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Step One - Before you begin

The budget workbook is a Microsoft Excel file which includes macros that enable the workbook to compute totals and summary tables.

Please do NOT use the copy and paste functions within this workbook. It will create problems with the formulas embedded in the workbook.

For **Microsoft Office 2000/2003**, you may need to change the security setting in Excel. In Excel, click 'Tools', 'Macro', and then 'Security'. When the dialog box appears, change the security setting to 'Medium' and then click 'OK'. Close the Excel Application. You can now open the budget file.

For **Microsoft Office 2007** you may need to change the security setting in Excel. In Excel, click on the 'Office Button' located on the upper left of Excel. Select 'Trust Center' located on the left panel. Click on 'Trust Center Setting'. Select 'Macro Settings' and then select 'Enable all macros (not recommended, potentially dangerous code can run)'. Close the Excel Application. You must save the workbook as an earlier version of Excel (.xls **not** .xlsx).

Step Two - Select your LEA - **DO NOT SKIP THIS STEP**

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Access the Cover Sheet by clicking the link in the Table of Contents below or the appropriate tab at the bottom of this workbook. Select your LEA's name from the drop-down list. Doing so prepopulates information on other sheets in the workbook. Enter your contact information, including an alternative telephone number/email address.

Step Three - Identify schools to be served

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Access the Schools Served sheet by clicking the link in the Table of Contents below or the appropriate tab at the bottom of this workbook. For each eligible school in your LEA, select the intervention model you will implement. If you have nine or more eligible Tier I and II schools in your LEA you may not implement the transformation model in more than 50% of those schools. Then complete the school-level budget detail page. For the eligible schools that the LEA elects not to serve with School Redesign Grant (SRG) funds, explain the LEA's lack of capacity to do so on the corresponding page. Also complete the LEA-level budget detail page for any LEA-level expenditures designed to directly support implementation of these interventions at the selected schools only.

Step Four - Complete budget pages for each identified school and for LEA-level activities.

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Access each budget page through links within the Schools Served sheet. Please provide complete narrative and budget information in each sheet.

Pre-Implementation - Allowable uses of Pre-Implementation Funds

These are possible, but not exhaustive, activities that an LEA may carry out, depending on school context, using SRG funds in the spring or summer prior to full implementation. For [Level 4 Schools](#) considering funding Pre-Implementation activities using FY11 School Redesign Grant funds, please submit the Addendum: Bridge Grant Evaluation to indicate how Bridge Grants (Fund Code 323-D) are being used in the current school year, and why additional Pre-Implementation funds will be necessary.

Family and Community Engagement: Hold community meetings to review school performance, discuss the school intervention model to be implemented, and develop school improvement plans in line with the intervention model selected; survey students and parents to gauge needs of students, families, and the community; communicate with parents and the community about school status, improvement plans, choice options, and local service providers for health, nutrition, or social services through press releases, newsletters, newspaper announcements, parent outreach coordinators, hotlines, and direct mail; assist families in transitioning to new schools if their current school is implementing the closure model by providing counseling or holding meetings specifically regarding their choices; or hold open houses or orientation activities specifically for students attending a new school if their prior school is implementing the closure model.

Rigorous Review of External Providers: Conduct the required rigorous review process to select a charter school operator, a CMO, or an EMO and contract with that entity; or properly recruit, screen, and select any external providers that may be necessary to assist in planning for the implementation of an intervention model.

Staffing: Recruit and hire the incoming principal, leadership team, instructional staff, and administrative support; or evaluate the strengths and areas of need of current staff.

Instructional Programs: Provide remediation and enrichment to students in schools that will implement an intervention model at the start of the 2011-2012 school year through programs with evidence of raising achievement; identify and purchase instructional materials that are research-based, aligned with State academic standards, and have data-based evidence of raising student achievement; or compensate staff for instructional planning, such as examining student data, developing a curriculum that is aligned to State standards and aligned vertically from one grade level to another, collaborating within and across disciplines, and devising student assessments.

Professional Development and Support: Train staff on the implementation of new or revised instructional programs and policies that are aligned with the school's comprehensive instructional plan and the school's intervention model; provide instructional support for returning staff members, such as classroom coaching, structured common planning time, mentoring, consultation with outside experts, and observations of classroom practice, that is aligned with the school's comprehensive instructional plan and the school's intervention model; or train staff on the new evaluation system and locally adopted competencies.

Preparation for Accountability Measures: Develop and pilot a data system for use in SRG-funded schools; analyze data on leading baseline indicators; or develop and adopt interim assessments for use in SRG-funded schools.

Step Five - Check Combined Budget Page

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In Step Four you entered budget information on one or more worksheets on your LEA's proposed activities. This information will transfer automatically to the Combined Budget page to create a combined total LEA grant budget. While you cannot change most details on the Combined Budget in this step you should ensure that the details from your school-level budget worksheet(s) are accurately represented. If not, please make the appropriate changes in the respective budget sheet. If applicable, you can enter the indirect costs directly on the Combined Budget Page.

Make sure that the total amount requested is at least \$50,000 but no more than \$2 million per year per school (LEA-level activities should be prorated equally between schools served).

Step Six - Submit Grant Application

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Grant application must be submitted by the deadline and in accordance with instructions outlined in the RFP at:

TBD

Questions? Please contact :

SRG@doe.mass.edu

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Click the links below to access worksheets in the budget workbook.

[Cover Sheet - Including Signature Page](#)

[Schools Served](#)

[Lack of Capacity](#)

[LEA-Level Budget](#)

School-Level Budget Sheet

(Tabs with school names will appear after an intervention model is selected and the "Go to Budget Detail" link is clicked for each school on the Schools Served page.)

[Implementation Combined Budget \(Read-only except for Indirect Costs\)](#)

[Pre-Implementation Combined Budget \(Read-only except for Indirect Costs\)](#)

[Implementation - Amendment Form \(AM 1\)](#)

[Pre-Implementation - Amendment Form \(AM 1\)](#)

[Indirect Cost Calculator](#)

MASSACHUSETTS DEPARTMENT OF ELEMENTARY AND SECONDARY EDUCATION
Cover Sheet

PART I - GENERAL

A. APPLICANT	Select a LEA Name: Worcester	LEA Code: 0348
Coordinator Name:	Gregory Bares	Email: baresg@worc.k12.ma.us
Address:	20 Irving Street	
	Worcester	MA 01609
Contact Tel: 508 799 3108 ext	Alternative Tel: 508 799 3012	Submission date: 1/28/11

B. APPLICATION FOR PROGRAM FUNDING

Fund Code	Program Name	PROJECT DURATION		TOTAL AMOUNT REQUESTED:
		FROM:	TO:	This amount is linked to the grand total on the budget page and cannot be edited here.
	FY11			\$181,151
511/767	School Redesign Grant	Upon Approval	8/31/2011	
	FY12			\$1,580,701
511/767	School Redesign Grant	Upon Approval	8/31/2012	

C. I CERTIFY THAT THE INFORMATION CONTAINED IN THIS APPLICATION IS CORRECT AND COMPLETE; THAT THE APPLICANT AGENCY HAS AUTHORIZED ME, AS ITS REPRESENTATIVE, TO FILE THIS APPLICATION; AND THAT I UNDERSTAND THAT FOR ANY FUNDS RECEIVED THROUGH THIS APPLICATION THE AGENCY AGREES TO COMPLY WITH ALL APPLICATION STATE AND FEDERAL GRANT REQUIREMENTS COVERING BOTH THE PROGRAMMATIC AND FISCAL ADMINISTRATION OF GRANT FUNDS

AUTHORIZED SIGNATORY:	_____	TITLE:	Superintendent
TYPED NAME:	Melinda J. Boone, Ed.D.	DATE:	1/28/2011

REQUESTED SUBMISSION DUE: Per Completion of Each Grant
Mail or hand-deliver

- six (6) hard copies of the Redesign Plan
- one (1) hard copy of the Budget Workbook
 - one (1) hard copy of the Contact Form
- one (1) hard copy with original superintendent signature of the Assurances and Waivers page
 - one (1) hard copy of the Addendum: Bridge Grant Evaluation, if applicable
- one (1) hard copy with original superintendent signature of the Grant Cover Page contained within the Budget Workbook to:

Janet Pineault
 Center for Targeted Assistance
 MA Department of Elementary and Secondary Education
 75 Pleasant Street, Malden, MA 02148

Email an web accessible electronic copy of the Redesign Plan, Contact Form and Budget Workbook to: SRG@doe.mass.edu

Instructions: For each eligible school in your LEA, select the intervention model you will implement. If you have nine or more eligible Tier I and II schools in your LEA, you may not implement the transformation model in more than 50% of those schools. Next, complete the school-level budget detail page. For the eligible schools that the LEA elects not to serve with SRG funds, explain the LEA's lack of capacity to do so on the corresponding page. Also complete the LEA-level budget detail page for any LEA-level expenditures designed to directly support implementation of these interventions at the selected schools only.

INDIRECT COST FOR FY13 and FY14: If applicable, please enter the estimate indirect cost for FY13 and/or FY14 in the yellow shaded cell below. (see cell Q33 and R33)

Participating School	This section is pre-populated						Intervention Model Selected (select a model from the drop down list by clicking in the cell)	Go to Budget Detail Page (click link below to access budget detail or lack of capacity page)	Pre-Implementation	FY12	FY13	FY14	Total
	Level 4	School Code	NCES #	FY11 Title I status SW = School Wide TA = Targeted Assistance TAP = School Wide Planning NS = Not Served	Grades Served	FY11 Enrollment			Amount Requested (Populates when Budget Detail Page is Completed)	Amount Requested (Populates when Budget Detail Page is Completed)	Amount Requested (Populates when Budget Detail Page is Completed)	Amount Requested (Populates when Budget Detail Page is Completed)	Amount Requested
LEA-Level Activities Budget							LEA-Level Budget	Go to Budget Detail	\$ -	\$ -	\$ -	\$ -	\$ -

TIER I SCHOOLS

Chandler Elem Community	Level 4	03480050	251323002204	Title I School (SW)	PK - 06	378	Transformation	Go to Budget Detail	\$ 87,420	\$ 785,719	\$ 785,719	\$ 785,719	\$ 2,444,577
Union Hill School		03480240	251323002248	Title I School (SW)	PK - 06	344	Transformation	Go to Budget Detail	\$ 91,920	\$ 779,175	\$ 779,175	\$ 779,175	\$ 2,429,445
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TIER II SCHOOLS

Claremont Academy		03480350	251323002121	Non-Title I (NT)	07 - 12	395							\$ -
Sullivan Middle		03480423	251323002223	Non-Title I (NT)	07 - 08	794							\$ -
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	Total Amount Requested	\$ 179,340	\$ 1,564,894	\$ 1,564,894	\$ 1,564,894	\$ 4,874,022
	Enter estimated indirect cost for FY13 and FY14 (yellow-shaded cell)	\$ 1,811	\$ 15,807			\$ 17,618
	Total Amount Requested including indirect cost	\$ 181,151	\$ 1,580,701	\$ 1,564,894	\$ 1,564,894	\$ 4,891,640

Lack of Capacity to Serve all Tier I schools

Worcester

An LEA must serve all of its Tier I schools if it has the capacity to do so. However, an LEA may take into consideration, in determining its capacity, whether it also plans to serve one or more Tier II schools. In other words, an LEA with capacity to serve only a portion of its Tier I and Tier II schools may serve some of each set of schools; it does not necessarily have to expend its capacity to serve all of its Tier I schools before serving any Tier II schools.

