



[Ordering Guidelines-21/22 SSD](#)
Instructional Funds, Materials, and Content & Community Providers (CCPs)

Instructional Funds Information and Guidelines

- Each California state student generates funds by students average daily attendance (ADA). The funds are budgeted for use as outlined in the school's Local Accountability Plan (LCAP). Guidelines are as follows:
- Excel Academy may not provide any funds or other things of value to the pupil, or their parent or guardian, that a school district could not legally provide to a similarly situated pupil of the school district, or the parents or guardian.
- Excel Academy may only receive funding for the provision of independent study to pupils who are residents of the counties the school serves.
- The Instructional Funds (IFs) are appropriated for education purposes to deliver the student's educational plan. The funding may only be spent on appropriate educational materials for the enrolled student. They may not be used to provide educational materials/admissions for siblings or parents or anyone else not enrolled in Excel Academy, or for materials not applicable to the enrolled student's educational plan.
- IFs may be used on educational materials or services that are approved by the Teacher of Record (ToR).
- These funds can NOT be used for items designated in the Policy for Criteria of Materials or activities/product/instructors disallowed in the Conflict of Interest Policy. They also cannot be spent on any item or activity that requires payment for transportation. Excel Academy does not pay for transportation, as we receive no transportation funding. For our students, all learning occurs at home, and anything the parent/student chooses to do outside of their home needs to be within the realm of what transportation they can and want to arrange/provide.
- The amount of funds is based on the ADA calendar the state uses to appropriate school funds. The fund amount is prorated and differs depending on the student's enrollment date.
- Students who are enrolled on the first day of the school year will have the maximum amount of appropriated funds when planning their educational program. Students who enroll later in the year will have less than the maximum amount of appropriated funds with which to plan.
- For the 21/22 school year, the maximum IF appropriation for each student is \$2,700 for grades TK-8, and \$3,200 for grades 9–12, for those students who are enrolled for the entire 175 school days. The IF's are placed into the fund account in multiple disbursements throughout the school year. No school funding is provided directly to parents or students for any purpose.
- All families must have the [**Content & Community Provider \(CCP\) Agreement**](#) on file with their ToR before being allowed to request purchase orders.
- Excel Academy reserves the right to determine what services and materials will best promote the student's academic achievement. IF spending ought to be considered as being ultimately at the school's discretion.
- Special education items cannot be ordered with IFs. If a student with an IEP needs a special education item, then it must be requested through the IEP process.
- April 15, 2022 is the deadline for orders to be submitted and approved in OPS. It is vitally important to place orders earlier than the deadline. After the deadline, no purchase orders can

be submitted. IFs do not roll over from year to year. If the IFs are not used by the deadline the parent will no longer have access to them.

- Funds must be spent evenly throughout the year. All orders containing excessive quantities of anything will be reviewed by the Student Services Coordinator or administration. It is imperative that the parent and ToR ensures that students receive services and materials throughout the year.
- Student must reasonably be able to use all items by the last day of school. If the Student Services Department believes not all items can be used in time, the parent will be asked to cancel some from the order.

Management of Instructional Funds (IFs)

The parent and the ToR will work in cooperation to evaluate the most effective use of IFs to produce the best possible outcomes in terms of student learning. It is the ToR's responsibility to help each family manage their IFs account within the guidelines set forth. Please be mindful that while these funds are allotted to each student/family, the funds remain part of the Excel Academy's budget and the items purchased with these funds remain Excel Academy's property. It is the ToR's responsibility to make sure that each family does not spend in excess of their allotted IFs. Parents can obtain information on their IFs balance at any time by contacting their ToR or checking their account in OPS. Parents have the right and are encouraged to determine the allocation of these funds, however, the ultimate responsibility for ethical and professional distribution of these funds is the responsibility of the ToR and Excel Academy. It is the ToRs responsibility to ensure that all core curriculum has been purchased prior to placing purchase orders for extracurricular activities. The administration will mediate any disagreements between parents and ToRs regarding IF purchases.

Criteria for Materials That Can Be Purchased with Instructional Funds

Excel Academy receives funding from the state to support student learning and progress toward the state's standards. Therefore, IFs need to be spent on educational items that meet the criteria below. ToRs will consult with the Student Services Coordinator for additional clarification on acceptable IF purchases. The list below should not be considered as all-inclusive and Excel Academy reserves the right to the interpretation of the below criteria and to exercise final judgement on how IFs will be used.

