlays, whether or not separate fundraising was/is involved. Note that all PTO expenditures here must be specifically excluded from Equity caps. Examples include purchase of an oven for the school kitchen, banquet tables.

APPENDIX E TECHNOLOGY ACCESS STANDARD

The following is the technology access standard effective for the 2013/2014 school year:

Elementary classrooms:

Kindergarten	5 devices (Laptops or Tablets)
Grades 1 through 5	5 devices (Laptops or Tablets)
Buildings	Three class sets of laptops on carts per elementary building.
Art and Music	Access to laptops/desktop pods

Libraries (citywide):

Elementary	17 mix of desktops/laptops/tablets
Middle	30 mix of desktops/laptops/tablets
High Schools	Class set with devices for sign out (various devices)

Middle Schools:

2 Class sets of laptops per team

High Schools:

Maintain current labs and grow access through carts

Assumptions Used for Developing Standard:

- No distinction between an A or B device
- A/B categorizations are no longer being used, instead, only devices that are less than 5 years old are deemed to meet the standard
- For budgetary purposes, the cost of each device is assumed to be \$1K (laptop)

ELEMENTARY EQUITY POLICY

The purpose of this policy is to set forth limitations on certain PTO spending at the elementary schools in order to prevent the occurrence of inequities between schools in the provision of core curriculum items and materials.

In the event that such inequalities develop, the School Department will seek to allocate its resources to mitigate the inequalities and balance core curriculum resources among ~~all the 15~~ elementary schools.

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 are 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 subject to the provisions of this policy.

Certain School Operations, described below as Restricted Core Curriculum, may not be funded by PTOs.

School Operations described below as Technology Core Curriculum Subject to Spending Limitations may be funded by PTOs, but monies spent in this area are limited as described below:

~~capped to an amount equal to "Allowed Technology Equity Spending" based on the following formula:~~

~~# of projected students or # of students actually enrolled, whichever is greater, as of October 1st, x [the annual Per Pupil Technology Equity Rate⁴] = Allowed Technology Spending.~~

Formatted: Indent: Left: 0"

Other School Operations, described below as Non-Technology Core Curriculum Subject to the Equity Cap, may be funded by PTOs, but monies spent in this area are capped to

⁴ ~~Refer to the attached Appendix A for further discussion on the Per Pupil Technology Equity Rate.~~

an amount equal to **“Allowed Non-Technology Equity Spending”** based on the following formula:

of projected students or # of students actually enrolled, whichever is greater, as of October 1st, x [the annual Per Pupil Equity Rate²] x .55 = 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 consistent 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. 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 School principals after consultation with the appropriate coordinator. They will generate a list of these items yearly and deliver such list to the PTO Council by no later than May 30. the end of October of each fiscal year.

The School Committee, the School Department and the PTO Council agree that, effective as of the 2014/2015 school year, all technology, including hardware, software and associated support, will be considered Core Curriculum items that are subject to the principles of equity laid out in this policy. It is the responsibility of the School Department to develop a technology plan for the entire school district that includes infrastructure, hardware, software, maintenance, and staff training and development³. That technology plan should include a “Technology Access Standard” that sets outlines goal for “Classroom Access Devices”⁴ at each school level to be acquired under the School Department’s technology plan. . The School Department will deliver the Technology Access Standard to the PTO Council yearly by no later than May 30.

Funding of Core Curriculum by PTOs shall be limited as follows:

² Refer to the attached Appendix A for further discussion on the Per Pupil Equity Rate.

³ Refer to the Attached Appendix B for further information about the School Department’s technology plan, it’s goals for technology, the Technology Access Standard, individual schools’ technology plans, monitoring of technology inventories, and other provisions regarding technology.

⁴ In 2014, classroom access devices include laptops, desktops, and iPads. Since technology is rapidly changing, what constitutes “classroom access devices” will be outlined in the Technology Access Standard.

I. Restricted Core Curriculum

PTO money may not be spent for the following core curriculum items:

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).