If the LEA is not applying to serve each Tier I school, the LEA must explain why it lacks capacity to serve each Tier I school.

A LEA might demonstrate that it lacks sufficient capacity to serve one or more of its Tier I schools by documenting efforts such as its unsuccessful attempts to recruit a sufficient number of new principals to implement the turnaround or transformation model; the unavailability of CMOs or EMOs willing to restart schools in the LEA; or its intent to serve Tier II schools instead of all its Tier I schools.

A large yellow rectangular area, likely a placeholder for a response or document. It occupies the majority of the page below the introductory text.

LEA-Level Budget

District Name Worcester

This worksheet contains the FY12 Year 1 Implementation and Pre-Implementation and budget narrative and allocation form. Use the link below to access the forms and the 'Summary of Grant Request Across Four Years' form.

FY12 YEAR 1 IMPLEMENTATION (SEPTEMBER 1, 2011 - AUGUST 31, 2012)

[GRANT BUDGET NARRATIVE](#)

[ALLOCATION OF FUNDS FORM](#)

PRE - IMPLEMENTATION (MARCH 1, 2011 - AUGUST 31, 2011)

[GRANT BUDGET NARRATIVE](#)

[ALLOCATION OF FUNDS FORM](#)

[Allowable uses of Pre-Implementation Funds](#)

[SUMMARY OF GRANT REQUEST ACROSS FOUR YEARS \(FY11 to FY14\)](#)

FY12 YEAR 1 IMPLEMENTATION LEA-Level Budget Narrative Overview

Instructions: In the space below, provide an overview of how the proposed grant expenditures in FY12 will directly support the implementation of the selected intervention model according to the Implementation Timeline and Benchmarks submitted within your Redesign Plan. Please note that the below budget narrative should specifically address only the elements of the Redesign Plan that are being funded with Fund Code 511/767 grant funds. In the FY12 Grant Budget Detail section below, for each proposed FY12 grant budget expenditure, provide justification (to the right) for how individual expenditures are necessary to support the implementation of the selected intervention model as outlined in your Redesign Plan. Finally, in the Summary of Grant Request Across Four Years section at the bottom of this worksheet, please summarize proposed expenditures for FY13 and FY14. (Additional detail will be required upon renewal of the grant.)

Worcester Public Schools will take a multi-level approach to successful implementation of the Transformation Model at Chandler Elementary and Union Hill Elementary Schools. Using data, district and school-level teams have to identify key areas of needs within each school community that we anticipate, if addressed, will result in high levels of student achievement. Worcester Public Schools has restructured its central office as a support to school improvement generally, and to ensure effective monitoring and school redesign for Level IV schools specifically. Additionally, principals of Level IV schools have direct access to the superintendent and her executive leadership team to maximize efficient support as needed. The three year financial plans included with this application lay out total spending for each one of the schools.

The School Redesign Grant proposed budget includes funds to provide increased learning opportunities for students by 90 minutes per day for each day of the school year. In addition, the school has scheduled 30 minutes daily of common planning time for teachers. This time has been added to the school day for all teachers. The proposed budget includes 90 additional hours of professional development for teachers, to include work during non-school days, including during the summer. This time is in addition to the 20 hours of time required under the existing collective bargaining agreement with teachers. The District has asked that financial resources be directed to professional development because it has been shown to directly impact student achievement.

The budget also reflects additional support positions for the school. First, a Lead Teacher position has been proposed to support high quality teaching and learning at each one of the schools. A full time librarian position for each school has also been proposed. Currently, because of previous district-wide budget reductions, the district provides librarian positions at secondary schools only. The presence of a librarian at the school will help to support literacy efforts not only within the schools, but the neighborhood as well. When children have ready access to library materials, they are more likely to read and engage their families in literacy activities.

Also, the budget proposes to increase the level of student support positions (School Adjustment Counselor) by 0.5 FTE position. This position will provide the social-emotional and behavioral supports needs for the student population. In addition, the budget would increase the level of health education support by adding 0.5 FTE of additional teacher support. The inclusion of these two positions speaks to the social-emotional needs of the child. Unmet needs present an insurmountable obstacle to a child with regard to academic achievement.

The budget also reflects additional funding for instructional supplies and materials, such as leveled readers and additional library materials.

The district is prepared to allocate the necessary resources to sustain funding of this plan after the Redesign Plan period, although the district would look to reduce this initial funding based on a gradual release of capacity building strategies, such as spending on staff development and instructional coaching as the level of individual teacher capacity increases. The district would be prepared to continue the appropriate level of expanded learning opportunities and/or supplemental services that may be needed at the end of the Plan period. In addition, the district is seeking permanent collective bargaining changes that would allow for an expansion of the teacher work day across the system for elementary teachers that would be used for common planning time.

The district is prepared and has the capacity to provide direct instructional, financial, and human resources support during the Redesign Plan using existing resources available to the district. This includes a district level administrator position that has been assigned to provide direct

LEA-Level Budget

District Name Worcester

5 CONTRACTUAL SERVICES	Rate (\$)	Hour/Day	Amount	Expenditure Justification
Consultants				

Specialists				

Instructors				

Speakers				

Substitutes				

Supplemental Educational Services (SES) - Contracted Service Provider				

Neglected or Delinquent Children - Contracted Service Provider (if applicable)				

Other				

SUB-TOTAL \$ -

6 SUPPLIES AND MATERIALS	Amount	Expenditure Justification
Textbooks and Instructional Materials		

Instructional Technology including Software		

Non-instructional Supplies		

SUB-TOTAL \$ -

7 TRAVEL: Mileage, conference registration, hotel and meals	Amount	Expenditure Justification
Supervisory Staff		

Instructional Staff		

Other		

SUB-TOTAL \$ -

8 OTHER COSTS:	Amount	Expenditure Justification
Transportation of Students		
Memberships/Subscriptions		
Advertising		
Printing/Reproduction		
Maintenance/Repairs		
Rental of Space		
Rental of Equipment		
Telephone/Utilities		

SUB-TOTAL \$ -

9 INDIRECT COSTS - Must be entered directly on Combined Budget Worksheet	Amount	Expenditure Justification
10 EQUIPMENT: Only list items costing \$5,000 or more per unit and having a useful life of more than one year. Describe below.		
Instructional Equipment _____		
Non-instructional Equipment _____		

SUB-TOTAL \$ -

TOTAL FUNDS REQUESTED \$ -

PRE-IMPLEMENTATION - LEA-Level Budget Narrative Overview

Instructions: In the space below, provide an overview of how the proposed grant expenditures in FY11 will directly support the pre-implementation of the selected intervention model according to the Implementation Timeline and Benchmarks submitted as part of the school-level Redesign Plan. For Level 4 Schools considering funding Pre-Implementation activities using FY11 School Redesign Grant funds, please submit the Addendum: Bridge Grant Evaluation to indicate how Bridge Grants (Fund Code 323-D) are being used in the current school year, and why additional Pre-Implementation funds will be necessary.

Please note that this narrative overview should specifically address only the elements of the Redesign Plan that are being funded with Fund Code 511/767 grant funds. In the Pre-Implementation Grant Budget Detail section below, for each proposed Pre-Implementation grant budget expenditure, provide justification (to the right) for how individual expenditures are necessary to support the pre-implementation or the implementation of the selected intervention model as outlined in the Redesign Plan. Finally, in the Summary of Grant Request Across Four Years section at the bottom of this worksheet, please summarize proposed expenditures for FY13 and FY14. (Additional detail will be required upon renewal of the grant.)

The Worcester Public Schools seeks pre-implementation funding in order to support its school redesign efforts. Pre-implementation funds will allow the district to provide 10 days of summer professional development to all teachers and instructional assistants at each Level IV school. In preparation for the 2011-2012 school year, we propose a rigorous professional development program in the areas of literacy, leadership and social-emotional supports. In order to build professional capacity, we will conduct intensive training focused on the need for teachers to differentiate instruction to engage and challenge all students. Professional development activities will highlight the importance of adapting activities to address the specific strengths and learning styles of each student. Leadership development will foster a school culture where faculty, students, family and community members collaborate to solve problems and accelerate results. Training will also emphasize social, emotional, and academic growth in a strong and safe school community.

