

## **CBLT September 28, 2016**

CBLT Approved 10/19/16

### **Attending:**

David Azzarito – District  
Carmen Balgobin – District  
Rob Bixler – District  
LeighAnn Blackmore – District  
David Cintron – CTA  
Doreen Concolino – District  
Albert Davies – CTA  
Wendy Doromal – CTA  
Jason Duke – District

Gloria Fernandez – District  
Bill Floyd – District  
Theresa Harter-Miles – District  
Alex Heidelberg – District  
Allison Kirby – District  
Sharon Leonard – CTA  
Michael Marzano – CTA  
Clinton McCracken – CTA  
Phyllis Mills – CTA

Mark Mitchell - CTA  
Maribel Moskovar - CTA  
Megan Oates - CTA  
Clay Phillips - CTA  
Ron Pilgrim - District  
Krista Russell - District  
Patricia Walker - District  
Tom Winters - CTA  
Rea Xenja - CTA

Meeting began at 8:30 am with the members of the CBLT introducing themselves

### **Agenda:**

- Introduction of members
- Organizational Matters
  - Mission Statement
  - Goals
  - CBLT Policies
  - Committees
- Review of MOU's – Sign as TA's
- Contract language Updates
- Salary experience for out of state teachers
- "Gag Order" at School Board Meetings
- Collaborative Bargaining Training
- 3<sup>rd</sup> grade Portfolios
- Tutoring on Saturdays
- Insurance 101 @ 2:00 PM with Beth Curran
- Opposite sex domestic partner health benefits
- Paid FMLA

### **Organizational Matters**

The CBLT agreed upon policies to govern meetings. CTA was not in favor of having a mission statement or goals at this point. Policies are as follows:

## Bargaining Policies

- Meeting Logistics:
  - Start and End on time
  - Return from Lunch on time
  - Gatekeeper
    - Designated at each meeting
    - 3 minutes per member to speak to an issue
  - Record Keeping
    - Minutes compiled and sent to team 2 duty days prior to the next meeting
    - Minutes of immediate prior session approved at beginning of session
    - Approved minutes posted on Labor Relations website
  - Scheduling
    - Schedule meeting dates in advance
    - Calendar meeting dates and issues
  - Meeting locations:
    - Will rotate sites.
    - Every other meeting will be at the location of the Union's choice and then at District location / school
  - Meeting Chairs:
    - OCPS when at the Union building
    - Union when at a school or district location
- Agenda:
  - Chief Negotiators will agree on agenda
  - Times will be decided on each item as part of agenda development
  - Committee Reports when needed
  - Issues may be deferred once due to absence of key presenters
  - Experts/resource people may be invited to attend
- Committees:
  - Meet when issues are referred to committee
  - CBLT will issue a timeline for reports with no more than one month granted to a committee to work on and report back on issue/s
  - Co-chairs set meeting dates and times,
  - Functioning Committees shall report back to CBLT on a regular basis
- Issues:
  - 3-5 issues per side
  - Prioritize at the table
  - Any common issues first on agenda
  - After that, alternate issues
- Notices of meetings shall be posted on District Labor Relations website

#### Committees:

- Evaluation
- Appeals
- Finance & Comp
- Supplements
- Fringe Benefits – Joint with OESPA
- Compliance
- Calendar
- Grants
- CTE
- Budget Committee- joint with OESPA and Board members
- Appeals

#### Review of MOU's

- MOU #1 was the payment of the \$500 "Across the Board" increase
  - Signed as MOU on July 14, 2016
  - Agreement to pay the increase starting with the August 24, 2016 paycheck
  - Does not need to be made contract language
- MOU #2 was changes to the Evaluation article and manual.
  - Signed as MOU on August 11, 2016
  - Made TA #1 by the CBLT
- MOU #3 was the Deliberate Practice changes
  - Signed as MOU on September 16, 2016
  - Worked through and agreed to by members of the Evaluation Committee
  - Made TA #2 by the CBLT

Copies of these MOUs are attached to the minutes

MOU – to make sure we paid the \$500 out

#### Contract Language Update

- Out of State Experience for Teachers
  - In 2011, with SB 736, the provision for requiring proof of effective performance for both in state and out of state experience was removed from Florida Statutes. The CBLT has agreed to delete language from the in state language in the Salary Article. This language change does the same for out of state experience.
  - CLBT agreed and this became TA #3, MOU #4

#### "Gag order" at School Board Meetings

Wendy Doromal expressed disappointment with the prohibition currently in effect until December regarding teachers and CTA members not being able to speak at school board meetings. The board adopted a policy stating that no one could speak on any issue that could be a bargaining issue, which is basically any issue of concern to teachers and CTA. Mrs. Doromal stated that Patricia Walker even called Mr. Mitchell before the last school board meeting to remind him that teachers and CTA were not allowed to speak on issues that could be bargained at the school board meeting. Therefore, it makes no sense for teachers to attend until the prohibition is lifted. Mark Mitchell said CTA is trying to get this changed, but it goes deeper. Evidently there is staff that doesn't want to hear the union speak to the members. There can be no real discussion when everything is approved 8-0, no consideration of the issues. So, CTA will not

going to the School Board meetings right now. This is a practice where OCPS management is trying to stifle the Union and we are not having substantive discussion of the issues. We cannot speak to anything. We are told we shouldn't speak about policy that it should be done at bargaining, and everything is twisted to say it needs to go to bargaining. We want to talk to the board members and don't want to quash the conversation by saying it has to go to bargaining.