Texts. PTO money may not be spent on textbooks and trade books used as texts. Trade books will be considered to be texts if a classroom purchases more than ten (10) copies of a specific book.

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.

~~**Copiers.** PTO money may not be spent on photocopiers.~~

~~**Technology Infrastructure, Peripheral Technology & Maintenance.** PTO money may not be spent on technology infrastructure, nor on peripheral technology (ie. anything that is not a Classroom Access Device) such as photocopiers, printers, projectors and digital cameras, whether such equipment is to be used in the classrooms or elsewhere in a school building, nor on the maintenance of any technology (including repair of Classroom Access Devices, purchase of batteries, light bulbs and toner, and any other maintenance required).~~

~~**Computer Software.** PTO money may not be spent on computer software that is not part of a predetermined software bundle included in newly purchased access devices, in which case they will be included in the spending limitations outlined below for Classroom Access Devices.~~

II. Technology Core Curriculum Subject to the Technology Equity Cap

~~PTO's may help their schools acquire technology up to the School Department's goal for technology in accordance with each school's technology plan⁵, as long as these expenditures do not exceed the Allowed Technology Equity Spending cap. Technology includes hardware, software and associated support.~~

⁵ Refer to the Attached Appendix B for further information about the School Department's goals for technology, schools' technology plans, and other provisions regarding PTO contributions to technology.

PTO dollars may be used to purchase Classroom Access Devices **only**, in accordance with the affected school's technology plan⁶, subject to the following limitations:

A. PTO expenditures for Classroom Access Devices may not exceed "**Allowed Technology Equity Spending**" based on the following formula:

Formatted: Indent: Left: 0.5", Hanging: 0.5"

of projected students or # of students actually enrolled, whichever is greater, as of October 1st, x [the annual Per Pupil Technology Equity Rate⁷] = Allowed Technology Spending.

Formatted: Indent: Left: 1"

B. A PTO may not purchase Classroom Access Devices in excess of the maximum outlined in the Technology Access Standard for its school, even if such purchases may be within the Allowed Technology Equity Spending Amount.

C. Any PTO may elect to "bank", or hold in reserve, their Allowed Technology Equity Spending amount for up to three years, and then use the aggregate of that banked amount to purchase Classroom Access Devices up to the Technology Access Standard. All such banked amounts must be reported to the PTO Council each year.

Exemption:

Since spending on technology previous to the 2014/2015 school year was unrestricted and not subject to an equity cap, and since to date the School Department budget has not been able to sustain the acquisition of technology to the Technology Access Standard, PTOs will be permitted, in any particular school year, to spend monies beyond the Allowed Technology Equity Spending cap in order to reduce inequities between elementary schools with regard to technology and to bring technology inventories up to the Technology Access Standard, subject to the following:

(1) any PTO desiring to spend monies on Classroom Access Devices beyond the Allowed Technology Equity Spending cap must first notify the Equity Committee of such desire within 30 days prior to a scheduled meeting of the Equity Committee⁸, and request permission of the Equity Committee to spend monies beyond the amount allowed up to the Technology Access Standard. Such notification should include (i) a current inventory of their school's Classroom Access Devices (including access devices that may be located in parts of the school building other than classrooms) prepared by that school's IT specialist, together with the principal and the PTO; (ii) a

⁶ Refer to the Attached Appendix B for further information about schools' technology plans.

⁷ Refer to the attached Appendix A for further discussion on the Per Pupil Technology Equity Rate.

⁸ See the section below entitled *Continuation of the Equity Committee* for a description of meeting times for the Equity Committee.

list of equipment that the PTO seeks to purchase for their school, and (iii) the anticipated dollar amount that is required to purchase that equipment.

(2) the Equity Committee will review the PTO's request to spend additional funds and will determine, based on information provided by the PTO, information that may be supplied by the School Department regarding the requesting school's technology inventory, the current Technology Access Standard, and the requesting school's technology status relative to the Technology Standard, whether that PTO will be permitted to fund technology beyond the Allowed Technology Equity Spending cap, and the number of devices that it will be allowed to purchase.

