

**SITE OPERATIONS CIRCULAR NO. 1001**  
Office of School Support Services

**SAN DIEGO UNIFIED SCHOOL DISTRICT**

- Date:** August 19, 2013
- To:** All Principals; School Site Council (SSC) Chairpersons, Area Superintendents, Division and Department Heads
- Subject:** EXPENDITURE OF MAJOR CATEGORICAL FUNDS FOR 2013-14
- Department and/or Persons Concerned:** All Principals and SSC Chairpersons
- Reference:** Education Code 52853(b)
- Action Requested:**
1. Submit PARS for personnel changes funded by categorical programs.
  2. Use the *Major Categorical Funds—Justification of Expenditure for Budget Transfer 2013-14* forms as needed.
  3. Review Major Categorical Funds Expenditure Guidelines with SSC.
- Attachment 1** Major Categorical Funds Expenditure Guidelines for 2013-2014
- Attachment 2** Major Categorical Funds, Justification of Expenditure for Budget Transfer 2013-14
- Attachment 3** Major Categorical Funds, Justification of Expenditure for Budget Transfer 2013-14 Samples
- Attachment 4** Major Categorical Funds, Justification of Expenditure for Expense Transfer 2013-14 Samples
- Attachment 5** Sample SSC Meeting Minutes 2013-14 Samples
- Attachment 6** Categorical Spending Guidelines 2013-14
- Attachment 7** Monitoring & Accountability Reporting Department 2013-14 Contact Information

**Brief Explanation:**

State Education Code requires that the School Site Council (SSC) oversee the strategies and budgets associated with the Single Plan for Student Achievement (SPSA). Categorical budgets associated with the SPSA can include PI funds and categorical funded strategies prescribed by the Western Association of Schools and Colleges (WASC) recommendation.

Sites have been allocated categorical funds for the 2013-14 school year. The SPSA and corresponding categorical budgets are reviewed by the Monitoring and Accountability Reporting Department and approved by the Board of Education. As plans are adjusted during the year, budget allocations may need to be adjusted as well.

High schools undergoing WASC visits should use their SPSAs to provide support and strategies to improve student achievement as outlined in their WASC plans. Plans should be implemented or revised using current student data. SPSAs will include WASC criteria that integrate the Essential Program Components in the Schoolwide Action Plan to address closing student achievement gaps.

### **Intent and Use of Categorical Funds:**

The intent of supplementary categorical programs funding is to provide **direct instructional support** to students beyond the educational program provided by the district. **All supplies and expenses must provide a direct connection to students and their academic achievement, and must be clearly identified and justified as supporting student achievement.**

Expenditures for 2013-14 from the following categorical programs must be reviewed by the SSC on an ongoing basis in relation to the goals/strategies identified in the site plan:

- Title I Part A Basic Program [Resource Code 30100]
- Title I Parent Involvement [Resource Code 30103]
- Title 1 Program Improvement [Resource Code 30106]
- School Improvement Grant (SIG) [31802 and 31812] – these funds are grant specific and may not be adjusted
- Economic Impact Aid/State Compensatory Education (EIA/SCE) [Resource Code 70900]
- Economic Impact Aid/Limited English Proficient (EIA/LEP) [Resource Code 70910]
- Quality Education Investment Act (QEIA) [Resource Code 74000]

Light refreshments are allowable from Parent Involvement funds (Resource Code 30103) for parent meetings that focus on improving student achievement. As a reminder, meals may not be funded with categorical money. Additional restrictions are listed in Attachment 1, *Major Categorical Funds Expenditure Guidelines for 2013-14*.

Please review Attachment 1, *Major Categorical Funds Expenditure Guidelines for 2013-14*, with your SSC. This important information will help clarify appropriate uses of major categorical funds.

The SSC must be familiar with these requirements and should refer to these guidelines when creating the school plan and accompanying budget grid. **A vital consideration the Monitoring and Accountability Reporting (MAR) staff includes when approving expenditures of categorical funds, is documentation that the SSC has been involved in the plan development or revision and budget discussion (documented in meeting minutes).**

### **Instructions for Expending Funds Related to Categorical Budgets:**

For the following categorical budget requests, sites must complete the *Major Categorical Funds—Justification of Expenditure for Budget Transfer 2013-14* form (Attachment 2). MAR staff will review the site SPSA and approve any changes in the plan and/or proposed categorical budget expenditures prior to the budget analyst posting the budget transfers for expenditures. This form must be used for:

- 1) Changes in categorical expenditures (changes to funding strings and/or activities) that were allocated in the 2013-14 SPSA.