### **Collaborative Bargaining Training**

The District believes the training was beneficial last year. Both CTA and the District have some new members this year and it would be good to have some refresher training. It could be done as an afternoon session. CTA would like to have the Superintendent and Board members to participate as well. CTA is in favor of discussing something more concrete. No date was set at this point.

### **Tutoring on Saturdays**

- \$35 an hour as an incentive to work on Saturdays rather than the standard \$22 an hour
- Funds coming from General Fund for non-Title I schools
- Funds coming from Title I for Title I schools
- There was discussion on the rate of pay for CTE hourly teachers. Teachers on the CBLT would like to see these hourly teachers make more than the \$20-\$21 they get now. Why do tutors make \$22 and CTE hourly teachers make less? These are hourly positions not part time.
- There are two separate issues that were discussed: 1) tutoring on Saturdays and 2) CTE hourly rate
- CTA in favor of the \$35 for Saturday tutoring, wants to make sure there is a teacher selection process

### **CTA concerns:**

CTA provided a table from FLDOE that lists General Fund information on all the Districts. They stated that as the bargaining agent for all teachers, their number one priority is salary. Orange County is still so far behind the other large districts. It was stated that Orange always looks unfavorable in educating the children. Orange has more money than any other county, in the general fund. Orange has the highest unassigned fund balance of \$29.8 million, three times more than Hillsborough. Financial conditions ratio of 26.25% is the highest in the state; therefore, the district is not spending money on teachers. Up to one-third of funds are not spent, is stashed away. This is unfavorable to teachers and students. The district has more money than other Florida districts.

CTA stated that other concerns are teacher autonomy, having to teach the same curriculum the same way on the same day. Planning time is being taken for other meetings. The handout is attached to these minutes.

### **Third Grade Portfolios**

- Dr. Maria Vazquez, Chief Academic Officer, Meg Bowen, Director, Elementary Curriculum and Instruction and Dr. Brandon McKelvey, Associate Superintendent, Research, Accountability and Grants presented information on Third Grade Portfolios.
- Dr. Vazquez provided some background: We have many more parents who have chosen for their children to opt out of testing. Last year, several opted out of the portfolio as well. Then in May, 2016 when these third graders had to be retained, parents were very upset and wanted specific documentation as to why the children could not be promoted to 4<sup>th</sup> grade. Several teachers had

to spend their summer researching and providing this documentation and these teachers were being included in scathing emails and news stories.

- The Board instructed us in late July to provide another alternative to the portfolio. They did not want our teachers to be placed in this type of position again.
- The alternative was to imbed the assignments in the curriculum throughout the year.
- District administrators spoke extensively with parents and students. Parents wanted a more authentic portfolio. This way, parents can see the checklist and they know what is happening with their children throughout the year.
- The imbedded portfolio is 31 passages and 70 questions. There is a process to track progress with a recording sheet for teachers. Different versions of the tracking sheet were created based on teacher feedback. Whole class tracking sheets, which were created by teachers are also available
- Advantages:
  - Align with MTP
  - Reduced the minimum number of questions required to provide the necessary evidence
  - Setting for these assignments will be the same as for independent classwork
  - Portfolio requirements can be met by end of school year
  - Will alleviate many concerns about promotion
  - Safety net for students who may have test anxiety or are absent
  - Supports the teacher in meeting state statute which requires the teacher to create a portfolio
- Key Points of Portfolio Plans
  - 3<sup>rd</sup> grade teachers are fully informed about the plan
  - Parent letter outlining promotion requirements and required assignments has been provided
  - Required assignments are not assessments and are not appropriate as a summative measure or a teacher tool. Not enough depth to this.
  - Required assignments should not be sent home
  - Tracking sheet must transfer with student if student moves
  - Required assignments provide min. evidence needed for portfolio; some students may need additional opportunities in the spring to complete portfolio.

Presentation is attached to these minutes

#### **Insurance 101**

- Beth Curran, Senior Director, Risk Management gave a brief training on Insurance. Presentation is attached to these minutes.