Only PTOs that undergo a review by the Equity Committee and obtain the approval of the Equity Committee will be permitted to spend beyond the Allowed Technology Equity Spending cap.

This exemption to the Allowed Technology Equity Spending cap shall be in effect for a period of two years from the effective date of this revised policy, after which time the Equity Committee will review the provisions of this policy to determine if the inequities among schools with regard to technology spending are decreasing and more schools are reaching the Technology Access Standard.

In subjecting technology to PTO spending limitations ~~under the Allowed Technology Equity Spending cap~~, the School Department is making a commitment to providing technology equitably across elementary schools as it relates to Core Curriculum.

III. Non-Technology Core Curriculum Subject to the Equity Cap

PTO dollars may be used for the following core curriculum items, as long as these expenditures do not exceed the Allowed Non-Technology Equity Spending cap:

Staff Development – Single or Small Group. PTO money may be spent (through the principal's discretion) to sponsor single or small group teacher attendance at conferences and workshops (e.g., EDCO workshops, the METCO Director's Association Conference).

Creative Arts & Sciences. PTO money may be spent for costs related to all programs brought into the school in connection with the citywide Creative Arts & Sciences program.

Libraries. All PTO donations of books to the library are subject to the equity cap.

Curriculum Support. PTO money may be spent to assist purchasing supplies and other teaching materials that enrich programs. Examples include supplies

for Colonial Days, subscriptions to children's educational magazines, and trade books if less than 10 copies purchased. It also includes PTO money spent to bring in people "in residence" (e.g., artists, poets, authors, scientists) who spend their time primarily working directly with the students, but who are not part of the citywide Creative Arts & Sciences program.

Teacher Classroom Support. PTO money may be provided as stipends to individual teachers to help pay for classroom supplies and other classroom needs.

Principal Discretionary Funds. PTO money may be provided to the principal to be used at the principal's discretion for purposes such as teacher workshops, textbooks, field trips for children who cannot afford them, etc.

Field Trips. PTO money may be spent on educational excursions outside the classroom.

UNCAPPED ALLOWABLE SPENDING

The following items will be considered non-equity line items in PTO budgets and will not be subject to any spending restrictions, except as provided below:

I. Non-Curriculum Related PTO Expenditures.

Expenses incurred by PTOs in performing the traditional functions of PTO's that are crucial to the life of individual schools and the school system, such as communication, community building, fundraising, and volunteerism. These expenses are outlined in Appendix D, Standard Definitions for PTO Budget Line [Items, lines 18 through 40](#) [Items⁹, lines 22 through 46.](#)

II. Playgrounds.

Playgrounds and playground related expenses. Availability of seed money from the City for new playgrounds (historically provided on a rotating basis) will be determined by the Mayor.

III. Grants.

Every school has equal access to grants. Computers and related technology items acquired through grants must be acquired in accordance with the School Department's goals for technology and will be included in the school's technology inventory, and will not be counted towards the equity cap. Other resources received through grants will not be limited at this time, but could be monitored for future assessment.

GIFTS TO THE SCHOOLS

⁹ [The Standard Definitions for PTO Budget Line Items \(Appendix D\) have been used since 1999-2001 and clarified by the Equity Committee from time to time as appropriate.](#)

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 in accordance with the School Committee's Gift Policy. The giver can request that his or her gift be made to a certain school and the School Department will determine if it is fair for the designated school to accept the gift. Gifts to individual elementary schools ~~may [will?] be~~ will be subject to this Elementary Equity Policy.

Acknowledgement of the monetary value of the gift is given for tax purposes and, if applicable, for equity reporting purposes.

MONITORING OF AND COMPLIANCE WITH THIS POLICY

Compliance with the provisions of this policy shall be ensured at the individual school level by the elementary school principals and individual PTOS, and at the district level by the PTO Council and the Equity Committee.

I. Monitoring of PTO Spending by Individual PTOs and Schools

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. It is recommended that principals discuss specific categories of PTO expenditures and their compliance with this policy at least once a year.