- 2) Transfer of expenses into categorical resources.

Review and approval by MAR staff of all categorical expenditures, including PARs for personnel changes, must be obtained **prior** to the purchase, event, or start date.

If expenditures are made without prior approval, they may be transferred to the site's unrestricted budget.

**To request categorical budget and expense transfers, sites should complete the following steps:**

1. **Meet with your SSC to review site student performance data related to student needs. The SSC must discuss and approve the needed changes/additions to the SPSA and associated budget allocations.**

**Transfers can only be processed if a quorum was established at the SSC meeting.**

2. Complete the *Major Categorical Funds—Justification of Expenditure for Budget Transfer 2013-14* form (Attachment 2). This form must be filled out completely and signed by the site principal and the SSC chairperson prior to submission.

Sample forms are provided for your reference. (See Attachment 3 and/or 4, *Major Categorical Funds—Justification of Expenditure for Budget Transfer 2013-14 Sample*; *Justification of Expenditure for Expense Transfer 2013-14 Sample*).

3. Submit the following documents to the Monitoring and Accountability Reporting Department:
  - **Original** of the *Major Categorical Funds—Justification of Expenditure for Budget Transfer 2013-14* with original signatures of the site principal and the SSC chairperson assuring that the SSC approved modifications to the SPSA and categorical budget.
  - **Copy of the minutes from the SSC meeting showing explicit changes to the SPSA that were approved, with discussion and approval highlighted. A quorum must have been established at the SSC meeting.**
  - **Expense transfers require an accompanying Budget Transaction Detail Report.**
4. Make sure that changes in the plan and categorical budgets are reflected in your current 2013-14 SPSA.
5. Maintain copies of the above documents and SPSA adjustments in your SSC Notebook.

Monitoring and Accountability Reporting Department staff will review the request and accompanying documentation and confirm that the proposed changes in the SPSA and categorical budget expenditures conform to the SPSA goals and are in compliance with federal, state, and district requirements related to categorical programs.

Monitoring and Accountability Reporting staff will send an e-mail notification to the site principal and budget analyst approving the request.

If you have questions regarding the expenditure of categorical funds, the appropriateness of expenditure, or the process used to request a transfer of expenditures, please call the Monitoring and Accountability Reporting Department at (619) 725-5609.

Vikki Henton  
Program Manager  
Monitoring and Accountability Reporting

APPROVED:



Nellie Meyer  
Deputy Superintendent  
School Support Services

Attachments (7)

Distribution: Lists B, D, E, F and O



San Diego Unified School District  
Office of Accountability  
Monitoring and Accountability Reporting Department

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**MAJOR CATEGORICAL FUNDS EXPENDITURE GUIDELINES  
2013-2014**

**A. FUNDS INCLUDED**

<b>Resource Code 30100</b>	Basic Program Title I/Part A	Part of the Elementary and Secondary Education Act, which provides federal money to support economically, disadvantaged students.
<b>Resource Code 30103</b>	Title I Parent Involvement	Used to encourage partnerships with parents to improve student achievement and increase parent involvement.
<b>Resource Code 30106</b>	Title 1 Program Improvement Supplemental (PI)	Supplemental funds to implement provisions of Elementary and Secondary Education Act. Funding is provided with the goal to improve student achievement while meeting the state's standards that will allow the school to exit PI status. Schools in PI year 3 receive the funds in preparation for PI year 4 and then receive it each year in PI thereafter.
<b>Resource Code 70900</b>	Economic Impact Aid/ State Compensatory Education (EIA/SCE)	Funds used to provide compensatory educational programs and services to educationally disadvantaged students to enable them to reach proficiency in literacy and mathematics.
<b>Resource Code 70910</b>	Economic Impact Aid / Limited English Proficiency (EIA/LEP)	Supplemental funds used to provide additional programs and services to English learners to enable them to become proficient in English.
<b>Resource Code 74000</b>	Quality Education Investment Act (QEIA)	Used solely to improve the quality of academic instruction and services to pupils. Limited schools receive these funds to meet the QEIA requirements.

