



California Pacific Charter Schools • Community Collaborative Schools

## Instructional Funds, Materials, and Vendors

### Instructional Funds Information and Guidelines

- Each California state student generates funds by his/her 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 his or her parent or guardian that a school district could not legally provide to a similarly situated pupil of the school district, or to his or her parents or guardian.
- Excel Academy may only receive funding for the provision of independent study to pupils who are residents of the counties the program serves
- The Instructional Funds 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.
- The Instructional Funds may be used on educational materials or services that are approved by the ES.
- 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 funding is based on the ADA calendar the state uses to appropriate school funds. The IF 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 2016-2017 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 instructional funds are placed



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into the IF account in two disbursements during the school year. No school funding is provided directly to parents or students for any purpose.

### **Management of Instructional Funds**

The parent and the ES will work in cooperation to evaluate the most effective use of funds to produce the best possible outcomes in terms of student learning. It is the Educational Specialist's responsibility to help each family manage their instructional funds 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 ES's responsibility to make sure that each family does not spend in excess of their allotted instructional funds. Parents can obtain information on their instructional funds balance at any time by contacting their ES. 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 ES's. This responsibility is not shared and the ES is responsible to ensure that all core curriculum has been purchased prior to placing purchase orders for extra curricular activities. The administration will mediate any disagreements between parents and ESs 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 standards. Therefore, instructional funds (IFs) need to be spent on educational items that meet the criteria below. ESs will consult with the Education Coordinator for additional clarification on acceptable IF purchases.

#### **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 ES justifying the purchase may be required.
- School & office supplies adequate for learning basic course skills (paper, pencils, etc).



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- Materials for a documented educational project: fabric, wool, yarn enough for one project (exception: no food purchases allowed.) ESs 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 ES or student to danger or serious injury.
- Tracking forms & educational plans are required for certain items.
- School sponsored field trips

### **Disallowed Items:**

- Furniture, storage, organizational items (large or small items), picture frames, and other non-educational household items
- Excessive quantities of anything
- 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, 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: no faxes, copiers, phones, dictation equipment, TV's
- Power tools
- Kitchen Equipment: popcorn poppers, trays, plates, silverware and other basic kitchen supplies
- Yard Equipment: grass watering kits, garden ponds, swimming pools
- Anything that could expose the ES 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 ES inadvertently orders materials from this list, the ES will collect the materials and return them to school administration.

### **Sectarian Materials**

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



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## 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 ES to ensure internet safety for students and that internet and computer policies and procedures are followed.

\*Please note that computers don't come with any additional software (e.g. Microsoft Word).

A list of available technology options may be obtained through your educational specialist.

## Services/Educational Activities (EAs)

An Educational Activity (EA) is an educational activity paid for with IFs through a service vendor. Approved EAs include but are not limited to: class fees, material costs (if approved as a materials vendor), enrichment activities, community involvement activities, core subject assistance, and other educational services fees from our current approved vendor list.

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

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

## Educational Activity (EA) Policy

If instructional funding are to be used for an EA (service class), all school policies and procedures must be followed.

Prior to a student enrolling in an EA non-core elective with instructional funds, core curriculum must be in place and the ES must confirm that the student is making adequate progress with respect to grade appropriate standards.

- The EA must be approved by the ES, the purchase order (PO) must be submitted and received by the vendor prior to the event/activity.
- Excel Academy will not, under any circumstances, reimburse parents or ESs for a student's participation in any EAs.
- No sectarian or denominational instruction may be given in any course/activity paid for by the school.
- The vendor must be approved before the school will pay for an EA.



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- School funding may only be used for students currently enrolled in the school, during the school year.
- The school does not typically pay for season passes, memberships, registration fees, and 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.

### **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 instructional funds, and parents and siblings will pay for out of pocket separate from the school.

### **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.

Scuba Diving  
Sky Diving