#### **Opposite sex/domestic partner health benefits**

CTA believes we should have this because there is no cost to the District, it increases the number of participants, it would equalize out for people who choose not to get married

However, Beth Curran stated that there would be a greater cost in claims, and that the partners would not be eligible for flexible spending dollars, FMLA, Cobra or Spousal benefits. And there would be the imputed income. The criteria would be the same as for same sex partners, and they would have to sign an affidavit. CTA questioned how the partners would know about imputed income. Beth said we would look into having that information actually on the affidavit.

The district will have discussions and take to the School Board. We can take this matter up in the Fringe Benefits Committee.

**Paid FMLA**

CTA would like to see employees be paid the full 12 weeks for FMLA.

The CBLT

Positives and Deltas from the meeting:



- Use of traditional means of bargaining, the MOU's and Language Proposal was successful
- We liked having the name tags
- Signed 3 TAs
- Stuck to the agenda



- Need to have an alternate gatekeeper
  - Will ask for this in next meetings
- Bathrooms

Attachments to follow next page

- MOU #1,
- MOU #2, TA #1
- MOU #3, TA #2
- MOU #4, TA #3
- FL DOE Office of Funding document
- Third Grade Portfolio Presentation
- Insurance 101 Presentation

MOU #1

July 14, 2016

Payment of the \$500 "across the board" increase

The \$500 "across the board" raise will <sup>be</sup> paid starting with the August 24, 2016 paycheck. Raises based on performance shall be paid after Student Growth scores have been finalized and combined with the Instructional Practice score to create the Summative Evaluation score. This will occur after the Florida Department of Education provides state wide value added scores, and these scores have been validated by the District.

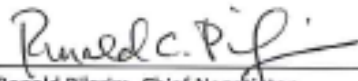
Both of these payments are raises, not bonuses and will not be paid in a lump sum. The \$500 will be prorated over the full year, and there will be some retroactive pay when the performance raise is paid.



Wendy Doromal, President  
Orange Classroom Teachers Association



Mark Erwin Mitchell, Chief Negotiator  
Executive Director, Orange UniServ



Ronald Pilgrim, Chief Negotiator  
Senior Executive Director, Human Resources  
Orange County Public Schools

MOU 2  
August 11, 2016  
Article X  
Signed by:  
Wendy Doran  
Mark Mitchell  
Ron Pilgrim

TA #1  
September 28, 2016  
Article X  
Evaluation Manual

1. Section B.3.c

- c. Teachers who have an Instructional Practice score of ~~2.0~~ 1.5 to 2.43 shall be placed in Category 2B for the subsequent school year.

Also change on page 5 and page 21 of the Evaluation manual

2. Section C.3.c

- c. A new Informal observation cannot be performed and scored until feedback has been posted for the prior Informal, unless the parties agree otherwise. ~~This does not apply to the first observation of the school year.~~

Also change on page 8 of the Evaluation manual

3. Section C.3.d.

- c. Teachers may request ~~an~~ additional informal observation(s) to be completed by another trained administrator. ~~These additional observations shall be calculated in the Instructional Practice Score and/or Deliberate Practice Score as provided elsewhere in this contract.~~

Also change on page 8 of the Evaluation manual

4. Section C.4.b.

- b. Each teacher shall be advised as to who will observe him/her prior to any Formal observation. Formal observations shall be completed by administrators only. Each Formal observation shall have a planning conference prior to and a reflection conference after the observation. Each conference shall provide privacy between the teacher and the administrator, ~~and shall occur within ten (10) duty days after the Formal observation except by mutual agreement. The planning conference shall occur within one to five duty days prior to the formal observation and the reflection conference shall occur within one to five duty days after the formal observation except by written mutual agreement.~~

Also change on page 9 of the Evaluation manual

In Glossary of Terms in Evaluation Manual: remains the same

5. Section G.2.

Student Learning Growth Rating ~~Score~~ – The ranges for the four evaluation ratings are specified as follows:

Highly Effective:	4.00
Effective:	3.29
Needs Improvement/Developing:	2.39
Unsatisfactory:	1.49

Also change on page 16 of the Evaluation manual

Luke Runer  
Patricia W. Winters  
Quaid a. Winters  
Tom Winters  
Rea T. Winters  
Lydia Winters  
Megan Carter  
Shawn Leonard  
Mark Mitchell  
Alex Heickberg

Wendy Doran  
Mark Mitchell  
Mark Mitchell  
Clinton Mitchell  
Ron Pilgrim  
Alex Heickberg  
Shawn Leonard  
Theresa Hart  
Joan Duke  
Diane



MOU #2  
September 16, 2016  
Article X, Section D, and Evaluation Manual  
Signed by:  
Wendy Daromai, Mark Mitchell  
Ron Pilgrim, Krista Russell  
Members of Evaluation Committee