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#### A. FUNDS INCLUDED - CONTINUED

<b>Resource Code 31802 and 31812</b>	School Improvement Grant (SIG)	Used to support persistently lowest achieving schools to raise academic achievement levels for students in attendance.
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#### B. PURPOSE

1. Focus on improving instruction and extending learning time. These programs enable schools to provide **supplemental** opportunities for students to achieve proficiency in the state content standards. Emphasis must be on **direct instructional support** to students in core subjects.
2. Professional development is a priority and is available to anyone in a schoolwide program, including teachers, classroom aides and, where appropriate, other staff and parents. Activities must be based on student needs at the school site.  
**A minimum of 10 percent of the total Title I allocation should be devoted to professional development. (Program Improvement schools must allocate 10 percent of Title I funds to Professional Development; Resources 30100/30106).**
3. **Supplement, not supplant**, the district's general program. Use of funds must add to or enhance, not replace district funds.
4. Foster new types of parent partnerships that focus on improving student achievement.

#### C. PROCESS

1. **Single Plan for Student Achievement (SPSA).**  
A needs assessment identifies student learning needs at the school site based on an analysis of current student performance data in relation to state standards. The focus is on the academic needs of the children. The students' educational needs drive the planning cycle. The SPSA describes strategies that will coordinate use of federal, state, and local resources to improve instruction and student achievement. The School Site Council (SSC) oversees and approves the plan and associated budget allocations for use of all above-listed categorical funds.
2. **Title I Schoolwide Program (SWP)**  
A federal program that puts emphasis on high achievement for all students while serving the most disadvantaged youth and providing flexibility in spending Title I funds. The SPSA serves as the Title I Schoolwide Plan.

#### D. BUDGET

1. Each site developed a budget for 2013-2014 to implement all strategies for each available funding source. It included but is not limited to staffing, materials, supplies, contracted services, and equipment that will directly enhance student learning at the school site. The SPSA and the categorical budget grid, which support all expenditures in the plan, will be approved by the Board of Education.
2. The SSC must approve transfers of allocations within any of the above-listed programs.

## E. SPENDING

Categorical expenditures from the above-named resources will be routed through the Monitoring and Accountability Reporting Department for approval. Approval of all expenditures, including PARs, must be obtained prior to the purchase, event, or start date.

### **Instructions for Expending Funds Related to Categorical Budgets:**

For changes in categorical expenditures from those originally allocated in the 2013-2014 SPSA, SSC approval is required and the 2013 - 2014 SPSA must be adjusted to reflect the modifications.

For these expenditures, complete the *Major Categorical Funds—Justification of Expenditure for Budget Transfer 2013-2014* form; once approved, this form delineates modifications to your SPSA. Send the Budget Transfer Justification form (with original signatures of the principal and SSC chairperson), along with SSC meeting minutes verifying SSC approval, to:

**Monitoring and Accountability Reporting Department  
Education Center, Room 3126**

Once approved by the Monitoring and Accountability Reporting Department, the principal and budget analyst will receive an e-mail notification.

### **The following guidelines describe requirements for expending categorical funds:**

1. **Equipment**
  - a. Must be identified in the site plan.
  - b. If not **clearly instructional**, seek guidance in advance from your assigned Resource Teacher in the Monitoring and Accountability Reporting Department.
  - c. No procurement cards.
  - d. No confirming orders (i.e., purchase order created after item is purchased and delivered).
2. **Instructional Materials**
  - a. Must be related to student academic needs, instructional focus, and core curriculum.
  - b. Supplemental to, not instead of, district/state funds.
3. **Non-Instructional Supplies and Expenses**
  - a. Must specifically identify how non-instructional supplies and expenses support student achievement.
  - b. Must specifically identify how administrative costs include postage, office supplies, clerical time, etc., as well as maintenance agreements, and non-classroom equipment support student achievement.
4. **Travel must be pre-approved**
  - a. Submit travel authorization **prior** to trip with justification tied to site plan.
5. **Conferences and/or Consultants (for professional development)**
  - i. Must be related to site plan.

