



LINCOLN PUBLIC SCHOOLS

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June 20, 2010

To: School Committee
Mickey Brandmeyer
From: Buckner Creel

Subject: FY11 Financial Assistance Update

Background. The School Committee approved Policy JLB Student Financial Assistance on October 14, 2010. Policy JLB "...addresses possible adjustments in the form of a reduction to fees associated with transportation, athletics, curriculum-based overnight field trips and instrument rental for in-school music activities (LASMP is excluded)." Prior to the formal policy decision, financial assistance was given through a variety of ad-hoc processes. The Student Financial Assistance policy outlines eligibility criteria and includes an application process. What follows are some brief observations on the Lincoln School's experience with the policy to date.

Applications. Applications for assistance began in December, 2010. As of June 10, 2011, twelve applications requesting assistance for 16 students were received. One application is pending additional information, and the rest were approved. Of the eleven application approved, eight received a full waiver of fees, two received a waiver of 75% of fees, and one received a waiver of 25%.

Transportation. We had collected bus fees for the 2010-2011 school year prior to the approval of the new policy. As in years past, financial assistance in the form of waived bus fees was given to twelve students based on School Lunch Program status. Those qualifying for free lunch received a total waiver; those qualifying for reduced lunch received a waiver of 73% of the fee. Using that standard, financial assistance of \$2,706.36 was given out.

There was no impact on the health of the School Bus Fee revolving fund for this year, as anticipated receipts approximately balances planned expenditures. The ad-hoc method used is less generous than the approved policy, so it seems appropriate to project a greater impact on revenues next year. We will examine the FY12 experience in determining the FY14 budget, but do not recommend transferring money from the legacy fund to make up the FY11 revenue reduction.

Athletic Fees. The fall sports season was underway when the approved policy was published, so the implementation really began with the winter season (basketball). Using ad-hoc methods, financial assistance of \$1,400 was given to students for fall sports, and \$1,550 was given to students for winter and spring sports under the approved policy, for a total of \$2,950.

There was no impact on the health of the Athletic Program revolving fund for this year, as receipts exceeded planned expenditures. It seems appropriate to project a greater impact on revenues next year. We will examine the FY12 experience in determining the FY14 budget, but do not recommend transferring money from the legacy fund to make up the FY11 revenue reduction.

Curriculum-based overnight field trips. Using ad-hoc methods, financial assistance of \$1,760 was given to 7th grade students for the Sargent Center field trip. The money to fund this assistance was built into the field trip fee structure. Similarly, the fee for the 8th grade DC trip, constructed before approval of the new policy, contained a \$27 amount

for contingencies such as financial assistance. Financial assistance of \$3,050 was given using the new process, which exceeded the financial assistance “budget” of \$2,079. Accordingly, \$971 was transferred from the Legacy fund to cover the financial assistance.

Based on this year’s experience, it seems reasonable to expect requests for financial assistance for curriculum-based overnight field trips to exceed \$5,000.

Conclusions. The process for applying for financial assistance seems to function satisfactorily, and will be advertised in the Parent Handbook and in the announcement letters to parents for activities requiring fees. Financial assistance for athletic and bus fees did not draw on the Legacy fund during FY11, but that situation could change in the future.

The current fund balance of the Legacy Fund is \$8,463.12. At the projected rate of financial assistance, the Fund will be depleted within two years without replenishment, at which time the School Committee will need to include funds in the operating budget.



STUDENT FINANCIAL ASSISTANCE

The Lincoln Public Schools is committed to ensuring that all students participate in all aspects of the educational program, including extra curricular activities and services that are fee based. This policy addresses possible adjustments in the form of a reduction to fees associated with, transportation, athletics, curriculum-based overnight field trips and instrument rental for in-school music activities (LASMP is excluded). Over the past several years the costs for these activities has increased resulting in more and greater requests for financial assistance. The school district benefits from generous financial support from the community and groups or organizations associated with the school district, which contribute to funds to support school activities.

This policy is designed to ensure a fair assessment of financial need and to provide an objective measure, which the school district can apply to requests for financial assistance.

The following policy and procedures, based on the Federal Poverty Assistance guideline will be used to determine eligibility and levels of support.

Financial Assistance Guidelines

1. The following guidelines apply to financial assistance for fees
2. Up to 100% financial assistance is available to families earning less than two times the Federal Poverty Guideline.
3. Reduced fees are available for families earning less than three and one-half times the Federal Poverty Guideline
4. In order to apply for waiver or reduction of fees an annual application must be completed prior to the start of the activity for which the fee is assessed (for the 2010-2011 school year applications must be received before October 30th for consideration for retroactive fee reductions for fall activities and before the start of activities for which the fees that will be assessed after October 30th).
5. Copies of the following documentation are required with a family's application for financial assistance
 - a. Signed federal tax return(s) for the most recent tax filing year in the form of IRS 1040 pages 1 and 2 including all supporting schedules for all adults residing in the household, and if applicable:
 - b. Transitional Assistance Letter (issued in August);
 - c. Child Support and Alimony agreements;
 - d. Supplemental Security Income (SSI) and Disability Income;
 - e. Section 8 Housing Voucher
 - f. Any other documentation to demonstrate a change in income for financial status since the most recent tax year filing, such as, records of

unemployment compensation, layoff notice, payroll statements showing reduced earnings, etc.

6. The district will verify sources of income or other holdings through public agencies and public records as may be necessary to make a determination.
7. All documentation will be kept confidential in the Business Office and will not be included in any student file. All documentation will be retained until the student leaves the Lincoln Public Schools, at which time it will be destroyed.
8. Applications must include all required documentation. Incomplete applications will be returned. Only one application per year is required, a copy of an approval letter may be supplied with additional requests within a school year or for additional students.
9. Applications will be submitted to the Administrator for Business and Finance who will review, make eligibility determinations and notify the applicant and school Principal.
10. The following schedule will be used for the 2010-2011 school year to determine eligibility and level of assistance.

Federal Guidelines				Lincoln Salary Guidelines			
Persons in family or household	2010 Federal Poverty Guidelines	Free Lunch eligibility (130%)	Reduced Lunch eligibility (185%)	Full Fee Waiver (200% of guideline)	Fee Reduction of 75% (250% of guideline)	Fee Reduction of 50% (300% of guideline)	Fee Reduction of 25% (350% of guideline)
1	\$10,830	\$14,079	\$20,036	\$21,660	\$27,075	\$32,490	\$37,905
2	\$14,570	\$18,941	\$26,955	\$29,140	\$36,425	\$43,710	\$50,995
3	\$18,310	\$23,803	\$33,874	\$36,620	\$45,775	\$54,930	\$64,085
4	\$22,050	\$28,665	\$40,793	\$44,100	\$55,125	\$66,150	\$77,175
5	\$25,790	\$33,527	\$47,712	\$51,580	\$64,475	\$77,370	\$90,265
6	\$29,530	\$38,389	\$54,631	\$59,060	\$73,825	\$88,590	\$103,355
7	\$33,270	\$43,251	\$61,550	\$66,540	\$83,175	\$99,810	\$116,445
8	\$37,010	\$48,113	\$68,469	\$74,020	\$92,525	\$111,030	\$129,535
For each additional person add	\$3,740	\$4,862	\$6,919	\$7,480	\$9,350	\$11,220	\$13,090

11. Each May, the Administrator for Business and Finance will prepare a financial analysis of the impact of this policy and the School Committee will review the policy to determine if adjustments are necessary.

Adopted at School Committee Meeting of October 14, 2010