TA #2  
Article X, Section D and Evaluation Manual  
September 28, 2016

#### D. Provisions for Deliberate Practice

1. The Deliberate Practice Score component shall be used to meet the multi-metric measurement as required by current state statute.
2. The Status Score plus the Deliberate Practice Score equals the Instructional Practice Score.
3. The highest Deliberate Practice rating for the targeted element from any observation will be averaged with ratings for elements 53 and 54 of Domain 3 to determine the overall Deliberate Practice score.
34. The following scoring method shall be used to determine the Deliberate Practice Score:
  - Innovating = +.4
  - Applying = +.3
  - Developing = 0
  - Beginning = -.1
  - Not Using = -.2

The scores above shall be used in the Deliberate Practice formula referenced in Section D.2. Prior to receiving the overall Deliberate Practice score, instructional personnel must complete the Deliberate Practice Plan with all pieces of evidence documented. The deadline for completing the Deliberate Practice Plan is April 15. If the plan is not completed, the result shall be a rating of Not Using for Element 54 of Domain 3, the Deliberate Practice score. Deliberate Practice observations may be conducted until the May 1 deadline.

45. The orientation for Deliberate Practice shall be provided by a teacher or administrator who has attended the training at the district level.
56. The teacher shall complete a self-evaluation in iObservation in order to choose the element of focus for their Deliberate Practice plan. The self-evaluation shall remain private.
67. The teacher shall submit a plan within the teacher's first forty-five (45) duty days.
78. The teacher and administrator shall mutually agree provide feedback to the plan within ten (10) duty days of submission. The teacher shall have ten (10) duty days to resubmit the plan if needed. Element 53 of Domain 3 shall be rated by the administrator at that time.
89. Teachers shall receive support and actionable feedback from their evaluating administrator throughout the Deliberate Practice process.
910. Administrators are encouraged to provide coverage for teachers who may choose to observe fellow teachers.
1011. The selected element shall may be scored more than once by an evaluating administrator at the end of the Deliberate Practice plan during an Informal or Formal observation, however, only the highest rating shall be counted towards the overall Deliberate Practice score, or when there is mutual agreement between the teacher and evaluator that the teacher has met the target on the element. The element may be observed at other times, but shall not be scored.
12. When teachers have received all required observations and have requested the optional additional observations, a specific observation shall be conducted for the express purpose of scoring the selected Deliberate Practice element. The evaluating administrator shall only score the selected Deliberate Practice element. No other elements will be scored during this additional observation.
13. Teachers shall be able to request one additional observation to score their selected Deliberate Practice element. No other elements are to be scored. Teachers must request this additional Deliberate Practice observation by April 1.
14. Administrators shall score Element 54 of Domain 3 by April 15.
115. Teachers on temporary contract are not required but may opt to complete the Deliberate Practice Plan.
1216. Deliberate Practice provisions may be reopened by either party each year.

#### Evaluation Manual Language:

The Deliberate Practice Score component shall be used to meet the multi-metric measurement as required by current state statute. The Status Score plus the Deliberate Practice score equals the Instructional Practice Score.

The highest Deliberate Practice rating for the targeted element from any observation is averaged with ratings for elements 53 and 54 of Domain 3 to determine the overall Deliberate Practice score.

- Element 53: Developing a written growth and development plan
- Element 54: Monitoring progress relative to the Professional Growth and Development Plan

The following scoring method shall be used to determine the Deliberate Practice Score.

Innovating = +.4	Developing = 0	Beginning = -.1
Applying = +.3		Not Using = -.2

The scores above shall be used in the Deliberate Practice formula referenced above.

The orientation for Deliberate Practice shall be provided by a teacher or administrator who has attended the training at the district level. An online Deliberate Practice tutorial can be found at

<http://pdsonline.ocps.net>. Log in using your OCP5 username and password. Deliberate Practice will be listed under Community Groups under Marzano Teacher Evaluation Resources for Educators.

Submitting the Plan: The first step is to take the tutorial and the self-assessment. The second step is to select the element, and then submit the plan within the teacher's first forty-five duty days. The teacher and administrator shall mutually agree provide feedback to the plan within ten (10) duty days of submission. The teacher shall have ten (10) duty days to resubmit the plan if needed. Element 53 of Domain 3 shall be rated by the administrator at that time.

Teachers shall receive support and actionable focused feedback from their evaluating administrator throughout the Deliberate Practice process. Administrators are encouraged to provide coverage for teachers who may choose to observe fellow teachers.

Prior to receiving the overall Deliberate Practice score, instructional personnel must complete the Deliberate Practice Plan with all pieces of evidence documented. The deadline for completing the Deliberate Practice Plan is April 15. If the plan is not completed, the result shall be a rating of Not Using for Element 54 of Domain 3, the Deliberate Practice score. Deliberate Practice observations may be conducted until the May 1 deadline.