Here are some examples of things that can be purchased with IFs:

- educational classes
- materials and curriculum
- tutoring
- Elective educational classes
- Elective educational materials/supplies
- School supplies
- Music lessons
- Physical education classes
- School scheduled and monitored field trips

General Criteria:

- Educational curriculum ordered is appropriate for the student's courses and learning plan.
- Materials must be used to meet state and school standards for the student for whom the materials are being purchased.
- All materials must be non-sectarian and non-denominational.
- As a general rule, **basic, economical items/models must be selected**. If the student requires a higher-priced, less than basic item/model, a statement from the ToR justifying the

purchase may be required and the learning associated with the item should be documented in the monthly Assignment and Work Record (AWR).

- School & office supplies adequate for learning basic course skills (paper, pencils, etc).
- Materials for a documented educational project: fabric, wool, yarn enough for one project. ToRs are responsible for monitoring the quantities of items purchased.
- Educational software to instruct and enhance learning in a subject area.
- Materials must not expose the ToR or student to danger or serious injury.
- Tracking forms & educational plans are required for certain items.
- School sponsored field trips.
- No more than 2 black printer ink cartridges and 1 color ink cartridge per semester.
- 1 Toner Cartridge per semester.
- Only 2 reams of paper allowed per semester per student.
- Organizational items if only intended to be used by the student explicitly for the organization of school supplies.

Disallowed Items:

- Furniture, storage, picture frames, and other non-educational household items .
- Excessive quantities of anything will be reviewed by the Student Services Coordinator or administration for appropriateness.
- Computer parts or equipment for non-school-owned computers.
- Costumes, uniforms, clothes, makeup or jewelry.
- Toys or items with no instructional value.
- Personal hygiene items.
- Personal PE items such as skis, bicycles, tricycles, resistance bands, large gym mats, scooter boards or items that are worn by a student (gloves, mitts) would be considered personal.
- Anything that is ordered in a size or weight for a student (bats, rackets, helmets, bikes, golf clubs, etc.)
- Some Home and Office Equipment: phones, dictation equipment, TV's.
- Power tools
- Kitchen Equipment: popcorn poppers, trays, plates, silverware, mixers, making equipment and other basic kitchen supplies
- Yard Equipment: grass watering kits, garden ponds, swimming pools
- Anything that could expose the ToR or student to injury such as knives, poisons, darts, bow and arrows, weapons, welding equipment, etc
- Sectarian materials (see below for detailed instructions)
- If a ToR inadvertently orders materials from this list, the ToR will collect the materials and return them to school administration.

Sectarian Materials

School materials cannot have sectarian/religious content. The ToR will ensure sectarian/religious materials are not ordered with school funds.

Technology Options

At Excel Academy, we value the use of technology as a powerful educational tool. Therefore, we offer our students a variety of technology options for purchase with IFs. Please be aware that, like all school materials, computers ordered with IFs are property of the school and must be returned when a student's enrollment in the school ends.

- Environmental waste fees and warranties for school owned computers must be purchased with IFs.

- All families must have the [Excel Academy iPad & Laptop Lease Agreement](#) on file with their ToR to ensure internet safety for students and that internet and computer policies and procedures are followed.
- All accessories and software purchased must be only used for devices issued by Excel Academy. Excel Academy does not assume any liability for accessories and software installed on or used with non-Excel Academy issued devices.
- *Please note that computers don't come with any additional software (e.g. Microsoft Word). If such software is needed for student work they may be available to purchase with IF's through one of our approved CCPs.
- A list of available technology options may be obtained through your ToR. All computer orders must be placed according to the options listed on the computer options document.
- One computer or laptop per student.

Service CCPs

An approved service CCP is a CCP that provides services paid for with IFs. Approved services include but are not limited to: class fees, material costs (if approved as a materials CCP), enrichment activities, community involvement activities, core subject assistance, and other educational services from our current approved CCP list. All approved CCPs must provide proof of background check clearance from the Department of Justice, proof of commercial liability insurance, and complete our pre-approval process.

The list below should not be considered as all-inclusive and Excel Academy reserves the right to the interpretation of the below criteria and to exercise final judgement on how IFs will be used.

****Please note that all service orders must be placed 10 days prior to the start of class to allow time for processing.****

Excel Academy does not pay for registration fees or membership fees.