9. **Field Trips**
  - a. Must be part of classroom instructional plan.
  - b. Must be related to core academics.
  - c. Must have appropriate pre- and post-trip activities.
  - d. Must be tied to the SPSA.
10. **Substitutes (for classroom teachers)**
  - a. For professional development.
  - b. For sick leave only for teachers paid from a categorical fund.
11. **Hourly time**
  - a. For professional development.
  - b. Extra time for support of academic programs, when necessary.
  - c. Clerical time beyond the regular school day in support of the academic programs.
12. **Parent Involvement**
  - a. Workshops for parents.
  - b. Materials for parent meetings, training, parent resource library.
  - c. Speakers or consultants for parents.
  - d. Communications with parents (including mailings).
  - e. Light refreshments.
  - f. Childcare for parents to attend workshops.
  - g. Translation for parents attending workshops.

**The following expenses may NOT be funded through categorical programs.**

- a. Noon duty.
- b. Meals.
- c. Athletic equipment.
- d. Medical supplies.
- e. Custodial supplies.
- f. Building improvement.
- g. Replacement of i21 materials. Check with IT Help Desk first for available supplies.
- h. Vice Principals
- i. Clerical Positions
- j. Network Tech
- k. Copier Contract
- l. Community Service Assistant
- m. Campus Security
- n. Nursing and Counseling Time in 70910





## Major Categorical Funds Justification of Expenditure for Budget Transfer and SPSA Modification 2013-2014

**Complete this form for the following change in categorical expenditures allocated in the 2013-14 SPSA:**

- Budget transfer within a categorical resource.  
 Expense transfer between and/or into categorical resources (Budget Transaction Detail Report is required highlighting items to transfer).

**A copy of the SSC meeting minutes showing budget discussion item must be attached.  
 (Minutes include resource, account, and amounts for both “from” and “to” and the description of the  
 resulting benefit to students).**

<b>SCHOOL NAME:</b>	<b>DATE:</b>	<b>LOCATION NUMBER:</b>
<b>BUDGET ANALYST:</b>		
<b>PROPOSED FUNDING SOURCE (Resource Code):</b>		
<b>PAR NUMBER (IF REQUIRED):</b>		
<p><b>DESCRIPTION OF PROPOSED EXPENDITURE: All expenditures should be listed individually</b></p> <p><b>Expenditure and Benefit to Students:</b> <i>How is the money specifically being spent on students and their proficiency level? How will this affect student achievement? Please explain your rationale for compliance for the use of categorical funds.</i></p> <p>A. B. C. D. E. F. G.</p> <p><i>* Please list amount funded for each item on the following budget page.</i></p>		
<p><b>Reason for Transfer:</b></p> <p><input type="checkbox"/> Increase to an activity previously identified in SPSA:  <input type="checkbox"/> Transfer of expenditures due to clerical error:  <input type="checkbox"/> Other (Please specify):</p>		
<b>REQUIRED SPSA MODIFICATION:</b>	<b>Area/Page:</b>	
<p><b>Data used to Justify Expenditure:</b></p> <p><input type="checkbox"/> API    <input type="checkbox"/> AYP    <input type="checkbox"/> CAHSEE    <input type="checkbox"/> CELDT    <input type="checkbox"/> CST    <input type="checkbox"/> Benchmarks  <input type="checkbox"/> Other (Please specify):  <input type="checkbox"/> Other (Please specify):</p>		

<b>FROM:</b>	<b>Dept.</b>	<b>Resource</b>	<b>Budget Ref</b>	<b>Account</b>	<b>Program</b>	<b>Class</b>	<b>Fund</b>	<b>Extended</b>	<b>Amount</b>
A									\$
B									\$
C									\$
D									\$
E									\$
F									\$
G									\$
<b>TOTAL</b>									

<b>To:</b>	<b>Dept.</b>	<b>Resource</b>	<b>Budget Ref</b>	<b>Account</b>	<b>Program</b>	<b>Class</b>	<b>Fund</b>	<b>Extended</b>	<b>Amount</b>
A									\$
B									\$
C									\$
D									\$
E									\$
F									\$
G									\$
<b>TOTAL</b>									

**Site Assurances:**

- Student achievement data and site plan strategies were reviewed and analyzed. Based on our findings, the SSC has approved modifying our Single Plan for Student Achievement (SPSA) and categorical budget.  
\* List date(s) of SSC meeting(s): \_\_\_\_\_
- A copy of the SSC meeting minutes showing plan and budget discussion item is attached, and discussion/approval item is highlighted (Includes resource, account, and amounts).
- A copy of the Detailed Transaction Report is attached and highlighted (expenses only).
- The expense is supplemental to district-provided services.