#### Examples of Scoring:

#1: Element 53 - Applying 3.0 DP Element - Applying 3.0 Element 54 - Applying 3.0 Total 9.0 Average: 3.0 Applying DP Score: +3	#2: Element 53 - Applying 3.0 DP Element - Developing 2.0 Element 54 - Developing 2.0 Total 7.0 Average: 2.3 Developing DP Score: 0	#3: Element 53 - Applying 3.0 DP Element - Beginning 1.0 Element 54 - Not Using 0.0 Total 4.0 Average: 1.3 Beginning DP Score: -1
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#1: Element 53 - Innovating 4.0 DP Element - Applying 3.0 Element 54 - Innovating 4.0 Total 11.0 Average: 3.6 Innovating DP Score: +4
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The selected element shall may be scored more than once by an evaluating administrator at the end of the Deliberate Practice plan during an Informal or Formal observation, however, only the highest rating shall be counted towards the overall Deliberate Practice score, or when there is mutual agreement between the teacher and evaluator that the teacher has met the target on the element. The element may be observed at other times, but shall not be scored.

When teachers have received all required observations and have requested the optional additional observations, a specific observation shall be conducted for the express purpose of scoring the selected Deliberate Practice element. The evaluating administrator shall only score the selected Deliberate Practice element. No other elements will be scored during this additional observation.

Teachers shall be able to request one additional observation to score their selected Deliberate Practice element. No other elements are to be scored. Teachers must request this additional Deliberate Practice observation by April 1.

Administrators shall score Element 54 of Domain 3 by April 15.

Teachers on temporary contract are not required but may opt to complete a Deliberate Practice Plan.

Deliberate Practice provisions may be reopened by either party each year.

Krista Runnell  
 Alex Heidelberg  
 D. O. Ail  
 Ross Birkle  
 Jason Dub  
 Shouahtaromio  
 Quetzalwils  
 Allison Heby  
 Gloria E. Fuvinsky, EdD  
 Carmen  
 Pamela C. G.

6-7P  
 Clinton Meluhem  
 Michael Monow  
 Matt Em milled  
 Michael Mager  
 Aht C. N.  
 Sharon Howard  
 Megan Oates  
 Amy Jo Mills  
 Bea T. Kye  
 Tom V. Kiers

Florida Department of Education  
Office of Funding and Financial Reporting  
General Fund Restricted, Committed and Nonspendable Fund Balances;  
Assigned and Unassigned Fund Balances; and Financial Condition Ratios  
Source: 2014-15 School District Audited Financial Statements  
Prepared: April 2, 2016

District	Audited		
	General Fund Restricted, Committed and Nonspendable Fund Balances 6/30/15	General Fund Assigned and Unassigned Fund Balances 6/30/15	Financial Condition Ratios 6/30/15 <sup>1</sup>
1 Alachua	\$ 6,778,978	\$ 21,100,089	9.95%
2 Baker	243,713	4,084,319	11.47%
3 Bay	988,875	22,920,471	11.52%
4 Bradford	477,709	1,152,282	4.78%
5 Brevard <sup>1</sup>	2,870,000	45,321,000	8.94%
6 Broward <sup>1</sup>	78,989,000	62,463,000	4.23%
7 Calhoun	189,548	2,062,108	11.90%
8 Charlotte	448,596	9,784,562	8.25%
9 Citrus	3,157,147	4,326,225	3.98%
10 Clay	1,494,869	5,089,873	2.08%
11 Collier	4,340,119	81,362,936	18.25%
12 Columbia	1,211,218	3,197,031	4.51%
13 Dade <sup>1</sup>	11,521,000	113,033,000	4.28%
14 DeSoto	558,038	3,841,284	10.81%
15 Dixie	482,190	2,243,224	14.55%
16 Duval	15,380,719	100,802,576	10.94%
17 Escambia	14,259,082	37,006,970	12.75%
18 Flagler	512,087	2,814,058	3.20%
19 Franklin	247,317	1,337,158	12.03%
20 Gadsden	181,390	1,734,020	4.08%
21 Gilchrist	69,858	890,993	4.92%
22 Glades	31,928	2,894,865	20.44%
23 Gulf	118,166	1,158,850	7.45%
24 Hamilton	573,725	765,240	5.58%
25 Hardee	1,506,358	6,834,052	17.80%
26 Hendry	7,131,550	3,628,488	7.55%
27 Hernando	3,162,372	3,250,295	2.16%
28 Highlands	877,159	1,800,085	2.09%
29 Hillsborough <sup>1</sup>	27,373,000	118,650,000	7.87%
30 Holmes	105,039	813,789	3.82%
31 Indian River <sup>1</sup>	8,342,000	15,584,000	11.46%
32 Jackson	3,593,554	7,848,721	16.00%
33 Jefferson	504,375	(242,542)	0.00%
34 Lafayette	245,098	809,925	8.77%
35 Lake	1,810,342	15,228,844	5.29%
36 Lee	17,639,526	111,644,395	18.76%
37 Leon	1,828,854	31,088,630	12.37%
38 Levy	595,217	1,216,319	2.99%
39 Liberty	99,377	582,282	4.99%
40 Madison	800,835	1,243,875	6.45%
41 Manatee	3,153,182	14,194,958	4.11%
42 Marion	6,168,927	23,973,758	7.88%
43 Martin	4,760,617	6,100,279	4.23%
44 Monroe	1,197,145	11,345,647	13.47%
45 Nassau	3,034,349	6,449,897	9.15%
46 Okaloosa	8,381,362	42,934,383	19.38%
47 Oklawaha	252,748	5,839,604	12.70%
48 Orange	38,025,613	329,880,798	22.66%
49 Osceola	21,780,562	44,671,781	10.92%
50 Palm Beach <sup>1</sup>	37,121,000	80,011,000	5.54%
51 Pasco	8,499,562	47,820,110	9.58%
52 Pinellas	31,212,833	30,058,139	3.83%
53 Polk	16,890,679	49,180,934	6.77%
54 Putnam	1,450,782	4,085,257	5.32%
55 St. Johns	10,358,838	37,870,900	15.05%
56 St. Lucie	3,583,453	19,683,399	6.88%
57 Santa Rosa	4,121,278	15,313,372	8.34%
58 Sarasota	4,429,084	40,411,629	10.72%
59 Seminole	4,886,249	37,366,515	8.08%
60 Sumter	1,839,810	6,280,604	10.82%
61 Suwannee	761,161	3,304,788	7.71%
62 Taylor	314,258	3,046,869	13.33%
63 Union	182,060	670,560	3.91%
64 Volusia	1,464,200	31,167,491	7.26%
65 Wakulla	704,023	3,156,120	8.69%
66 Walton	189,868	8,234,919	11.21%
67 Washington	7,157,820	3,250,746	10.61%
Total	\$ 443,430,336	\$ 1,754,734,885	8.69%