PRE-IMPLEMENTATION GRANT BUDGET DETAIL

Worcester

ALLOCATION OF FUNDS

1 ADMINISTRATORS:	# of staff	FTE	MTRS	Amount	Expenditure Justification
Supervisor/Director			<input type="checkbox"/>		
Project Coordinator			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
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			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
Stipends			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
SUB-TOTAL	0	0.00		\$ -	

2 INSTRUCTIONAL/PROFESSIONAL STAFF:	# of staff	FTE	MTRS	Amount	Expenditure Justification
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
Stipends			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
SUB-TOTAL	0	0.00		\$ -	

3 SUPPORT STAFF	# of staff	FTE	MTRS	Amount	Expenditure Justification
Aides/Paraprofessionals			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
Secretary/Bookkeeper			<input type="checkbox"/>		
Other			<input type="checkbox"/>		
			<input type="checkbox"/>		
Stipends			<input type="checkbox"/>		
SUB-TOTAL	0	0.00		\$ -	

4 FRINGE BENEFITS:		Amount	Expenditure Justification
4-a MTRS	Automatically calculates if MTRS box is checked for any staff listed above.	\$0	
4-b OTHER FRINGE BENEFITS	(Other retirement systems, health insurance, FICA - Describe below)		
SUB-TOTAL		\$0	

LEA-Level Budget

District Name Worcester

5 CONTRACTUAL SERVICES	Rate (\$)	Hour/Day	Amount	Expenditure Justification
Consultants				

Specialists				

Instructors				

Speakers				

Substitutes				

Supplemental Educational Services (SES) - Contracted Service Provider				

Neglected or Delinquent Children - Contracted Service Provider (if applicable)				

Other				

SUB-TOTAL \$ -

6 SUPPLIES AND MATERIALS	Amount	Expenditure Justification
Textbooks and Instructional Materials		

Instructional Technology including Software		

Non-instructional Supplies		

SUB-TOTAL \$ -

7 TRAVEL: Mileage, conference registration, hotel and meals	Amount	Expenditure Justification
Supervisory Staff		

Instructional Staff		

Other		

SUB-TOTAL \$ -

8 OTHER COSTS:	Amount	Expenditure Justification
Transportation of Students		
Memberships/Subscriptions		
Advertising		
Printing/Reproduction		
Maintenance/Repairs		
Rental of Space		
Rental of Equipment		
Telephone/Utilities		

SUB-TOTAL \$ -

9 INDIRECT COSTS - <i>Must be entered directly on Combined Budget Worksheet</i>	Amount	Expenditure Justification
10 EQUIPMENT: Only list items costing \$5,000 or more per unit and having a useful life of more than one year. Describe below.		
Instructional Equipment _____		
Non-instructional Equipment _____		

SUB-TOTAL \$ -

TOTAL FUNDS REQUESTED \$ -

LEA-Level Budget

District Name Worcester

SUMMARY OF GRANT REQUEST ACROSS FOUR YEARS

		Amount					Narrative Summary for FY13 and FY14 Grant Budget Request
		Pre-Imp	FY12	FY13	FY14	Total	
1	ADMINISTRATORS	\$0	\$0			\$0	
2	INSTRUCTIONAL/ PROFESSIONAL STAFF	\$0	\$0			\$0	
3	SUPPORT STAFF	\$0	\$0			\$0	
4	FRINGE BENEFITS	\$0	\$0			\$0	
5	CONTRACTUAL SERVICES	\$0	\$0			\$0	
6	SUPPLIES AND MATERIALS	\$0	\$0			\$0	
7	TRAVEL	\$0	\$0			\$0	
8	OTHER COSTS	\$0	\$0			\$0	
10	EQUIPMENT	\$0	\$0			\$0	
TOTAL FUNDS REQUESTED FOR LEA		\$0	\$0	\$0	\$0	\$0	

School-Level Budget

School Name Chandler Elem Community

Federal intervention model: Transformation

This worksheet contains the FY12 Year 1 Implementation and Pre-Implementation and budget narrative and allocation form. Use the link below to access the forms and the 'Summary of Grant Request Across Four Years' form.

FY12 YEAR 1 IMPLEMENTATION (SEPTEMBER 1, 2011 - AUGUST 31, 2012)

[GRANT BUDGET NARRATIVE](#)
[ALLOCATION OF FUNDS FORM](#)

PRE - IMPLEMENTATION (MARCH 1, 2011 - AUGUST 31, 2011)

[GRANT BUDGET NARRATIVE](#)
[ALLOCATION OF FUNDS FORM](#)

[Allowable uses of Pre-Implementation Funds](#)

[SUMMARY OF GRANT REQUEST ACROSS FOUR YEARS \(FY11 to FY14\)](#)

FY12 YEAR 1 IMPLEMENTATION School-Level Budget Narrative Overview

Instructions: In the space below, provide an overview of how the proposed grant expenditures in FY12 will directly support the implementation of the selected intervention model according to the Implementation Timeline and Benchmarks submitted within your Redesign Plan. Please note that the below budget narrative should specifically address only the elements of the Redesign Plan that are being funded with Fund Code 511/767 grant funds. In the FY12 Grant Budget Detail section below, for each proposed FY12 grant budget expenditure, provide justification (to the right) for how individual expenditures are necessary to support the implementation of the selected intervention model as outlined in your Redesign Plan. Finally, in the Summary of Grant Request Across Four Years section at the bottom of this worksheet, please summarize proposed expenditures for FY13 and FY14. (Additional detail will be required upon renewal of the grant.)

Worcester Public Schools will take a multi-level approach to successful implementation of the Transformation Model at Chandler Elementary and Union Hill Elementary Schools. Using data, district and school-level teams have to identify key areas of needs within each school community that we anticipate, if addressed, will result in high levels of student achievement. Worcester Public Schools has restructured its central office as a support to school improvement generally, and to ensure effective monitoring and school redesign for Level IV schools specifically. Additionally, principals of Level IV schools have direct access to the superintendent and her executive leadership team to maximize efficient support as needed. The three year financial plans included with this application lay out total spending for each one of the schools.

The School Redesign Grant proposed budget includes funds to provide increased learning opportunities for students by 90 minutes per day for each day of the school year. In addition, the school has scheduled 30 minutes daily of common planning time for teachers. This time has been added to the school day for all teachers. The proposed budget includes 90 additional hours of professional development for teachers, to include work during non-school days, including during the summer. This time is in addition to the 20 hours of time required under the existing collective bargaining agreement with teachers. The District has asked that financial resources be directed to professional development because it has been shown to directly impact student achievement.

The budget also reflects additional support positions for the school. First, a Lead Teacher position has been proposed to support high quality teaching and learning at each one of the schools. A full time librarian position for each school has also been proposed. Currently, because of previous district-wide budget reductions, the district provides librarian positions at secondary schools only. The presence of a librarian at the school will help to support literacy efforts not only within the schools, but the neighborhood as well. When children have ready access to library materials, they are more likely to read and engage their families in literacy activities.

Also, the budget proposes to increase the level of student support positions (School Adjustment Counselor) by 0.5 FTE position. This position will provide the social-emotional and behavioral supports needs for the student population. In addition, the budget would increase the level of health education support by adding 0.5 FTE of additional teacher support. The inclusion of these two positions speaks to the social-emotional needs of the child. Unmet needs present an insurmountable obstacle to a child with regard to academic achievement.

The budget also reflects additional funding for instructional supplies and materials, such as leveled readers and additional library materials. The district is prepared to allocate the necessary resources to sustain funding of this plan after the Redesign Plan period, although the district would look to reduce this initial funding based on a gradual release of capacity building strategies, such as spending on staff development and instructional coaching as the level of individual teacher capacity increases. The district would be prepared to continue the appropriate level of expanded learning opportunities and/or supplemental services that may be needed at the end of the Plan period. In addition, the district is seeking permanent collective bargaining changes that would allow for an expansion of the teacher work day across the system for elementary teachers that would be used for common planning time.

The district is prepared and has the capacity to provide direct instructional, financial, and human resources support during the Redesign Plan using existing resources available to the district. This includes a district level administrator position that has been assigned to provide direct

School-Level Budget

School Name	Chandler Elem Community
Federal intervention model:	Transformation

5 CONTRACTUAL SERVICES	Rate (\$)	Hour/Day	Amount	Expenditure Justification
Consultants	50-100	hr	\$ 77,000	Contractual service providers will provide professional development to teachers throughout the school year. These specialists will provide specific professional development based on deficits identified by the school redesign team.

Specialists				

Instructors				

Speakers				

Substitutes				

Supplemental Educational Services (SES) - Contracted Service Provider				
Neglected or Delinquent Children - Contracted Service Provider (if applicable)				
Other				

SUB-TOTAL			\$ 77,000	
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6 SUPPLIES AND MATERIALS	Amount	Expenditure Justification
Textbooks and Instructional Materials	\$ 42,000	Instructional materials: Funding would be used to purchase "leveled readers" for each of the schools. This material would be used by teachers in helping to engage students. They are designed to build fluency and independence for students. A collection of original fiction and nonfiction texts will allow students to apply skills and strategies at their own instructional levels.

Instructional Technology including Software		

Non-instructional Supplies		

	\$ 36,000	Library materials – Funding would be used to purchase library materials that would be placed into each of the schools libraries. These materials

SUB-TOTAL		\$ 78,000
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7 TRAVEL: Mileage, conference registration, hotel and meals	Amount	Expenditure Justification
Supervisory Staff		

Instructional Staff		

Other		

SUB-TOTAL		\$ -
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8 OTHER COSTS:	Amount	Expenditure Justification
Transportation of Students		
Memberships/Subscriptions		
Advertising		
Printing/Reproduction		
Maintenance/Repairs		
Rental of Space		
Rental of Equipment		
Telephone/Utilities		

SUB-TOTAL		\$ -
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9 INDIRECT COSTS - <i>Must be entered directly on Combined Budget Worksheet</i>	Amount	Expenditure Justification
10 EQUIPMENT: Only list items costing \$5,000 or more per unit and having a useful life of more than one year. Describe below.		
Instructional Equipment		
Non-instructional Equipment		

SUB-TOTAL		\$ -
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School-Level Budget

School Name	Chandler Elem Community
Federal intervention model:	Transformation
TOTAL FUNDS REQUESTED	\$ 785,719

School-Level Budget

School Name Chandler Elem Community

Federal intervention model: Transformation

PRE-IMPLEMENTATION - School-Level Budget Narrative Overview

Instructions: In the space below, provide an overview of how the proposed grant expenditures in FY11 will directly support the pre-implementation of the selected intervention model according to the Implementation Timeline and Benchmarks submitted as part of the school-level Redesign Plan. For Level 4 Schools considering funding Pre-Implementation activities using FY11 School Redesign Grant funds, please submit the Addendum: Bridge Grant Evaluation to indicate how Bridge Grants (Fund Code 323-D) are being used in the current school year, and why additional Pre-Implementation funds will be necessary.