II. Financial Reporting: Monitoring of PTO Spending on a District Level

To better monitor compliance with this equity policy, PTO's must report their financial results and budget projections on an annual basis on the spreadsheet (Appendix C) provided by the PTO Council Equity Representative, and in accordance with the Standard Definitions for PTO Budget Line Items used in the spreadsheet, as illustrated in Appendix D⁴⁰. The PTO Council will compile and analyze these reports and will report these findings to the Equity Committee each January.

The Equity Committee will meet, after receiving the financial report from the PTO Council Equity Representative, to review the report and determine compliance with the provisions of this policy. In the event the report shows a school PTO in

⁴⁰ ~~The Standard Definitions for PTO Budget Line Items (Appendix D) have been used since 1999-2001 and clarified by the Equity Committee from time to time as appropriate.~~

violation of the provisions of this policy, the Equity Committee shall determine what action, if any, is required with regard to that violation.

CONTINUATION OF THE EQUITY COMMITTEE

This policy document reflects the work of recent Equity Committees and the collaborative efforts of the PTO Council, School Committee and School Department through the Spring of 2014.

The Equity Committee shall consist of the following: (i) up to three members of the PTO Council, including the PTO Council Equity Representative, (ii) [up to three] such members of the School Department as the superintendent determines is necessary for ensuring compliance with this policy (such members may include representatives of the Assistant Superintendent for Business and Finance, the Assistant Superintendent for Elementary Education, the Assistant Superintendent for Curriculum and Instruction, and the Newton School's Technology Department), and (iii) up to three a member of members of the School Committee as designated by the chairperson of the School Committee.

No later than the June 1st occurring prior to the beginning of each school year, the Equity Committee shall schedule three dates to meet during the course of the upcoming school year. Such scheduled dates should be spread evenly throughout the school year term. The PTO Council will advise all PTOs of the dates of such scheduled meetings as soon as they are established. The Equity Committee shall use at least one such scheduled meeting date, occurring ~~The Equity Committee shall meet at least once annually,~~ after receipt of the financial report from the PTO Council but before budget deliberations commence by the School Committee, to establish compliance with this policy by the elementary school PTOs, review the provisions of this policy and determine if changes to the policy should be recommended. The Equity Committee shall use any and all other scheduled meeting dates to consider the requests of individual school PTOs to spend PTO dollars in excess of the Allowed Technology Equity Spending cap. If no such requests are made during the course of a school year, the Equity Committee may choose to eliminate up to two of its scheduled meeting dates.

To the extent that the School Committee, the School Department administrators, or the PTO Council has specific concerns, issues or potential changes to this Equity Policy or practices, the Equity Committee will consider and or review such matters, and make recommendations, accordingly, to the School Committee.

Any changes to this policy recommended by the Equity Committee must be approved by the School Committee to become effective.

EFFECTIVE DATE OF THIS EQUITY POLICY

The effective date of this revised Equity Policy shall be the date on which the School Committee approves this policy.

APPENDIX A

Per Pupil Rate for PTO Spending

The annual amount an elementary school PTO may spend for costs related to technology may not exceed its Allowed Technology Equity Spending, *a total amount calculated by multiplying projected number of students at the school or the actual number of students at a school by a 'per pupil' technology rate.*

The per pupil technology equity rate needed to calculate the cap for each elementary school is equal to \$25.00, and will be adjusted each year by multiplying the previous year's per pupil rate by the CPI adjustment for the Northeast Region as of June of the current year. That annual number will be determined by the PTO Council Equity Representative and approved by the Assistant Superintendent for Business and Finance and the Assistant Superintendent of Schools.¹¹

The annual amount an elementary school PTO may spend for costs related to non-technology related School Operations may not exceed its Allowed Non-Technology Equity Spending, *a total amount calculated by multiplying projected number of students at the school or the actual number of students at a school by a 'per pupil' rate.*