<sup>1</sup> Amounts rounded to thousands of dollars.

<sup>2</sup> Per section 1011.051, Florida Statutes, for the fiscal year beginning July 1, 2010 and thereafter, only the general fund assigned and unassigned fund balance is used to calculate the financial condition ratio. Prior to July 1, 2010, only the general fund's unreserved fund balance was used to calculate the financial condition ratio. The change was due to the implementation of Statement No. 54 of the Governmental Accounting Standards Board (GASB), which established and expanded the fund balance designations from unreserved and reserved to nonspendable, committed, restricted, assigned and unassigned. In accordance with the GASB, special revenue funds are used to record and account for resources that are restricted or committed for a specific use. Therefore, there are no assigned, unassigned or unreserved fund balances in these special revenue funds to calculate the financial condition ratio. Also, the general fund's revenue includes Florida Education Finance Program funds allocated to charter schools.

# Orange County Public Schools



**WINNER**

the broad prize  
for urban education



Third Grade Portfolio Plan  
September 2016

## Orange County Public Schools

### Good Cause Exemptions

A1. ELL- A Limited English proficient student who has had less than 2 years of instruction in an English for Speakers of Other Languages program based on the date entered a United States school (DEUSS) and the ELL committee recommends promotion. ELL committee meeting required.
A2. ESE - A student with a disability, whose Individual Education Plan (IEP) indicates that participation in statewide assessment is not appropriate, consistent with the State Board of Education rule. The IEP Team must make a recommendation to the principal about the promotion/retention.
A3. Alternative standardized reading assessment - Score on alternative standardized assessment demonstrates that the student is reading on grade level or the equivalent of proficiency (50 <sup>th</sup> percentile or higher) on MAP, iReady, STAR Enterprise, or Iowa. The review of this evidence should lead to the conclusion that the student's reading achievement is higher than his/her FSA ELA score indicates.
A4. Portfolio - Documented evidence, selected by the teacher, demonstrates that the student is performing at least at Level 2 on the statewide, standardized English Language Arts assessment. Evidence requirements are prescribed by DOE, and include passage length and multiple choice question format.
A5. ESE Prior Retention - A student with a disability has participated in FSA ELA and has IEP or 504 Plan. Student has received intensive instruction in reading or ELA for more than two years and was previously retained in kindergarten, first, second or third grade.
A6. Prior Retention - The student has received intensive reading intervention for two or more years and has been retained for a total of two years in kindergarten, first, second, or third grade. A student may not be retained more than once in grade 3.
A7. Prior Retention - The student has received intensive remediation in reading or ELA for two or more years but still demonstrates a deficiency in reading and has been retained for a total of two years in kindergarten, first, second, or third grade. Intensive instruction must include an altered instructional day that includes specialized diagnostic information and specific reading strategies.

## Orange County Public Schools

### Approved Alternative Assessments

The following assessments may be used for a Good Cause exemption when administered after the 3<sup>rd</sup> grade FSA.