**Required Signatures:**

*The undersigned declare under penalty of perjury that the foregoing is true and correct and that these assurances were signed in San Diego, California, on the date(s) indicated.*

Principal (Print Name) _____	Date _____	SSC Chairperson (Print Name) _____	Date _____
Principal's Signature _____	Date _____	SSC Chairperson's Signature _____	Date _____

Date Received by MAR department: _____	Reviewed by MAR Resource Teacher: _____
<b>Approved</b> ____ <b>Denied</b> ____	
Comments: _____	
_____	
_____	
Received by Budget Analyst: _____	Date Posted: _____

Attach this form to appropriate documentation **WITH original signatures.**

**Submit all documents to:** Monitoring and Accountability Reporting Department  
Eugene Brucker Education Center  
4100 Normal Street Room 3126  
San Diego, CA 92103-2682

**Retain a copy at your site in the SSC Notebook.**





## Major Categorical Funds Justification of Expenditure for Budget Transfer and SPSA Modification 2013-2014

**Complete this form for the following change in categorical expenditures allocated in the 2013-14 SPSA:**

- Budget transfer within a categorical resource.  
 Expense transfer between and/or into categorical resources (Budget Transaction Detail Report is required highlighting items to transfer).

**A copy of the SSC meeting minutes showing budget discussion item must be attached. (Minutes include resource, account, and amounts for both “from” and “to” and the description of the resulting benefit to students).**

<b>SCHOOL NAME:</b> Future Middle School	<b>DATE:</b> 12-11-2013	<b>LOCATION NUMBER:</b> 2010
<b>BUDGET ANALYST:</b> Smith, John		
<b>PROPOSED FUNDING SOURCE (Resource Code):</b> 70910		
<b>PAR NUMBER (IF REQUIRED):</b>		
<p><b>DESCRIPTION OF PROPOSED EXPENDITURE: All expenditures should be listed individually</b></p> <p><b>Expenditure and Benefit to Students:</b> <i>How is the money specifically being spent on students and their proficiency level? How will this affect student achievement? Please explain your rationale for compliance for the use of categorical funds.</i></p> <p>A. Teacher hourly (1157) to provide after school tutoring for sixth grade English Learner students performing below basic.  B. English Learner Coordinator hourly (2151) to assist with interventions and assessments for English Learners.  C.  D.  E.  F.  G.</p> <p><i>* Please list amount funded for each item on the following budget page.</i></p>		
<p><b>Reason for Transfer:</b></p> <p><input type="checkbox"/> Increase to an activity previously identified in SPSA:  <input type="checkbox"/> Transfer of expenditures due to clerical error:  <input checked="" type="checkbox"/> Other (Please specify): The ELST funded in 70910 was below average salary which was used when developing the budget. This created a surplus of \$10,000 in 70910 (account 1109)</p>		
<b>REQUIRED SPSA MODIFICATION:</b>	<b>Area/Page:</b> Area 3, English Learner	
<p><b>Data used to Justify Expenditure:</b></p> <p><input checked="" type="checkbox"/> API    <input checked="" type="checkbox"/> AYP    <input type="checkbox"/> CAHSEE    <input type="checkbox"/> CELDT    <input type="checkbox"/> CST    <input type="checkbox"/> Benchmarks  <input type="checkbox"/> Other (Please specify):  <input type="checkbox"/> Other (Please specify):</p>		

<b>FROM:</b>	<b>Dept.</b>	<b>Resource</b>	<b>Budget Ref</b>	<b>Account</b>	<b>Program</b>	<b>Class</b>	<b>Fund</b>	<b>Extended</b>	<b>Amount</b>
A	2010	70910	00	1109	4760	1110	01000	0000	\$10,000
B									\$
C									\$
D									\$
E									\$
F									\$
G									\$
<b>TOTAL</b>									<b>\$10,000</b>