The per pupil equity 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 purposes of this Equity Policy was changed to be set based on an annual review by the Assistant Superintendent for Business and Finance, the Assistant Superintendent of Schools and the PTO Council Equity Representative (excerpt from the 2000-2001 Equity Policy Report). More recently, the per pupil rate has been calculated by multiplying the previous year's per pupil rate by the CPI adjustment for the Northeast Region as of June of the current year. It is agreed that such method of calculation will continued to be used to determine the per pupil equity rate for School Operations other than technology that are subject to the equity cap, until determined otherwise.¹²

¹¹ 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 Administration would be considered changed as referred to in this policy document

¹² Previously, the background factors relevant to determining the rate of per pupil spending included the change in the district's per pupil spending, change in PTOs budgets, which are not subject to the same constraints as the school system's budgets, and the PTOs willingness to increase spending on equity items to support their principals and schools as a supplement to constrained school department funds. 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

For purposes of both the technology per pupil rate and the per pupil rate for other non-technology School Operations:

The number of students projected by school is published annually, currently in November, in an Enrollment Analysis Report, in advance of each school year, prior to the time discussions regarding the annual Budget commence by the school administration.

The number of students actually enrolled by school for the current year is published annually, currently in November, in the same Enrollment Analysis Report as the projected number of students for the next school year is reported.

recent years is that there remains a gap in spending between the highest and lowest spending PTO's. 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.

The historical “per pupil rate” used for PTO equity spending purposes is as follows:

Year	Rate	% Change from PY
FY 2014	\$189.62	+1.5%
FY 2013	\$186.82	+1.5%
FY 2012	\$184.06	+0.7%
FY 2011	\$182.82	+1.7%
FY 2010	\$178.36	0.0% ¹³
FY 2009	\$178.36	+5.0%
FY 2008	\$169.87	+2.3%
FY 2007	\$166.05	+5.1%
FY 2006	\$158.00	+2.6% ¹⁴
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

¹³ In Fiscal Year 2010, the CPI adjustment for the Northeast Region as of June was a decrease. It was determined that the Per Pupil Rate would remain the same as the previous year in years where there was a decrease in the CPI.

¹⁴ Beginning with Fiscal Year 2006, the Per Pupil Rate has been calculated by multiplying the previous year’s Per Pupil Rate by the CPI adjustment for the Northeast Region as of June of the current year.

APPENDIX B FURTHER PROVISIONS REGARDING PTO SPENDING FOR TECHNOLOGY

SCHOOL TECHNOLOGY PLANS

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.

TECHNOLOGY STANDARDS AND THE SCHOOL DEPARTMENT'S RESPONSIBILITIES

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

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 as determined by the School Department's goal for technology.

~~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.~~

The School Department will include in its overall technology plan the Technology Access Standard (a standard that outlines the goal for Classroom Access Devices at each school level to be acquired under the School Department's technology plan). Any changes to the Technology Access Standard during the course of a school year will be communicated to PTOs as soon as possible. Attached, for reference only, as Appendix E is the "Technology Access Standard", established by the School Department for the 2013/2014 school year.

All purchases for technology will be made through approved School Department 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 to mitigate 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 computers, access devices, and related equipment acquisitions at each of the schools. It is incumbent upon the School Department to use its technology resources to help all schools achieve the Technology Access Standard, ~~equalize ratios and~~ mitigate current and future inequities among the schools in technology, and ensure the equitable distribution of technology resources.

In order to adequately monitor equity of technology across the schools, it is critical that ongoing inventories for each school be kept by the Information Technology Department for this purpose and presented to the Equity Committee by the Information Technology Department for review **on an annual basis**. Technology inventories should encompass all significant technology equipment (including different types of computers and access devices as well as other technology, such as digital cameras, projectors, which are becoming increasingly important to the educational process) regardless of its funding source (School Department budget, PTOs, grants, etc.). Technology inventories should also include the age of each computer or device.

**APPENDIX D
Standard Definitions for PTO Budget Line Items**

Note: The expenditure line items do not include costs of fundraising. For the purposes of equity reporting, fundraising expenses can be considered netted against the income raised and not shown as an operating expense of the PTO.