- I-Ready Diagnostic
- Measures of Academic Progress (MAP)
- STAR Enterprise
- Iowa (being phased out in OCPS), SAT10 and TerraNova (not administered in OCPS)

Retained 3<sup>rd</sup> graders who score at or above the 50<sup>th</sup> percentile on an approved alternative assessment are eligible for midyear promotion.

## Orange County Public Schools

### State Requirements for Portfolio

The student portfolio must meet the following criteria:

- Be selected by the student's teacher,
- Be an accurate picture of the student's ability and only include student work that has been independently produced in the classroom,
- Include evidence that the standards assessed by the grade three statewide English Language Arts Florida Standards Assessment have been met. Evidence is to include multiple choice items and passages that are approximately sixty (60) percent literary text and forty (40) percent information text, and that are between 100-700 words with an average of 500 words. Such evidence could include chapter or unit tests from the district's/school's adopted core reading curriculum that are aligned with the Language Arts Florida Standards or teacher-prepared assessments.
- Be an organized collection of evidence of the student's mastery of the Language Arts Florida Standards that are assessed by the grade three statewide English Language Arts Florida Standards Assessment. For each standard, there must be at least three (3) examples of mastery as demonstrated by a grade of seventy (70) percent or above on each example, and,
- Be signed by the teacher and the principal as an accurate assessment of the required reading skills.

Rulemaking Authority 1008.25(9) FS. Law Implemented 1008.25(6) FS. History—New 5-19-03, Amended 7-20-04, 3-24-08, 2-1-09, 4-21-11, 11-4-14, 6-23-16.



## Embedded Assignments for Portfolio

- Required assignments given at the conclusion of most third grade Measurement Topic Plans (MTPs)
- Assignments align with standards taught in MTP
- Assignments meet the requirements of the state rule for portfolio
- All third graders complete the 15 required assignments

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## Orange County Public Schools

During the course of the year, students will read  
31 passages and respond to 70 questions

Assignment Number	Ending Date of MTP	Passages	Questions	MTP
1	9/2/2016	1	4	Reading Literature: Key Ideas and Details - 09/22-09/22/16
2	9/23/2016	1	8	Reading Informational: Craft and Structure - 09/23-09/23/16
3	9/23/2016	1	6	Reading Informational: Key Ideas and Details - 09/23-09/23/16
4	10/13/2016	2	6	Reading Literature: Craft and Structure - 09/26-10/13/16
5	11/2/2016	2	6	Reading Informational: Craft and Structure - 10/13-11/02/16
6	11/22/2016	3	4	Reading Literature: Integration of Knowledge and Ideas - 11/03-11/22/16
7	11/22/2016	2	6	Reading Informational: Key Ideas and Details - 11/03-11/22/16
8	11/22/2016	5	10	note: 4 of the 10 items are from a close language passage
9	12/6/2016	2	4	Reading Informational: Integration of Knowledge and Ideas - 11/23-12/06/16
10	1/9/2017	2	4	Reading Literature: Key Ideas and Details: Craft and Structure - 01/04-01/09/17
11	2/3/2017	3	6	Reading Informational: Key Ideas and Details: Craft and Structure - 01/20-02/03/17
12	2/4/2017	4	3	Reading Literature: Integration of Knowledge and Ideas - 02/04-02/24/17
13	3/6/2017	2	3	Reading Informational: Integration of Knowledge and Ideas - 02/27-03/06/17
14	4/2/2017	1	4	Reading Literature: Integration of Knowledge and Ideas - 03/27-04/02/17
15	4/2/2017	2	6	Reading Informational: Key Ideas and Details - 03/27-04/02/17
16	4/2/2017	3	10	note: 4 of the 10 items are from a close language passage
17	5/31/2017	3	5	Reading Informational: Integration of Knowledge and Ideas - 05/01-05/31/17
Totals		31	70	note: There are 4 "extra" responses due to close passages for language standards, 21 fewer passages than portfolio used 2016-2017.

Only 20 unique passages (some passages are used in multiple assignments)

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## Orange County Public Schools

## Tracking Progress

- Recording sheet for teachers to track assignments will also serve as record of progress towards completion of portfolio to meet Good Cause exemption requirement
- Different versions of the tracking sheet have been created based on teacher feedback. Choose the one you are most comfortable using
- Whole class tracking sheets, created by teachers, are also available in the Google folder

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## Advantages

- Assignments align with MTP, count for a grade for all third grade students, and are distributed over the course of the entire school year
- Reduced to the minimum number of questions required to provide the necessary evidence; less than 30 minutes needed to complete most assignments
- Setting for these assignments will be the same as for independent classwork

## Advantages

- Portfolio requirements can be met by end of school year
- Will alleviate many concerns about promotion; provides a safety net for students who may have test anxiety or are absent during the testing window
- Supports the classroom teacher since the statute indicates the teacher must create the portfolio and assists the teacher in monitoring student mastery of standards so instructional adjustments can be made