Please note that this narrative overview should specifically address only the elements of the Redesign Plan that are being funded with Fund Code 511/767 grant funds. In the Pre-Implementation Grant Budget Detail section below, for each proposed Pre-Implementation grant budget expenditure, provide justification (to the right) for how individual expenditures are necessary to support the pre-implementation or the implementation of the selected intervention model as outlined in the Redesign Plan. Finally, in the Summary of Grant Request Across Four Years section at the bottom of this worksheet, please summarize proposed expenditures for FY13 and FY14. (Additional detail will be required upon renewal of the grant.)

The Worcester Public Schools seeks pre-implementation funding in order to support its school redesign efforts. Pre-implementation funds will allow the district to provide 10 days of summer professional development to all teachers and instructional assistants at each Level IV school. In preparation for the 2011-2012 school year, we propose a rigorous professional development program in the areas of literacy, leadership and social-emotional supports. In order to build professional capacity, we will conduct intensive training focused on the need for teachers to differentiate instruction to engage and challenge all students. Professional development activities will highlight the importance of adapting activities to address the specific strengths and learning styles of each student. Leadership development will foster a school culture where faculty, students, family and community members collaborate to solve problems and accelerate results. Training will also emphasize social, emotional, and academic growth in a strong and safe school community.

School-Level Budget

School Name	Chandler Elem Community
Federal intervention model:	Transformation

5 CONTRACTUAL SERVICES	Rate (\$)	Hour/Day	Amount	Expenditure Justification
Consultants _____ _____	50-100	hr	\$ 30,000	Consultants will provide professional development during the month of August to teachers and instructional aides. Professional development will include guided reading and leadership to elementary teachers that emphasizes social, emotional, and academic growth in a strong and safe school community.

Specialists _____ _____				

Instructors _____ _____				

Speakers _____				

Substitutes _____				

Supplemental Educational Services (SES) - Contracted Service Provider _____				
Neglected or Delinquent Children - Contracted Service Provider (if applicable) _____				
Other _____				

SUB-TOTAL	\$ 30,000
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6 SUPPLIES AND MATERIALS	Amount	Expenditure Justification
Textbooks and Instructional Materials _____ _____		

Instructional Technology including Software _____ _____		

Non-instructional Supplies _____ _____		

SUB-TOTAL	\$ -
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7 TRAVEL: Mileage, conference registration, hotel and meals	Amount	Expenditure Justification
Supervisory Staff _____		

Instructional Staff _____		

Other _____		

SUB-TOTAL	\$ -
------------------	-------------

8 OTHER COSTS:	Amount	Expenditure Justification
Transportation of Students		
Memberships/Subscriptions		
Advertising		
Printing/Reproduction		
Maintenance/Repairs		
Rental of Space		
Rental of Equipment		
Telephone/Utilities		

SUB-TOTAL	\$ -
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9 INDIRECT COSTS - <i>Must be entered directly on Combined Budget Worksheet</i>	Click here Combined Budget Worksheet	Expenditure Justification
10 EQUIPMENT: Only list items costing \$5,000 or more per unit and having a useful life of more than one year. Describe below.		
Instructional Equipment _____	Amount	
Non-instructional Equipment _____		

SUB-TOTAL	\$ -
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School-Level Budget

School Name	Chandler Elem Community
Federal intervention model:	Transformation
TOTAL FUNDS REQUESTED	\$ 87,420

School-Level Budget

School Name	Chandler Elem Community
Federal intervention model:	Transformation

SUMMARY OF GRANT REQUEST ACROSS FOUR YEARS

Manually enter estimated amounts for FY13 and FY14, if applicable.

		Amount					Narrative Summary for FY13 and FY14 Grant Budget Request
		Pre-Imp	FY12	FY13	FY14	Total	
1	ADMINISTRATORS	\$0	\$0			\$0	
2	INSTRUCTIONAL/ PROFESSIONAL STAFF	\$48,600	\$584,715	\$584,715	\$584,715	\$1,802,745	Staff \$219,000 - New Lead Teacher (1.0), New Librarian (1.0), New Additional Health Teacher (0.5), Additional School Adjustment Counselor (0.5) Stipends \$365,715: Increased Learning Opportunity 27 Teachers x 1.5 hrs x 180 days @ \$30/hr = \$218,700 Additional 90 hours of Staff Development 27 Teachers x 90 hrs @ \$30/hr = \$72,900 Common Planning Time 27 Teachers x 5 hrs x 183 days @ \$30/hr =
3	SUPPORT STAFF	\$8,820	\$0			\$8,820	
4	FRINGE BENEFITS	\$0	\$46,004	\$46,004	\$46,004	\$138,012	MTRS and Other Fringe Benefits
5	CONTRACTUAL SERVICES	\$30,000	\$77,000	\$77,000	\$77,000	\$261,000	Contractual service providers will provide professional development to teachers throughout the school year. These specialists will provide specific professional development based on deficits identified by the school redesign team.
6	SUPPLIES AND MATERIALS	\$0	\$78,000	\$78,000	\$78,000	\$234,000	Instructional materials: Funding would be used to purchase "leveled readers" for each of the schools. This material would be used by teachers in helping to engage students. They are designed to build fluency and independence for students. A collection of original fiction and nonfiction texts will allow students to apply skills and strategies at their own instructional levels. Library materials – Funding would be used to purchase library materials that would be placed into each of the school's libraries. These materials would be readily available to students who often don't have such resources within their
7	TRAVEL	\$0	\$0			\$0	
8	OTHER COSTS	\$0	\$0			\$0	
10	EQUIPMENT	\$0	\$0			\$0	
TOTAL FUNDS REQUESTED FOR LEA		\$87,420	\$785,719	\$785,719	\$785,719	\$2,444,577	

School-Level Budget

School Name	Union Hill School
Federal intervention model:	Transformation

This worksheet contains the FY12 Year 1 Implementation and Pre-Implementation and budget narrative and allocation form. Use the link below to access the forms and the 'Summary of Grant Request Across Four Years' form.

FY12 YEAR 1 IMPLEMENTATION (SEPTEMBER 1, 2011 - AUGUST 31, 2012)

[GRANT BUDGET NARRATIVE](#)
[ALLOCATION OF FUNDS FORM](#)

PRE - IMPLEMENTATION (MARCH 1, 2011 - AUGUST 31, 2011)

[GRANT BUDGET NARRATIVE](#)
[ALLOCATION OF FUNDS FORM](#)

[Allowable uses of Pre-Implementation Funds](#)

[SUMMARY OF GRANT REQUEST ACROSS FOUR YEARS \(FY11 to FY14\)](#)

FY12 YEAR 1 IMPLEMENTATION School-Level Budget Narrative Overview

Instructions: In the space below, provide an overview of how the proposed grant expenditures in FY12 will directly support the implementation of the selected intervention model according to the Implementation Timeline and Benchmarks submitted within your Redesign Plan. Please note that the below budget narrative should specifically address only the elements of the Redesign Plan that are being funded with Fund Code 511/767 grant funds. In the FY12 Grant Budget Detail section below, for each proposed FY12 grant budget expenditure, provide justification (to the right) for how individual expenditures are necessary to support the implementation of the selected intervention model as outlined in your Redesign Plan. Finally, in the Summary of Grant Request Across Four Years section at the bottom of this worksheet, please summarize proposed expenditures for FY13 and FY14. (Additional detail will be required upon renewal of the grant.)

Worcester Public Schools will take a multi-level approach to successful implementation of the Transformation Model at Chandler Elementary and Union Hill Elementary Schools. Using data, district and school-level teams have to identify key areas of needs within each school community that we anticipate, if addressed, will result in high levels of student achievement. Worcester Public Schools has restructured its central office as a support to school improvement generally, and to ensure effective monitoring and school redesign for Level IV schools specifically. Additionally, principals of Level IV schools have direct access to the superintendent and her executive leadership team to maximize efficient support as needed. The three year financial plans included with this application lay out total spending for each one of the schools.

The School Redesign Grant proposed budget includes funds to provide increased learning opportunities for students by 90 minutes per day for each day of the school year. In addition, the school has scheduled 30 minutes daily of common planning time for teachers. This time has been added to the school day for all teachers. The proposed budget includes 90 additional hours of professional development for teachers, to include work during non-school days, including during the summer. This time is in addition to the 20 hours of time required under the existing collective bargaining agreement with teachers. The District has asked that financial resources be directed to professional development because it has been shown to directly impact student achievement.

The budget also reflects additional support positions for the school. First, a Lead Teacher position has been proposed to support high quality teaching and learning at each one of the schools. A full time librarian position for each school has also been proposed. Currently, because of previous district-wide budget reductions, the district provides librarian positions at secondary schools only. The presence of a librarian at the school will help to support literacy efforts not only within the schools, but the neighborhood as well. When children have ready access to library materials, they are more likely to read and engage their families in literacy activities.

Also, the budget proposes to increase the level of student support positions (School Adjustment Counselor) by 0.5 FTE position. This position will provide the social-emotional and behavioral supports needs for the student population. In addition, the budget would increase the level of health education support by adding 0.5 FTE of additional teacher support. The inclusion of these two positions speaks to the social-emotional needs of the child. Unmet needs present an insurmountable obstacle to a child with regard to academic achievement.

The budget also reflects additional funding for instructional supplies and materials, such as leveled readers and additional library materials. The district is prepared to allocate the necessary resources to sustain funding of this plan after the Redesign Plan period, although the district would look to reduce this initial funding based on a gradual release of capacity building strategies, such as spending on staff development and instructional coaching as the level of individual teacher capacity increases. The district would be prepared to continue the appropriate level of expanded learning opportunities and/or supplemental services that may be needed at the end of the Plan period. In addition, the district is seeking permanent collective bargaining changes that would allow for an expansion of the teacher work day across the system for elementary teachers that would be used for common planning time.

The district is prepared and has the capacity to provide direct instructional, financial, and human resources support during the Redesign Plan using existing resources available to the district. This includes a district level administrator position that has been assigned to provide direct

School-Level Budget

School Name	Union Hill School
Federal intervention model:	Transformation

support to the school. Again, as indicated in the plan, the school level budget for districts will be adjusted accordingly during the plan period.