Service CCPs Policy

- If instructional funding is to be used for approved services, all school policies and procedures must be followed.
- Prior to a student placing an order for a service CCP providing non-core elective activities with IFs, core curriculum must be in place and the ToR must confirm that the student is making adequate progress with respect to grade appropriate standards.
- The services must be approved by the ToR, the purchase order (PO) must be submitted and received by the CCPs prior to the event/activity.
- Excel Academy will not, under any circumstances, reimburse parents or ToRs for a student's participation in any services.
- No sectarian or denominational instruction may be given in any course/activity paid for by the school.
- The CCPs must be approved before the school will pay for any services.
- School funding may only be used for students currently enrolled in the school, during the school year.
- The school does not pay for season passes or recital fees.
- Excel Academy cannot pay for uniforms, belts, costumes, makeup, and/or ticket costs.
- Unless otherwise required by applicable law, instructional funding cannot be used for the following: gas or mileage, transportation fees, meals, or parking, etc.
- All non-core/electives service requests over \$500/mo must have ToR note on order stating the student is doing well academically and has core curriculum in place.
- Any orders placed after the first of the month for that month MUST be prorated to only pay for services provided 10 days after the order was placed and must include the service start date on

the description line. Per the Family CCP Agreement, Excel Academy will not pay for any services rendered prior to POs being created, including the 10 day approval time frame. For example, an order placed on 9/10/2021 must be prorated for services given on or after 9/20/2021.

Field Trips

Field Trips are group activities that are organized and overseen by the Field Trip Coordinator and school representatives. Field trips are a great, fun way for students and parents to join other students while pursuing their individual learning plans.

Field Trips are school activities for which a parent can decide if their students and family would like to attend. Students' participation in a trip is paid through their IFs, and parents and siblings will pay for out of pocket separate from the school.

Subscriptions

Excel Academy allows students to order educational subscriptions from CCPs like, Kiwi Crate, and History Unboxed. The following guidelines apply to subscriptions purchased in the 21/22 school year.

- Unlike all other materials orders, subscriptions are allowed to be delivered directly to the student's home.
- 12 month subscriptions must be ordered between August and November. Any 12 month subscriptions ordered after November 30th will be cancelled.
- After November 30th all subscription orders must be for 6 months or less. After March 30th all subscription orders must be for 3 months or fewer.

Gardening

Some CCPs provide gardening materials to students. The following restrictions apply to gardening items purchased in the 21/22 school year.

- All items must be basic in nature.
- Only enough materials for one educational project are allowed per semester.
- Educational project must be documented through learning samples and monitored by the ToR.
- Items like seeds (plants/flowers), bulbs, soil are allowed but must be basic in nature.
- Gardening tools may be ordered but cannot be sharp or dangerous to the student, and must be basic in nature.
- Additional items such as composters, sprouting trays, label sticks, and small pots may be ordered, but must be basic in nature.
- No items that students will wear, such as gloves or aprons, may be ordered.
- All equipment must be deemed fit for child educational gardening use.
- No furniture is allowed.
- No already grown plants are allowed -- seeds only.
- No potentially dangerous items such as weedkiller, insect repellent, or fertilizer.

LEGO

LEGO provides educational kits that are subject to the following guidelines in the 2021/2022- school year:

- All orders must be placed for kits from the LEGO Education website.
- All orders must have clear educational value (no minifigure kits allowed).
- Any LEGO Education orders must be documented through learning samples monitored by the ToR, and documented on the AWR.
- Kits must be grade-level appropriate.

Cancellation Policy

We cannot cancel a content order after they are processed and sent to the CCPs. Once materials are requested, the Student Services Department will order them and they cannot be cancelled. If an order has not been processed and is still in "Pre-Pending Status," the parent can cancel or edit the purchase order in OPS. For service request orders, CCPs **must** be notified, by the parent or guardian, of cancellation prior to orders being cancelled in OPS.

Disallowed Educational Activities

The following activities are examples of disallowed activities that cannot be paid for with school funds since they impose high liability and/or political risk to the school. CCPs who provide the below services will not be approved.

- Scuba Diving
- Sky Diving
- Religious, sectarian, or denominational services or materials
- Water / Jet Skiing
- Skiing / Snowboarding
- Aircraft-related activities
- Behind the wheel driver's education
- Any motorized vehicle operation
- Extreme sports that expose the student to unnecessary risk: outdoor rock climbing, white water rafting, paragliding, etc.