<b>To:</b>	<b>Dept.</b>	<b>Resource</b>	<b>Budget Ref</b>	<b>Account</b>	<b>Program</b>	<b>Class</b>	<b>Fund</b>	<b>Extended</b>	<b>Amount</b>
A	2010	70910	00	1157	4760	1110	01000	0000	\$7,000
B	2010	70910	00	2151	4760	1110	01000	0000	\$3,000
C									\$
D									\$
E									\$
F									\$
G									\$
<b>TOTAL</b>									<b>\$10,000</b>



**SAN DIEGO UNIFIED SCHOOL DISTRICT**  
***Future Middle School***  
**SSC Meeting**

**Date: December 11, 2013**

## Meeting Minutes

## Meeting Minutes

Members present:

**Staff**

- Jane Doe, Principal
- John Alford, Teacher
- Melina Escalante, Teacher
- Harriet Nguyen, Teacher
- Sam Marston, Building Supervisor

**Parents/Community Members**

- Sally Chen, Parent/DAC Rep
- George Rivers, Parent
- Patricia Ruiz, Parent
- Cynthia Smith, Parent
- John Ortega, Community Member

Guests: Richard Stone, Leticia Williams

ITEM	DESCRIPTION/ACTIONS	MEETING SUMMARY
1. Call to Order	<ul style="list-style-type: none"> <li>• Sally Chen: SSC Chairperson</li> </ul>	Meeting was called to order at 3:35 p.m.
2. SSC Business <ul style="list-style-type: none"> <li>➤ Approval of Minutes</li> <li>➤ Approval of Bylaws</li> </ul>	<ul style="list-style-type: none"> <li>• Action Item: Approval of minutes for November 13, 2013; Sally Chen, SSC Chairperson.</li> <li>• Action Item: Melina Escalante, Bylaw Committee chair</li> </ul>	<ul style="list-style-type: none"> <li>• Minutes from November 13, 2013 were reviewed. Approval of the minutes moved by Ortega, seconded by Escalante. Motion passed.</li> <li>• The district bylaw sample, which among other changes, removes electronic voting (which is mandatory) was discussed. John Ortega moved to approve the 2013-14 district bylaw sample with appointment by the SSC as our method of filling vacancies during the school year. Motion seconded by George Rivers. Motion passed 8-1.</li> </ul>
3. Data Review <ul style="list-style-type: none"> <li>➤ Benchmark I Results</li> </ul>	<ul style="list-style-type: none"> <li>• Informational: Jane Doe, Principal</li> </ul>	<ul style="list-style-type: none"> <li>• School benchmark reports were distributed to all members analyzed results from multiple perspectives. Additionally, a report was produced analyzing student progress longitudinally over the past 2 years. This will allow us to document progress while we work through the changing curriculum (CCSS).</li> </ul>
4. SPSA <ul style="list-style-type: none"> <li>➤ Monitoring the SPSA</li> <li>➤ Review 2013-14 Goals</li> </ul>	<ul style="list-style-type: none"> <li>• Informational: John Alford, Teacher member</li> <li>• Action Item: Jane Doe, Principal</li> </ul>	<ul style="list-style-type: none"> <li>• John Alford provided all members with an SPSA monitoring form/table. The table links progress with expenditures. The SSC will continue to develop the form over the year to streamline progress monitoring and hopefully support next year's SPSA revisions.</li> <li>• After reviewing Benchmark I data, the SSC discussed adjusting the ELA SMART goal up 2 percentage points since we have already met targets. Sam Marston moved to approve the new SPSA goals for 2013-14. Motion seconded by Patricia Ruiz. Motion passed 9-0.</li> </ul>
<ul style="list-style-type: none"> <li>➤ Budget               <ul style="list-style-type: none"> <li>○ Budget Transfer within 70910</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Action Item: Jane Doe, Principal</li> </ul>	<ul style="list-style-type: none"> <li>➤ Jane confirmed with her Budget Analyst that all the salary transfers</li> </ul>