2012 YEAR 1 IMPLEMENTATION GRANT BUDGET DETAIL

Union Hill School

ALLOCATION OF FUNDS

1 ADMINISTRATORS:	# of staff	FTE	MTRS	Amount	Expenditure Justification
Supervisor/Director			<input type="checkbox"/>		
Project Coordinator			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
Stipends			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
SUB-TOTAL	0	0.00		\$ -	

2 INSTRUCTIONAL/PROFESSIONAL STAFF:	# of staff	FTE	MTRS	Amount	Expenditure Justification
	4	3.00	<input checked="" type="checkbox"/>	\$ 76,000	Staff \$219,000 - New Lead Teacher (1.0), New Librarian (1.0), New Additional Health Teacher (0.5), Additional School Adjustment Counselor (0.5) Stipends \$352,170: Increased Learning Opportunity 26 Teachers x 1.5 hrs x 180 days @ \$30/hr = \$210,600 Additional 90 hours of Staff Development 26 Teachers x 90 hrs @ \$30/hr = \$70,200 Common Planning Time 26 Teachers x .5 hrs x 183 days @ \$30/hr = \$71,370
			<input checked="" type="checkbox"/>	\$ 71,000	
			<input checked="" type="checkbox"/>	\$ 36,000	
			<input type="checkbox"/>	\$ 36,000	
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>	\$ 352,170	
			<input type="checkbox"/>		
			<input type="checkbox"/>		
Stipends			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
SUB-TOTAL	4	3.00		\$ 571,170	

3 SUPPORT STAFF	# of staff	FTE	MTRS	Amount	Expenditure Justification
Aides/Paraprofessionals			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
Secretary/Bookkeeper			<input type="checkbox"/>		
Other			<input type="checkbox"/>		
			<input type="checkbox"/>		
Stipends			<input type="checkbox"/>		
SUB-TOTAL	0	0.00		\$ -	

4 FRINGE BENEFITS:	Amount	Expenditure Justification
4-a MTRS Automatically calculates if MTRS box is checked for any staff listed above.	\$16,470	
4-b OTHER FRINGE BENEFITS (Other retirement systems, health insurance, FICA - Describe below)	\$ 29,535	

SUB-TOTAL	\$46,005
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School-Level Budget

School Name	Union Hill School
Federal intervention model:	Transformation

5 CONTRACTUAL SERVICES	Rate (\$)	Hour/Day	Amount	Expenditure Justification
Consultants	50-100	hr	\$ 82,000	Contractual service providers will provide professional development to teachers throughout the school year. These specialists will provide specific professional development based on deficits identified by the school redesign team.

Specialists				

Instructors				

Speakers				

Substitutes				

Supplemental Educational Services (SES) - Contracted Service Provider				
Neglected or Delinquent Children - Contracted Service Provider (if applicable)				
Other				

SUB-TOTAL			\$ 82,000	
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6 SUPPLIES AND MATERIALS	Amount	Expenditure Justification
Textbooks and Instructional Materials	\$ 42,000	Instructional materials: Funding would be used to purchase "leveled readers" for each of the schools. This material would be used by teachers in helping to engage students. They are designed to build fluency and independence for students. A collection of original fiction and nonfiction texts will allow students to apply skills and strategies at their own instructional levels.

Instructional Technology including Software		

Non-instructional Supplies		

	\$ 38,000	Library materials – Funding would be used to purchase library materials that would be placed into each of the school's libraries. These materials

SUB-TOTAL		\$ 80,000
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7 TRAVEL: Mileage, conference registration, hotel and meals	Amount	Expenditure Justification
Supervisory Staff		

Instructional Staff		

Other		

SUB-TOTAL		\$ -
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8 OTHER COSTS:	Amount	Expenditure Justification
Transportation of Students		
Memberships/Subscriptions		
Advertising		
Printing/Reproduction		
Maintenance/Repairs		
Rental of Space		
Rental of Equipment		
Telephone/Utilities		

SUB-TOTAL		\$ -
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9 INDIRECT COSTS - <i>Must be entered directly on Combined Budget Worksheet</i>	Amount	Expenditure Justification
10 EQUIPMENT: Only list items costing \$5,000 or more per unit and having a useful life of more than one year. Describe below.		
Instructional Equipment		
Non-instructional Equipment		

SUB-TOTAL		\$ -
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School-Level Budget

School Name	Union Hill School
Federal intervention model:	Transformation
TOTAL FUNDS REQUESTED	\$ 779,175

School-Level Budget

School Name	Union Hill School
Federal intervention model:	Transformation

PRE-IMPLEMENTATION - School-Level Budget Narrative Overview

Instructions: In the space below, provide an overview of how the proposed grant expenditures in FY11 will directly support the pre-implementation of the selected intervention model according to the Implementation Timeline and Benchmarks submitted as part of the school-level Redesign Plan. For Level 4 Schools considering funding Pre-Implementation activities using FY11 School Redesign Grant funds, please submit the Addendum: Bridge Grant Evaluation to indicate how Bridge Grants (Fund Code 323-D) are being used in the current school year, and why additional Pre-Implementation funds will be necessary.

Please note that this narrative overview should specifically address only the elements of the Redesign Plan that are being funded with Fund Code 511/767 grant funds. In the Pre-Implementation Grant Budget Detail section below, for each proposed Pre-Implementation grant budget expenditure, provide justification (to the right) for how individual expenditures are necessary to support the pre-implementation or the implementation of the selected intervention model as outlined in the Redesign Plan. Finally, in the Summary of Grant Request Across Four Years section at the bottom of this worksheet, please summarize proposed expenditures for FY13 and FY14. (Additional detail will be required upon renewal of the grant.)

The Worcester Public Schools seeks pre-implementation funding in order to support its school redesign efforts. Pre-implementation funds will allow the district to provide 10 days of summer professional development to all teachers and instructional assistants at each Level IV school. In preparation for the 2011-2012 school year, we propose a rigorous professional development program in the areas of literacy, leadership and social-emotional supports. In order to build professional capacity, we will conduct intensive training focused on the need for teachers to differentiate instruction to engage and challenge all students. Professional development activities will highlight the importance of adapting activities to address the specific strengths and learning styles of each student. Leadership development will foster a school culture where faculty, students, family and community members collaborate to solve problems and accelerate results. Training will also emphasize social, emotional, and academic growth in a strong and safe school community.

School-Level Budget

School Name	Union Hill School
Federal intervention model:	Transformation

**PRE-IMPLEMENTATION GRANT BUDGET DETAIL
Union Hill School**

ALLOCATION OF FUNDS

1 ADMINISTRATORS:	# of staff	FTE	MTRS	Amount	Expenditure Justification
Supervisor/Director			<input type="checkbox"/>		
Project Coordinator			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
Stipends			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
SUB-TOTAL	0	0.00		\$ -	

2 INSTRUCTIONAL/PROFESSIONAL STAFF:	# of staff	FTE	MTRS	Amount	Expenditure Justification
_____			<input type="checkbox"/>		26 Teachers x 6 hrs x 10 days @ \$30/hr
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
Stipends			<input type="checkbox"/>	\$ 46,800	
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
SUB-TOTAL	0	0.00		\$ 46,800	

3 SUPPORT STAFF	# of staff	FTE	MTRS	Amount	Expenditure Justification
Aides/Paraprofessionals			<input type="checkbox"/>		12 Instructional Aides x 6 hrs x 10 days @ \$14-\$21/hr
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
Secretary/Bookkeeper			<input type="checkbox"/>		
Other			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
_____			<input type="checkbox"/>		
Stipends			<input type="checkbox"/>	\$ 15,120	
SUB-TOTAL	0	0.00		\$ 15,120	

4 FRINGE BENEFITS:	Amount	Expenditure Justification
4-a MTRS Automatically calculates if MTRS box is checked for any staff listed above.	\$0	
4-b OTHER FRINGE BENEFITS (Other retirement systems, health insurance, FICA - Describe below)		

SUB-TOTAL	\$0	

School-Level Budget

School Name	Union Hill School
Federal intervention model:	Transformation

5 CONTRACTUAL SERVICES	Rate (\$)	Hour/Day	Amount	Expenditure Justification
Consultants	50-100	hr	\$ 30,000	Consultants will provide professional development during the month of August to teachers and instructional aides. Professional development will include guided reading and leadership to elementary teachers that emphasizes social, emotional, and academic growth in a strong and safe school community.

Specialists				

Instructors				

Speakers				

Substitutes				

Supplemental Educational Services (SES) - Contracted Service Provider				
Neglected or Delinquent Children - Contracted Service Provider (if applicable)				
Other				

SUB-TOTAL			\$ 30,000	
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6 SUPPLIES AND MATERIALS	Amount	Expenditure Justification
Textbooks and Instructional Materials		

Instructional Technology including Software		

Non-instructional Supplies		

SUB-TOTAL	\$ -	
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7 TRAVEL: Mileage, conference registration, hotel and meals	Amount	Expenditure Justification
Supervisory Staff		

Instructional Staff		

Other		

SUB-TOTAL	\$ -	
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8 OTHER COSTS:	Amount	Expenditure Justification
Transportation of Students		
Memberships/Subscriptions		
Advertising		
Printing/Reproduction		
Maintenance/Repairs		
Rental of Space		
Rental of Equipment		
Telephone/Utilities		

SUB-TOTAL	\$ -	
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9 INDIRECT COSTS - <i>Must be entered directly on Combined Budget Worksheet</i>	Amount	Expenditure Justification
10 EQUIPMENT: Only list items costing \$5,000 or more per unit and having a useful life of more than one year. Describe below.		
Instructional Equipment _____		
Non-instructional Equipment _____		

SUB-TOTAL	\$ -	
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School-Level Budget

School Name	Union Hill School
Federal intervention model:	Transformation
TOTAL FUNDS REQUESTED	\$ 91,920

School-Level Budget

School Name	Union Hill School
Federal intervention model:	Transformation

SUMMARY OF GRANT REQUEST ACROSS FOUR YEARS

Manually enter estimated amounts for FY13 and FY14, if applicable.