## Key Points of Portfolio Plan

- Third grade teachers need to be fully informed about the plan
- Parent letter outlining promotion requirements and required assignments has been provided
- Required assignments are not assessments and are not appropriate as a summative measure or a teaching tool

## Key Points of Portfolio Plan

- Required assignments should not be sent home with students or given to parents
- Tracking sheet must transfer with student if student moves
- Required assignments provide minimum evidence needed for portfolio; some students may need additional opportunities in the spring to complete the portfolio

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## Questions and Comments

### Contacts:

Good Cause and Acceleration – Guidance

Nancy Lewis ext. 200-4089

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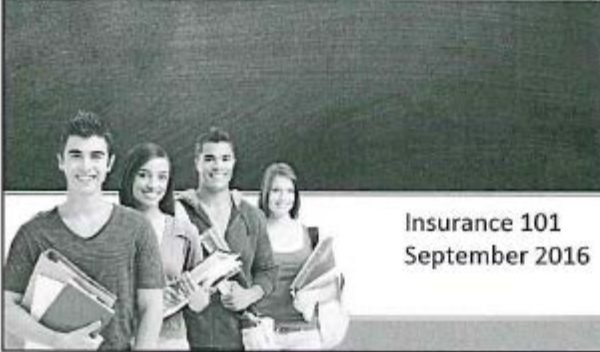
Third Grade Portfolio – Elementary ELA

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# Orange County Public Schools



Insurance 101  
September 2016

Orange County Public Schools

## Insurance 101

### Presentation Agenda

- Definitions
- Affordable Care Act (ACA)
- Carrier Considerations
- Premiums Considerations
- Funding options
- Employee Benefits Trust

## Definitions

- Deductible – pre-determined amount that must be paid before an insurance company will pay a claim
- Copayment – pre-determined/fixed amount for a specific service
- Coinsurance – Percentage of cost sharing between the member and the health plan
- Maximum Out of Pocket (MOOP)– maximum member pays – deductible, coinsurance and copayments

## Definitions

- Employee Benefits Trust (Trust) – the account where the health insurance claims and expenses are paid
- Patient Protection Affordable Care Act – health care reform, also known as PPACA, ACA, ObamaCare
- PEPM – per employee per month
- PMPM – per member per month

## Definitions

- Plan Year – 12 month period of time when the insurance coverage is in effect
- Calendar Year – 12 month period of time from January through December
- Fiscal Year – 12 month period of time for the financial reporting – July 1 – June 30

## ACA - Employer

### Employer Shared Responsibility (Pay or Play)

- "Play"
  - Coverage offered to all employees working 30+ hours per week
  - Coverage must be affordable (less than 9.5% of employee's gross pay)
  - Coverage must have an actuarial value greater than 60%
- "Pay"
  - \$2,000 penalty per employee if no coverage is offered
  - \$3,000 penalty per employee getting subsidy

### ACA - Employer

- Patient Centered Outcomes Research Institute Fee
- Transitional Reinsurance Fee
- Employee Cost of the health plan reported on the W2
- Summary of Benefits and Coverage (SBC)
- 1095 Reporting
- Cadillac plan excise tax

### ACA - Individual

- Must be enrolled in a medical plan that offers minimum essential coverage
- Financially penalized for not having qualified coverage
- 2016 fee
  - 2.5% of household income
  - \$695 per adult/\$347.50 per child
  - Maximum: \$2,085

## ACA – Plan Designs

- No cost sharing for Preventive Care
- Dependent children covered to age 26
- Pre-existing condition limitations eliminated
- No annual dollar limit
- Out of pocket maximum limits
- Medical FSA limit

## Carrier Considerations

- Fees and/or rates
- Network
- Discounts
- Bundled or unbundled
- Care and cost management programs

## Rates/Premiums Considerations

- Demographics
- Plan Design
- Utilization
- Trend
- Funding

## Funding Options

### Fully Insured

- Premiums are paid to an insurance company
- Insurance company pays the claims
- Must comply with federal and state insurance mandates
- Group pays taxes on the premium

### Self Insured

- An administrative fee is paid to the insurance company
- Insurance company processes the claims, and pays the claims with the group's funds
- OCPS must comply with state mandates
- No premium taxes

## OCPS - Funding Option

- Self-insured
- No stop loss coverage purchased
  - \$3 million for the premium (2015 – 2016)
  - \$500,000 benefit
  - Gallagher conducts a study every 4-5 years to determine if stop loss is needed
- Actuarial analysis conducted annually, by 2 separate firms, to ensure properly funded
- Annual state filing

## Employee Benefits Trust

- Trust was created to pay for health coverage
  - Medical
  - Prescription
  - Mental Health
- Can only be used for health care claims and expenses
- Board of Trustees

## Trust

