



Process to Access Additional Student Planning Amounts

This year we and the students and families we serve, are facing increased financial restrictions among other obstacles and stressors. It is our goal to provide the most flexibility and also the most fiscally sound and situationally appropriate academic and related supports for all of our students. With the reduction of this year's Instructional Planning Amounts (funds), the discontinuance of sibling funds transfers, and the freezing of rollover funds, we recognize that some student accounts will not suffice to meet their needs for this school year. We are primarily concerned with bridging funding gaps to ensure that every student has access to the core curriculum, classes, and technology necessary to implement their individualized educational goals and plans. In order to facilitate this, we will use a simple, responsive approach that works within our already established processes and procedures. We have already been able to implement these strategies and will continue to develop our approach as needs arise.

General scenarios:

1. Curriculum and classes ordered in the EOS. Usually these require a relatively small amount of "advance" on December funds (under \$150 for example).

Solution - HST use notes. Order goes to SA approval

When a family places an order that will put their account "in the red" the HST must add documentation to the "Notes" section of the order when approving. The more documentation and explanation, the better. The HST approves the order and it is flagged and sent to SA approval. All orders that put an account in the red are sent to SA approval for review and approval by the HST's Regional Coordinator (RC). If it is determined that the rationale is sound and necessary, RC approves the order in the EOS, and the order is processed. The account will reconcile when the December funds drop. In this scenario, additional funds are not provided, simply and advance in access to second semester planning amounts. It is the responsibility of the HST to communicate to the family this process and effect on student planning amounts reflected in the EOS.

2. High School students whose chosen curriculum exceeds the total amount allowed - Orders in COS (Curriculum ordering System - Strong Mind for example).

If a high school student's curriculum needs exceed the total amount allowed per semester or for the entire school year, for courses listed on the Master Agreement, then we may allow for additional funding. This request must be within the range of what the previous planning amount was for HS students (\$2,800). So the request might be for up to an additional \$300 for this academic year. If the order is in the EOS, HST will use "notes" as in the above scenario. If it is COS order, then the HST should order the classes and email their RC and Amy Frydenlund to request the extension of additional funds. Assistant Director, Amy Frydenlund, can send the email to ICS processors authorizing the order.



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(Executive Directors, and other administrators authorized as Principal/Executive Director Designees can also approve these requests)

3. Families with extenuating circumstances –

Students who may need access not only the December drops early, but also to the previous years' funding amount. We know that we have families who have been and may continue to be significantly impacted by recent fires, illness, or other extenuating hardship. Some victims of the Butte and recent fires, especially those who literally lost everything, for example, had additional funding amounts available in their student accounts in order to address their urgent and ongoing educational needs and resource deficits. We want to address this with extreme sensitivity while providing what is needed for students to thrive and the home teacher/learning coach to support their students well. In these circumstances the HST should reach out their RC and Amy Frydenlund to evaluate the extent of the need. The best practice here is to monitor these accounts closely, and to ensure the students are able to access all necessary curriculum and supports.

In Process:

We have another process that needs to be put in place and the goal is to have it ready by mid-September. Our plan is to survey our families to ascertain what their greatest needs and concerns are regarding funding. We will have a survey (internal only) for HST to complete on behalf of student(s) requiring access to additional planning amounts. In the meantime HSTs can contact their RC and Amy Frydenlund directly to assist with any urgent needs.

The bottom line is that the administrative team continues to maintain oversight and the ability to override our systems when warranted and if the school has available funds.