		Amount					Narrative Summary for FY13 and FY14 Grant Budget Request
		Pre-Imp	FY12	FY13	FY14	Total	
1	ADMINISTRATORS	\$0	\$0			\$0	
2	INSTRUCTIONAL/ PROFESSIONAL STAFF	\$46,800	\$571,170	\$571,170	\$571,170	\$1,760,310	Staff \$219,000 - New Lead Teacher (1.0), New Librarian (1.0), New Additional Health Teacher (0.5), Additional School Adjustment Counselor (0.5) Stipends \$352,170: Increased Learning Opportunity 26 Teachers x 1.5 hrs x 180 days @ \$30/hr = \$210,600 Additional 90 hours of Staff Development 26 Teachers x 90 hrs @ \$30/hr = \$70,200 Common Planning Time 26 Teachers x 5 hrs x 183 days @ \$30/hr =
3	SUPPORT STAFF	\$15,120	\$0			\$15,120	
4	FRINGE BENEFITS	\$0	\$46,005	\$46,005	\$46,005	\$138,015	MTRS and Other Fringe
5	CONTRACTUAL SERVICES	\$30,000	\$82,000	\$82,000	\$82,000	\$276,000	Contractual service providers will provide professional development to teachers throughout the school year. These specialists will provide specific professional development based on deficits identified by the school redesign team.
6	SUPPLIES AND MATERIALS	\$0	\$80,000	\$80,000	\$80,000	\$240,000	Instructional materials: Funding would be used to purchase "leveled readers" for each of the schools. This material would be used by teachers in helping to engage students. They are designed to build fluency and independence for students. A collection of original fiction and nonfiction texts will allow students to apply skills and strategies at their own instructional levels. Library materials – Funding would be used to purchase library materials that would be placed into each of the school's libraries. These materials would be readily available to students who often don't have such resources within their
7	TRAVEL	\$0	\$0			\$0	
8	OTHER COSTS	\$0	\$0			\$0	
10	EQUIPMENT	\$0	\$0			\$0	
TOTAL FUNDS REQUESTED FOR LEA		\$91,920	\$779,175	\$779,175	\$779,175	\$2,429,445	

B. APPLICANT AGENCY Worcester **District Code: 0348** Implementation: FY 2012

Contact Person: Gregory Bares Address: 20 Irving Street Worcester 01609
 Telephone: 508 799 3108 x Email address: baresg@worc.k12.ma.us
 Alternative phone #: 508 799 3012 Submission Date: 28-Jan-11

PLEASE PROVIDE ALL OF THE INFORMATION REQUESTED ABOVE AND SUBMIT ALL PAGES OF THE BUDGET DETAIL.

C. ASSIGNMENT THROUGH SCHEDULE A

Check this box ONLY if this project will be using funds assigned by more than one agency. A completed Schedule A, with signatures and the amount of funds assigned by each participating agency, must be attached to this Budget Detail.

D. STAFFING CATEGORIES	E. # OF STAFF	F. FTE	G. MTRS*	H. AMOUNT	I. TOTAL
1. ADMINISTRATORS:					
Supervisor/Director (MTRS)			<input type="checkbox"/>		
Project Coordinator (MTRS)			<input type="checkbox"/>		
Supervisor/Director			<input type="checkbox"/>		
Project Coordinator			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
Stipends			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
SUB-TOTAL					
2. INSTRUCTIONAL/ PROFESSIONAL STAFF:				Do not use cents	
	8	6.0	✓	\$366,000	
			<input type="checkbox"/>		
			<input type="checkbox"/>		
Stipends			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>	\$789,885	
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
SUB-TOTAL	8	6.00			\$1,155,885

D. STAFFING CATEGORIES	E. # OF STAFF	F. FTE	G. MTRS*	H. AMOUNT	I. TOTAL
3. SUPPORT STAFF					
Aides/Paraprofessionals (MTRS)			<input type="checkbox"/>		
Aides/Paraprofessionals			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
Secretary/Bookkeeper (MTRS)			<input type="checkbox"/>		
Secretary/Bookkeeper			<input type="checkbox"/>		
			<input type="checkbox"/>		
Other			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
Stipends (MTRS)			<input type="checkbox"/>		
Stipends			<input type="checkbox"/>		
SUB-TOTAL					

* Check the MTRS box if the identified employee(s) is/are a member of the MA Teachers' Retirement System. This requirement only applies to federally-funded grant programs.

4. FRINGE BENEFITS:	AMOUNT	LINE ITEM SUB-TOTAL
4-a MA TEACHERS' RETIREMENT SYSTEM (Federally-funded grants only)	\$32,940	
4-b OTHER FRINGE BENEFITS (Other retirement systems, health insurance, FICA)	\$59,069	
SUB-TOTAL		\$92,009

5. CONTRACTUAL SERVICES: Indicate the services to be provided and the rate to be paid per hour or per day, whichever is applicable.	Rate(\$)	Hour/Day	H. AMOUNT	I. LINE ITEM SUB-TOTAL
CONSULTANTS -			\$159,000	
SPECIALISTS -				
INSTRUCTORS -				
SPEAKERS -				
SUBSTITUTES -				
OTHER -				
SUB-TOTAL				\$159,000

PART II - PROJECT EXPENDITURES - DETAIL INFORMATION			A. FUND CODE: 511/767	
B. APPLICANT AGENCY Worcester		District Code: 0348	Implementation: FY 2012	
6. SUPPLIES AND MATERIALS: Items costing less than \$5,000 per unit <i>or</i> having a useful life of less than one year.			H. AMOUNT	I. LINE ITEM SUB-TOTAL
TEXTBOOKS AND INSTRUCTIONAL MATERIALS -			\$84,000	
INSTRUCTIONAL TECHNOLOGY INCLUDING SOFTWARE -				
NON-INSTRUCTIONAL SUPPLIES -			\$74,000	
SUB-TOTAL				\$158,000
7. TRAVEL: Mileage, conference registration, hotel, and meals				
SUPERVISORY STAFF -				
INSTRUCTIONAL STAFF -				
OTHER -				
SUB-TOTAL				
8. OTHER COSTS: Please indicate the amount requested in each category				
			Do not use cents	
Transportation of Students				
Memberships/Subscriptions				
Advertising				
Printing/Reproduction				
Maintenance/Repairs				
Rental of Space				
Rental of Equipment				
Telephone/Utilities				
SUB-TOTAL				
9. INDIRECT COSTS: First, click on the 'Indirect Cost Calculator' link to access the worksheet to calculate maximum amount that can be used for indirect costs. Then enter approved rate and the amount from the 'Indirect Cost Calculator' worksheet (cell D13 or D22) in the green cell to the right:			Approved Rate:	Click here Indirect Cost Calculator
				\$15,807
10. EQUIPMENT: Provide a statement of need and cost of each item in the Notes Page. Items costing \$5,000 or more per unit <i>and</i> having a useful life of more than one year.			H. AMOUNT	I. LINE ITEM SUB-TOTAL
INSTRUCTIONAL EQUIPMENT				
NON-INSTRUCTIONAL EQUIPMENT				
SUB-TOTAL				
TOTAL FUNDS REQUESTED				\$1,580,701

**MASSACHUSETTS DEPARTMENT OF ELEMENTARY & SECONDARY EDUCATION
STANDARD APPLICATION FOR PROGRAM GRANTS**

**FORM AM 1
(AMENDMENT REQUEST FORM)**

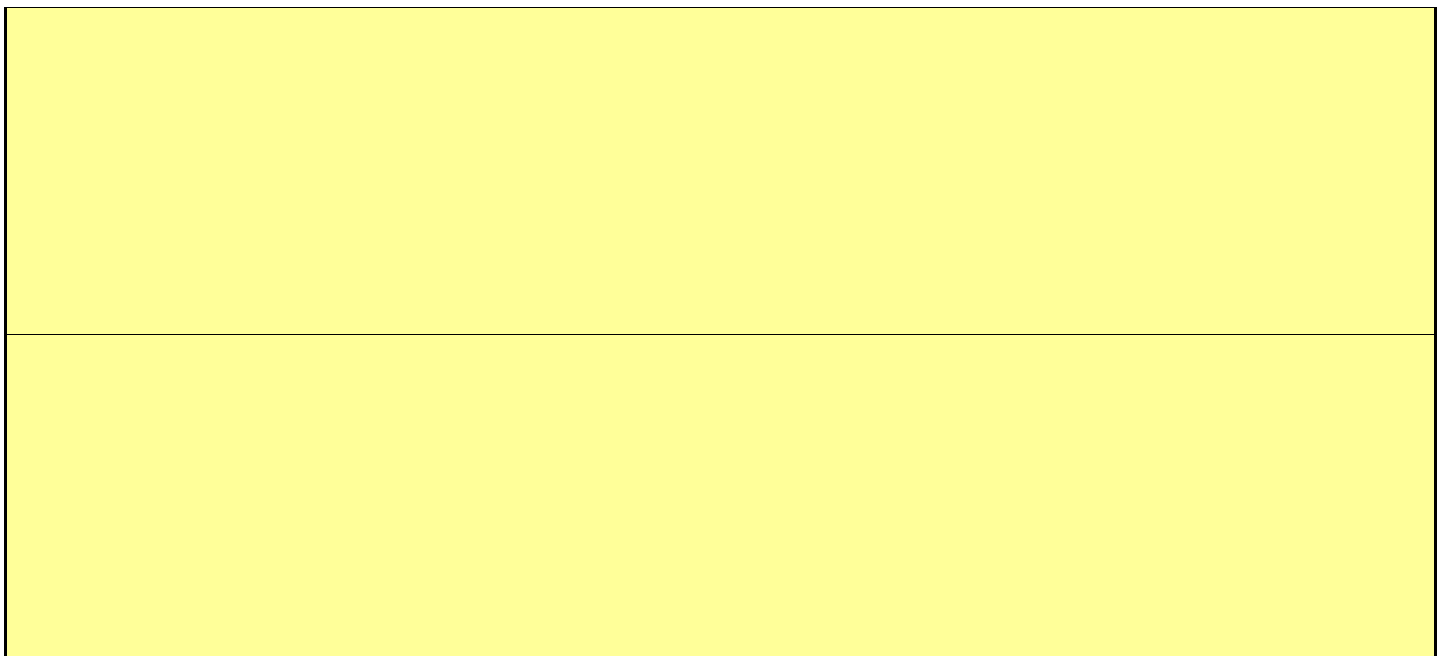
PART 1:

- A. Fill in the highlighted sections of Parts I and II only (Part III will be calculated automatically) and submit the request at least 30 days prior to the proposed change and no later than 30 days prior to the termination date of the project.
- B. Email the entire workbook to: SRG@doe.mass.edu
- C. Also, mail two copies of this signed Amendment form to:
Janet Pineault, Center for Targeted Assistance
Massachusetts Department of Elementary and Secondary Education
75 Pleasant Street Malden, MA 02148-4906
- D. Amendment requests must be approved in writing by an authorized representative of the Department of Elementary and Secondary Education prior to implementation.