Line #	Chart Label	Subject to Cap	Explanation
1	Rank		The rank reflects size of school with 1 being the largest.
2	# Pupils		Projected enrollment or actual enrollment, whichever is applicable, as published by the School Department for the applicable school year.
3	FY 'XX PTO Budgeted or Actual Operating Spending		Total of equity + non-equity line items representing operating expenses for the year (calculated in the file). When reporting actual expenses for a given year in line items below, PTO's should include expenses that were incurred in that year even if they weren't paid until the following year.
4	PTO Per Pupil Spending		The average PTO expenditure per pupil (calculated).
5	FY'XX Per Pupil Technology Equity Rate		The per pupil equity rate for technology spending, agreed upon yearly (with the Assistant Superintendent for Business and Finance) is used to calculate the maximum allowed technology spending for each school.
6	Allowed Technology Spending		The maximum allowed technology spending by school is calculated in the file as (#projected students or actual students, whichever is greater, as of October 1 st) x (Per Pupil Technology Equity Rate)
7	Actual Technology Spending		All amounts spent by a PTO in a given fiscal year for technology, which includes hardware, software and associated supports, whether spent from operating expenses, reserves or fundraising efforts.

8	Technology as a Percentage of Allowed Technology		This calculation shows how much a school's PTO spent on technology in relation to the total it could spend on technology (line 7 divided by line 6)
9	FY'XX Per Pupil Non-Technology Equity Rate		The Per Pupil Rate for non-technology equity spending, agreed upon yearly (with the Assistant Superintendent for Business and Finance) is used to calculate the maximum allowed non-technology equity spending for each school.
10	Allowed Non-Technology Equity Spending		The maximum allowed non-technology equity spending by school is calculated in the file as: (# projected students or actual students, whichever is greater, as of October 1 st) x (Per Pupil Equity Rate) x (55%).
11	Actual Non-Technology Equity Spending		The number is calculated as the sum of the non-technology equity line items, described in Lines 13 to 20.
12	Non-Technology Equity as a Percentage of Allowed Non-Technology Equity		This calculation shows how much a school's PTO spent in relation to the total it could spend on non-technology equity capped line items (line 11 divided by line 10).
13	Creative Arts & Sciences	yes	Costs for all programs brought into the school in connection with the citywide program.
14	Curriculum Support	yes	Program enrichment funds including, supplies, teaching materials and mini-grants that enrich programs and Outdoor Classroom. Examples include supplies for Colonial Days, subscriptions to children's educational magazines, and tradebooks if less than 10 copies are purchased. It also includes PTO's bringing people "in residence" (e.g. artists, poets, authors, scientists) who spend their time primarily working directly with the students and are not part of the citywide Creative Arts & Sciences program.
15	Teacher Classroom Support	yes	Total amount given to teachers, including all teacher stipends. This includes classroom supplies and other needs funded to individual teachers.
16	Principal's Discretionary Fund	yes	This line is funding to the Principal to be used for discretionary purposes, such as teacher workshops, field trips for children who cannot afford them, etc. To prevent non-equity expenditures, such as lunches for teachers, from impacting the PTO's ability to fund equity capped items, principals can separately request reimbursement for the non-equity portion of principal's discretionary fund disbursements that the PTO covers, so that the PTO can charge the appropriate non-equity line.