E. Grant Recipient: (Legal Name of Agency)	Worcester 0348	FY12
F. Address: (Street, City/Town/Zip Code)	20 Irving Street Worcester	01609
G. Project Number:		
H. Name of grant program/ Source of funds	Implementation - School Redesign Grant	
I. Name of person Completing this report: (Print or Type)	Name:	
	Title:	
	Phone Number:	

PART II

Justification: Provide a detailed explanation and justification of why the proposed amendment should be implemented. Describe how this change will affect the original program plan. Describe any changes to school allocation amounts and/or reservations (set-asides). Attach additional sheets if the space provided is insufficient. Update narrative details on Activity worksheets, as necessary. Precede any updated text with "[Date] Amendment". **(Note: the "Enter" key works only when "Alt" + "Enter" are pressed together)**



PART III: (This section will be automated and data SHOULD NOT be entered by school district personnel)

A. Column A will be filled in by the Department of Elementary & Secondary Education

B. Column B will be filled in by the Dept of Elementary & Secondary Education as each amendment is approved.

C. Column C will fill in automatically as line item changes are made to the budget sheet.

D. Column D will fill in automatically according to changes in Column C.

		Column A	Column B	Column C	Column D
LINE ITEM		BUDGET APPROVED ORIGINALLY	APPROVED AMENDED BUDGET (If applicable)	AMENDMENT REQUEST	REVISED BUDGET
1. Administrators					
2. Instructional/Direct Service Staff				\$1,155,885	\$1,155,885
3. Support Staff					
4. Fringe	MTRS			\$32,940	\$32,940
Benefits	Other			\$59,069	\$59,069
5. Contractual Services				\$159,000	\$159,000
6. Supplies				\$158,000	\$158,000
7. Travel					
8. Other					
9. Indirect Costs				\$15,807	\$15,807
10. Equipment					
11. Total				\$1,580,701	\$1,580,701

I CERTIFY THAT THE INFORMATION CONTAINED IN THIS AMENDMENT REQUEST IS CORRECT AND COMPLETE; THAT THE APPLICANT AGENCY HAS AUTHORIZED ME, AS ITS REPRESENTATIVE, TO FILE THIS APPLICATION; AND I UNDERSTAND THAT FOR ANY FUNDS RECEIVED THROUGH THIS AMENDMENT REQUEST THE AGENCY AGREES TO COMPLY WITH ALL APPLICABLE STATE AND FEDERAL GRANT REQUIREMENTS COVERING BOTH THE PROGRAMMATIC AND FISCAL ADMINISTRATION OF GRANT FUNDS.

I CERTIFY FURTHER THAT IF THE DISTRICT INTENDS TO SPEND LESS THAN THE AMOUNT NEEDED TO MEET ITS 20 PERCENT OBLIGATION ON CHOICE-RELATED TRANSPORTATION AND SUPPLEMENTAL EDUCATIONAL SERVICES (SES) IN A GIVEN SCHOOL YEAR, THE DISTRICT MEETS ALL OF THE FOLLOWING CRITERIA: (1) THE DISTRICT HAS PARTNERED, TO THE EXTENT PRACTICABLE, WITH OUTSIDE GROUPS TO HELP INFORM ELIGIBLE STUDENTS AND THEIR FAMILIES OF THE OPPORTUNITIES TO TRANSFER OR TO RECEIVE SES; (2) THE DISTRICT HAS ENSURED THAT ELIGIBLE STUDENTS AND THEIR PARENTS HAD A GENUINE OPPORTUNITY TO SIGN UP TO TRANSFER OR TO OBTAIN SES, AND WERE PROVIDED AT LEAST TWO SES ENROLLMENT PERIODS; (3) THE DISTRICT HAS ENSURED THAT ELIGIBLE SES PROVIDERS WERE GIVEN ACCESS TO SCHOOL FACILITIES USING A FAIR, OPEN, AND OBJECTIVE PROCESS, ON THE SAME BASIS AND TERMS AS ARE AVAILABLE TO OTHER GROUPS THAT SEEK ACCESS TO SCHOOL FACILITIES; AND (4) THE DISTRICT MAINTAINS RECORDS THAT IT HAS MET THESE CRITERIA.

1. Signature of Authorized Representative:	<input checked="" type="checkbox"/>
2. Typed or Printed Name:	
3. Title:	
4. Date Report Submitted:	

PART IV (To be completed by the Department of Elementary & Secondary Education) ACTION TAKEN

A. APPROVED		EFFECTIVE DATE OF APPROVAL:	
B. DISAPPROVED		REASON FOR DISAPPROVAL:	
1. Signature of Authorized ESE Representative:	<input checked="" type="checkbox"/>		
2. Typed or Printed Name:			
3. Title:			
4. Date:			

PART II - PROJECT EXPENDITURES - DETAIL INFORMATION

A. FUND CODE: 511/767

B. APPLICANT AGENCY

Worcester

District Code: 0348

Pre-Implementation: **FY 2011**

Contact Person: **Gregory Bares**

Address: **20 Irving Street**

Worcester 01609

Telephone: **508 799 3108**

x

Email address:

baresg@worc.k12.ma.us

Alternative phone #: **508 799 3012**

Submission Date:

28-Jan-11

PLEASE PROVIDE ALL OF THE INFORMATION REQUESTED ABOVE AND SUBMIT ALL PAGES OF THE BUDGET DETAIL.

C. ASSIGNMENT THROUGH SCHEDULE A

Check this box ONLY if this project will be using funds assigned by more than one agency. A completed Schedule A, with signatures and the amount of funds assigned by each participating agency, must be attached to this Budget Detail.

D. STAFFING CATEGORIES	E. # OF STAFF	F. FTE	G. MTRS*	H. AMOUNT	I. TOTAL
1. ADMINISTRATORS:					
Supervisor/Director (MTRS)			<input type="checkbox"/>		
Project Coordinator (MTRS)			<input type="checkbox"/>		
Supervisor/Director			<input type="checkbox"/>		
Project Coordinator			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
Stipends			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
SUB-TOTAL					
2. INSTRUCTIONAL/ PROFESSIONAL STAFF:					
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
Stipends			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>	\$95,400	
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
SUB-TOTAL					\$95,400

B. APPLICANT AGENCY

Worcester

District Code: 0348

Pre-Implementation: FY 2011

D. STAFFING CATEGORIES	E. # OF STAFF	F. FTE	G. MTRS*	H. AMOUNT	I. TOTAL
3. SUPPORT STAFF					
Aides/Paraprofessionals (MTRS)			<input type="checkbox"/>		
Aides/Paraprofessionals			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
Secretary/Bookkeeper (MTRS)			<input type="checkbox"/>		
Secretary/Bookkeeper			<input type="checkbox"/>		
			<input type="checkbox"/>		
Other			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
Stipends (MTRS)			<input type="checkbox"/>		
Stipends			<input type="checkbox"/>	\$23,940	
SUB-TOTAL					\$23,940

* Check the MTRS box if the identified employee(s) is/are a member of the MA Teachers' Retirement System. This requirement only applies to federally-funded grant programs.

4. FRINGE BENEFITS:	AMOUNT	LINE ITEM SUB-TOTAL
4-a MA TEACHERS' RETIREMENT SYSTEM (Federally-funded grants only)		
4-b OTHER FRINGE BENEFITS (Other retirement systems, health insurance, FICA)		
SUB-TOTAL		

5. CONTRACTUAL SERVICES: Indicate the services to be provided and the rate to be paid per hour or per day, whichever is applicable.	Rate(\$)	Hour/Day	H. AMOUNT	I. LINE ITEM SUB-TOTAL
CONSULTANTS -			\$60,000	
SPECIALISTS -				
INSTRUCTORS -				
SPEAKERS -				
SUBSTITUTES -				
OTHER -				
SUB-TOTAL				\$60,000

PART II - PROJECT EXPENDITURES - DETAIL INFORMATION			A. FUND CODE: 511/767		
B. APPLICANT AGENCY Worcester		District Code: 0348	Pre-Implementation: FY 2011		
6. SUPPLIES AND MATERIALS: Items costing less than \$5,000 per unit <i>or</i> having a useful life of less than one year.			H.	I.	
			AMOUNT	LINE ITEM SUB-TOTAL	
TEXTBOOKS AND INSTRUCTIONAL MATERIALS -					
INSTRUCTIONAL TECHNOLOGY INCLUDING SOFTWARE -					
NON-INSTRUCTIONAL SUPPLIES -					
SUB-TOTAL					
7. TRAVEL: Mileage, conference registration, hotel, and meals					
SUPERVISORY STAFF -					
INSTRUCTIONAL STAFF -					
OTHER -					
SUB-TOTAL					
8. OTHER COSTS: Please indicate the amount requested in each category					
			Do not use cents		
Transportation of Students					
Memberships/Subscriptions					
Advertising					
Printing/Reproduction					
Maintenance/Repairs					
Rental of Space					
Rental of Equipment					
Telephone/Utilities					
SUB-TOTAL					
9. INDIRECT COSTS: First, click on the 'Indirect Cost Calculator' link to access the worksheet to calculate maximum amount that can be used for indirect costs. Then enter approved rate and the amount from the 'Indirect Cost Calculator' worksheet (cell D13 or D22) in the green cell to the right:		Approved Rate:	2.00%	Click here Indirect Cost Calculator	\$1,811
10. EQUIPMENT: Provide a statement of need and cost of each item in the Notes Page. Items costing \$5,000 or more per unit <i>and</i> having a useful life of more than one year.			H.	I.	
			AMOUNT	LINE ITEM SUB-TOTAL	
INSTRUCTIONAL EQUIPMENT					
NON-INSTRUCTIONAL EQUIPMENT					
SUB-TOTAL					
TOTAL FUNDS REQUESTED				\$181,151	