17	Staff Development – Single or Small Group	yes	This includes PTO money spent (through the principal's discretion) to sponsor single or small group teacher attendance at conferences and workshops (e.g. EDCO workshops, METCO Directors' Association Conference).
18	Library	yes	This line includes all PTO donations of books to the library.
19	Field trips	yes	Refers to educational events that occur outside the classroom.
20	Gifts to School Outside of PTO Funds	yes	This refers to gifts made by individuals to the School Department for the benefit of an individual school, when the gift is of a core curriculum item that would otherwise be included in equity if purchased by the PTO.
21	Newsletter/Website	no	Costs of the PTO newsletter and website, which serves as a communication vehicle between home and school.
22	Copying Costs/ Communications	no	Outside copying costs, printing and publishing costs.
23	Directory/Handbook	no	Costs to produce school directories and/or handbooks, including any costs associated with online directories. Directory contains class lists, with students' and parents' names, addresses, etc. Handbook lists school policies, etc. Some schools combine them into one publication.
24	Building & Grounds	no	Includes any enhancements to outdoor facilities, such as landscaping, beautification and flowers, but does not include outdoor classrooms and playgrounds. Any costs incurred in connection with building maintenance projects performed on Newton Serves day are included. It also could include related costs, such as a pizza party, for volunteers who rake or provide other similar services.
25	Playground Maintenance	no	This line is for landscaping and other work directly associated with maintaining the playground area on a routine basis. While the City is legally responsible for the playgrounds and the Department of Parks & Recreation does some repairs, PTO's may expend funds to supplement city efforts. Playground maintenance is a separate item from playground reconstruction or renovation, as described in Line 37.
26	5th Grade Activities	no	This refers to non-education-related activities such as graduation and yearbook, 5 th grade trips, and after-school activities such as plays occurring

			during the fifth grade.
27	Use of Building	no	Charges imposed on PTOs for custodial services for fundraisers, meetings and other events (excluding the complimentary first five meetings) if not included in the event line item.
28	Teacher Appreciation	no	This includes such non-education-related items as retirement gifts, thank you events, acknowledgments of deaths in the family, pizza etc. for the teachers.
29	Understanding Our Differences	no	This cost is for a mandated program of the School Department, and is a flat amount for each school. If included as an equity line, there would be a disproportionate impact on a small school's equity spending limit; therefore, it is included as a non-equity line item.
30	Special Education	no	SPED/PAC type expenditures for special education, including books, a speaker, materials for Inclusive Schools Week, reimbursement for expenses related to expressions of appreciation for the special education aides (like appreciation breakfasts).
31	Childhood Assault Prevention Program	no	This cost is for a mandated program of the School Department with a flat fee per classroom.
32	Hospitality	no	Covers costs for food, decorations, amenities of PTO meetings/ events (other than teacher/ staff appreciation); an example is cookies and coffee for PTO meetings.
33	PTO Council & School Council	no	This includes dues and other costs such as for copying and for postage for related mailings or publications.
34	Adult Speakers' Programs	no	Fees paid to speakers for addressing families and guardians on educational topics.
35	Community Events	no	This includes community-building, non-fundraiser events such as free picnics, free Halloween fun nights, Color Day, Back to School picnic, and kindergarten picnics.
36	PTO Miscellaneous	no	This line item should be limited as much as possible to non-recurring and small \$'s expenditures that do not fit in another category (example: purchase

			of a bulletin board).
37	PTO Administration	no	Recurring administrative costs of a PTO. This might include filing fees (such as to MA), bank charges, supplies (such as name tags) and other office-type costs that are not related to a specific committee or are related to the PTO's legal entity.
38	Committees	no	Includes costs for such programs as social action, social responsibility, core values, academic excellence, human differences, etc.
39	Outreach & Donations	no	PTO's provide monetary gifts or grants to support a variety of causes. Any such payments or support would be captured here; examples are funding afterschool tuition, donations to foreign communities or projects, donations to METCO, gifts commemorating deaths, etc.
40	Other School Support - non equity items – listed in comments	no	List / describe amounts here, if they specifically do not fit in one of the above categories and are of larger \$'s or recurring type expenditure for your PTO.
41	Playground	no	Costs related to the renovation or reconstruction of school playgrounds. The City is legally responsible for playgrounds, and the Department of Parks & Recreation makes periodic assessments of improvements needed. However, PTO's may be called upon to raise funding necessary to supplement city funds available for major projects. This includes all replacements of major damaged parts or other major refurbishments of playgrounds. This also includes landscaping and other grounds improvement associated with the renovation or reconstruction of playgrounds, but not the routine maintenance described in Line 22.
42-44	Other – list individual items,		List other non-recurring expenditures of the PTO so that the Total shown at the bottom, in Line 41, represents everything spent in the year. List all one-time and/or major \$'s outlays, whether or not separate fundraising was/is involved. Note that all PTO expenditures here must be specifically excluded from Equity caps. Examples include purchase of an oven for the school kitchen, banquet tables.