**MASSACHUSETTS DEPARTMENT OF ELEMENTARY & SECONDARY EDUCATION
STANDARD APPLICATION FOR PROGRAM GRANTS**

**FORM AM 1
(AMENDMENT REQUEST FORM)**

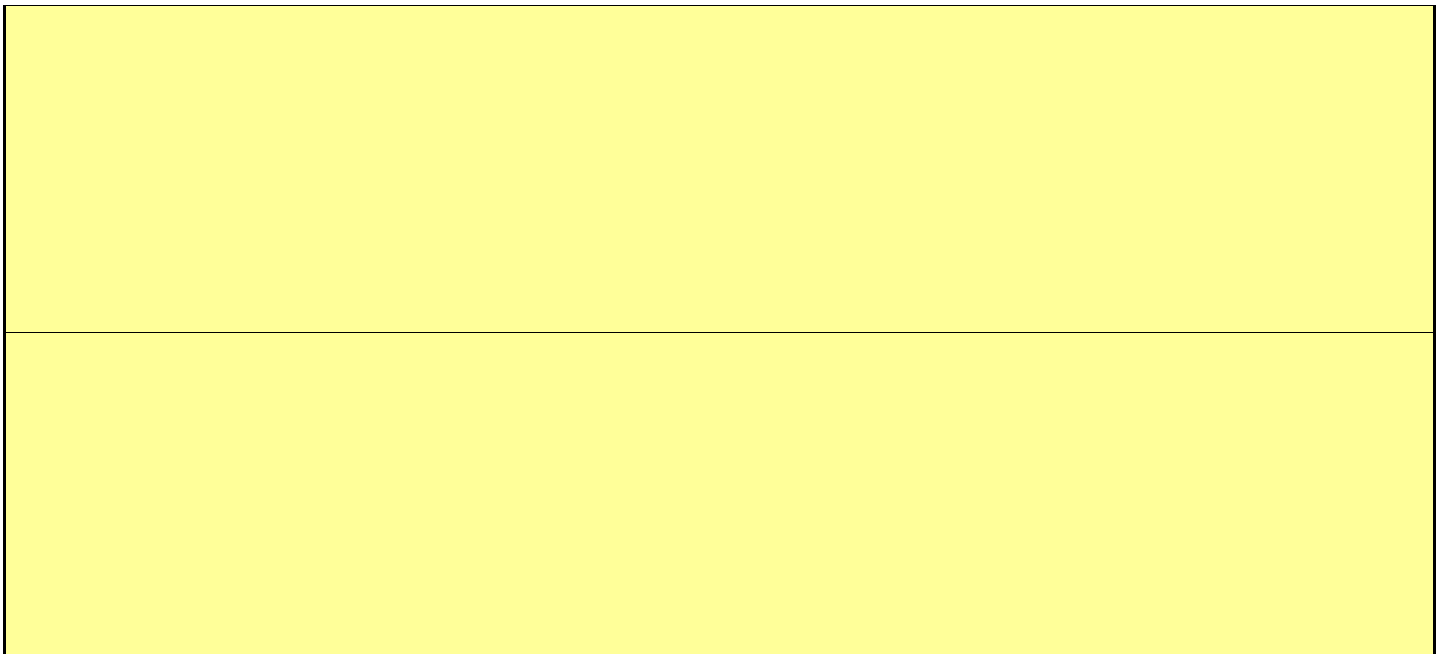
PART 1:

- A. Fill in the highlighted sections of Parts I and II only (Part III will be calculated automatically) and submit the request at least 30 days prior to the proposed change and no later than 30 days prior to the termination date of the project.
- B. Email the entire workbook to: SRG@doe.mass.edu
- C. Also, mail two copies of this signed Amendment form to:
Janet Pineault, Center for Targeted Assistance
Massachusetts Department of Elementary and Secondary Education
75 Pleasant Street Malden, MA 02148-4906
- D. Amendment requests must be approved in writing by an authorized representative of the Department of Elementary and Secondary Education prior to implementation.

E. Grant Recipient: (Legal Name of Agency)	Worcester 0348	FY11
F. Address: (Street, City/Town/Zip Code)	20 Irving Street Worcester	01609
G. Project Number:		
H. Name of grant program/ Source of funds	Pre-implementation - School Redesign Grant	
I. Name of person Completing this report: (Print or Type)	Name:	
	Title:	
	Phone Number:	

PART II

Justification: Provide a detailed explanation and justification of why the proposed amendment should be implemented. Describe how this change will affect the original program plan. Describe any changes to school allocation amounts and/or reservations (set-asides). Attach additional sheets if the space provided is insufficient. Update narrative details on Activity worksheets, as necessary. Precede any updated text with "[Date] Amendment". **(Note: the "Enter" key works only when "Alt" + "Enter" are pressed together)**



PART III: (This section will be automated and data SHOULD NOT be entered by school district personnel)

- A. Column A will be filled in by the Department of Elementary & Secondary Education
- B. Column B will be filled in by the Dept of Elementary & Secondary Education as each amendment is approved.
- C. Column C will fill in automatically as line item changes are made to the budget sheet.
- D. Column D will fill in automatically according to changes in Column C.

		Column A	Column B	Column C	Column D
LINE ITEM		BUDGET APPROVED ORIGINALLY	APPROVED AMENDED BUDGET (If applicable)	AMENDMENT REQUEST	REVISED BUDGET
1. Administrators					
2. Instructional/Direct Service Staff				\$95,400	\$95,400
3. Support Staff				\$23,940	\$23,940
4. Fringe Benefits	MTRS				
	Other				
5. Contractual Services				\$60,000	\$60,000
6. Supplies					
7. Travel					
8. Other					
9. Indirect Costs				\$1,811	\$1,811
10. Equipment					
11. Total				\$181,151	\$181,151

I CERTIFY THAT THE INFORMATION CONTAINED IN THIS AMENDMENT REQUEST IS CORRECT AND COMPLETE; THAT THE APPLICANT AGENCY HAS AUTHORIZED ME, AS ITS REPRESENTATIVE, TO FILE THIS APPLICATION; AND I UNDERSTAND THAT FOR ANY FUNDS RECEIVED THROUGH THIS AMENDMENT REQUEST THE AGENCY AGREES TO COMPLY WITH ALL APPLICABLE STATE AND FEDERAL GRANT REQUIREMENTS COVERING BOTH THE PROGRAMMATIC AND FISCAL ADMINISTRATION OF GRANT FUNDS.

I CERTIFY FURTHER THAT IF THE DISTRICT INTENDS TO SPEND LESS THAN THE AMOUNT NEEDED TO MEET ITS 20 PERCENT OBLIGATION ON CHOICE-RELATED TRANSPORTATION AND SUPPLEMENTAL EDUCATIONAL SERVICES (SES) IN A GIVEN SCHOOL YEAR, THE DISTRICT MEETS ALL OF THE FOLLOWING CRITERIA: (1) THE DISTRICT HAS PARTNERED, TO THE EXTENT PRACTICABLE, WITH OUTSIDE GROUPS TO HELP INFORM ELIGIBLE STUDENTS AND THEIR FAMILIES OF THE OPPORTUNITIES TO TRANSFER OR TO RECEIVE SES; (2) THE DISTRICT HAS ENSURED THAT ELIGIBLE STUDENTS AND THEIR PARENTS HAD A GENUINE OPPORTUNITY TO SIGN UP TO TRANSFER OR TO OBTAIN SES, AND WERE PROVIDED AT LEAST TWO SES ENROLLMENT PERIODS; (3) THE DISTRICT HAS ENSURED THAT ELIGIBLE SES PROVIDERS WERE GIVEN ACCESS TO SCHOOL FACILITIES USING A FAIR, OPEN, AND OBJECTIVE PROCESS, ON THE SAME BASIS AND TERMS AS ARE AVAILABLE TO OTHER GROUPS THAT SEEK ACCESS TO SCHOOL FACILITIES; AND (4) THE DISTRICT MAINTAINS RECORDS THAT IT HAS MET THESE CRITERIA.

1. Signature of Authorized Representative:	<input checked="" type="checkbox"/>
2. Typed or Printed Name:	
3. Title:	
4. Date Report Submitted:	

PART IV (To be completed by the Department of Elementary & Secondary Education) ACTION TAKEN

A. APPROVED		EFFECTIVE DATE OF APPROVAL:	
B. DISAPPROVED		REASON FOR DISAPPROVAL:	
1. Signature of Authorized ESE Representative:	<input checked="" type="checkbox"/>		
2. Typed or Printed Name:			
3. Title:			
4. Date:			

AM 1

Revised 1 <<>>

Indirect Cost Calculation Worksheet

The following worksheet will automatically calculate the amount of funds that can be used by a LEA for indirect costs.

You will need to insert your LEA's approved allowable rate and total funds requested in the yellow boxes.

You will need to input the rate in either percentage (A) or decimal form (B). The "amount that can be used for indirect" is the maximum amount that your LEA can put in for indirect costs in line item 9. This worksheet assumes no capital expenditures. See other important notes below.

Indirect Cost Calculation (A) <i>Note: if percentage format used</i>		Input Your Grant Information Below
	Example	
Total Funds Requested	\$100,000	
Indirect Cost Percentage: If percentage used (2.18%)	2.18%	
Total Funds/(1+Percentage)	\$97,867	\$0
Maximum Amount that can be used for Indirect:	\$2,133	\$0

Indirect Cost Calculation (B) <i>Note: if decimal format used</i>		Input Your Grant Information Below
	Example	
Total Funds Requested	\$100,000	
Indirect Cost Percentage: If decimals used (.0218)	0.0218	
Total Funds/(1+Percentage)	\$97,867	\$0
Maximum Amount that can be used for Indirect:	\$2,133	\$0

[Back to Budget Page](#)

Important Notes regarding Indirect Costs:

For all LEAs in Massachusetts, costs must be consistent with the rate established by the Department's Office of School Finance. For other than school systems, applicant agencies must comply with provisions of CFR 34 S.76.561. (Please note that indirect costs are not allowable under certain grant programs. If you have any questions regarding this issue, contact the appropriate representative of the Department.)

LEAs are allowed to take less than the maximum, but not more than the maximum allowable for indirect costs.

In calculating the indirect cost allowable for a particular grant, note that indirect costs cannot be charged on either capital expenditures or on indirect costs themselves. To arrive at the allowable amount one cannot simply multiply a total entitlement by the indirect rate.

The decision to recover indirect costs using these established rates is a local option. The rates are developed for LEA as the maximum allowable rate for a given fiscal year.

If indirect costs are recovered, they shall be returned to the general fund of the city or town in accordance with G.L. Chapter 44, Section 53. In the case of regional schools, indirect costs shall be returned to the regional school general fund.