APPENDIX E

TECHNOLOGY ACCESS STANDARD

The following is the technology access standard effective for the 2013/2014 school year:

Elementary classrooms:

<u>Kindergarten</u>	<u>5 devices (Laptops or Tablets)</u>
<u>Grades 1 through 5</u>	<u>5 devices (Laptops or Tablets)</u>
<u>Buildings</u>	<u>Three class sets of laptops on carts per elementary building.</u>
<u>Art and Music</u>	<u>Access to laptops/desktop pods</u>

Libraries (citywide):

<u>Elementary</u>	<u>17 mix of desktops/laptops/tablets</u>
<u>Middle</u>	<u>30 mix of desktops/laptops/tablets</u>
<u>High Schools</u>	<u>Class set with devices for sign out (various devices)</u>

Middle Schools:

2 Class sets of laptops per team

High Schools:

Maintain current labs and grow access through carts

Assumptions Used for Developing Standard:

- No distinction between an A or B device
- A/B categorizations are no longer being used, instead, only devices that are less than 5 years old are deemed to meet the standard
- For budgetary purposes, the cost of each device is assumed to be \$1K (laptop)

As of 4/1/14

School	# Rooms	(% Meet Standard)	Carts	Library	Room Remain	Cost to meet standard
Angier	19	60%	33%	100	7	\$80,000
Bowen	24	50%	66%	100	11	\$85,000
Burr	19	88%	16%	100	2	\$85,000
Cabot	20	90%	99%	100	2	\$10,000
Countryside	21	75%	33%	100	4	\$80,000
Franklin	20	100%	16%	100	0	\$75,000
Horace Mann	21	66%	49%	100	7	\$80,000
Lincoln-Eliot	16	87%	0%	100	2	\$100,000
Mason-Rice	21	66%	99%	100	7	\$35,000
Memorial-Spauldin g	21	100%	82%	100	0	\$15,000
Peirce	15	47%	99%	100	7	\$40,000
Underwood	15	87%	0%	100	2	\$100,000
Ward	14	100%	99%	100	0	0
Williams	14	100%	16%	100	0	\$75,000
Zervas	16	69%	57%	100	5	\$70,000
						\$930,000

Oak Hill Middle School - 25% (\$450,000 to meet standard)

10 Teams

5 carts

Day Middle School - 27% (\$480,000 to meet standard)

11 Teams

6 Carts

Bigelow Middle School - 43% (\$240,000 to meet standard)

7 Teams

6 carts (percentage does not include two iPad Pilot carts of 22)

Brown Middle School - 28% (\$390,000 to meet standard)

9 Teams

5 carts

03-17-14*

School Name	# Students	Total Class-rooms	Total Student/Computers	Type A	Type B	3/1714 Student/AB Comp Ratio	11/12/13 Student/AB Comp Ratio
Angier	417	19	234	44	188	1.80	2.23
Bowen	502	24	233	80	132	2.37	3.12
Burr	424	19	184	24	149	2.45	3.78
Cabot	419	20	283	45	235	1.50	2.39
Countryside	457	21	214	59	149	2.20	3.57
Franklin	397	19	182	18	155	2.29	2.68
Horace Mann	427	19	213	23	151	2.45	2.50
Lincoln-Eliot	329	16	175	26	142	1.96	2.73
Mason-Rice	457	21	274	117	154	1.69	2.61
Mem-Spaulding	429	21	285	132	148	1.53	4.45
Peirce	312	15	183	39	141	1.73	2.83
Underwood	327	15	157	42	109	2.17	3.02
Ward	289	14	208	59	145	1.42	2.46
Williams	304	14	174	32	138	1.79	2.62
Zervas	317	16	223	68	141	1.52	2.14
Total	5,807	273	3,222	808	2,277	1.92	2.88