ITEM	DESCRIPTION/ACTIONS	MEETING SUMMARY
<ul style="list-style-type: none"> <li>○ Expense Transfer from 00000 to 30100</li> </ul>		<p>had been completed for school. The salary for the ELST purchased with 70910 is \$10,000 below district average. We are now able to use these funds. Our priorities were reviewed, and Patricia motioned to use these funds towards priority #2 and #3, after school tutoring and EL Coordinator hourly since there wasn't enough available toward priority #1 – additional .2 FTE librarian.</p> <p><b><u>Budget Transfer 70910</u></b>        From: 2010 70910 00 1109 4760 1110 01000 0000 - \$10,000 (ELST surplus salary)</p> <p>To: 2010 70910 00 1157 4760 1110 01000 0000 - \$7,000 (after school tutoring of sixth grade ELs Below Basic)</p> <p>To: 2010 70910 00 2151 4760 1110 01000 0000 - \$3,000 (EL Coordinator hourly to provide interventions and assessments of EL students)</p> <p>Motion seconded by Harriet. Passed unanimously.</p> <p><b><u>Expense Transfer from 00000 to 30100</u></b>        Five teachers attended professional development for CCSS in the month of October. The charges for these days were incorrectly charged to 00000 (amount \$670). Sally motioned to move these expenses to Title I where there were identified to go in the SPSA.</p> <p>From: 2010 00000 00 1192 1000 1110 01000 0000 (visiting teachers)        To: 2010 30100 00 1192 1000 1110 01000 0000 (visiting teachers)</p> <p>Motion seconded by Harriet. Passed unanimously.</p>
<p>5. DAC and ELAC</p> <ul style="list-style-type: none"> <li>➤ DAC Report</li>     <li>➤ ELAC Report</li> </ul>	<ul style="list-style-type: none"> <li>• Informational: Sally Chen, DAC Representative</li>     <li>• Informational: Melina Escalante, ELAC Chairperson</li> </ul>	<ul style="list-style-type: none"> <li>• DAC: Sally Chen reported the DAC New Member Orientation is scheduled for 12/13 @ 4:30 PM. The Title I Ranking Report was shared at the November DAC meeting and was distributed. Currently our school has 40% free and reduced lunch and therefore receives Title I funding. The report identifies the scaled funding for all schools in the district.</li> <li>• DELAC: Melina Escalante shared information from the September 2013 meeting.</li> </ul>
<p>6. Public Comment</p>		<p>There was no public comment.</p>





## Major Categorical Funds Justification of Expenditure for Budget Transfer and SPSA Modification 2013-2014

**Complete this form for the following change in categorical expenditures allocated in the 2013-14 SPSA:**

- Budget transfer within a categorical resource.  
 Expense transfer between and/or into categorical resources (Budget Transaction Detail Report is required highlighting items to transfer).

**A copy of the SSC meeting minutes showing budget discussion item must be attached. (Minutes include resource, account, and amounts for both "from" and "to" and the description of the resulting benefit to students).**

<b>SCHOOL NAME:</b> Future Middle School	<b>DATE:</b> 12-11-2013	<b>LOCATION NUMBER:</b> 2010
<b>BUDGET ANALYST:</b> Smith, John		
<b>PROPOSED FUNDING SOURCE (Resource Code):</b> 30100		
<b>PAR NUMBER (IF REQUIRED):</b>		
<p><b>DESCRIPTION OF PROPOSED EXPENDITURE: All expenditures should be listed individually</b></p> <p><b>Expenditure and Benefit to Students:</b> <i>How is the money specifically being spent on students and their proficiency level? How will this affect student achievement? Please explain your rationale for compliance for the use of categorical funds.</i></p> <p>A. First grade teachers attended Common Core State Standards in order to learn how to use current curriculum to provide more project-based hands-on learning.</p> <p>B.</p> <p>C.</p> <p>D.</p> <p>E.</p> <p>F.</p> <p>G.</p> <p><i>* Please list amount funded for each item on the following budget page.</i></p>		
<p><b>Reason for Transfer:</b></p> <p><input type="checkbox"/> Increase to an activity previously identified in SPSA:</p> <p><input checked="" type="checkbox"/> Transfer of expenditures due to clerical error: Incorrectly charged to 00000.</p> <p><input type="checkbox"/> Other (Please specify):</p>		
<b>REQUIRED SPSA MODIFICATION:</b>	<b>Area/Page:</b> Area 3, English Learner	
<p><b>Data used to Justify Expenditure:</b></p> <p><input checked="" type="checkbox"/> API    <input checked="" type="checkbox"/> AYP    <input type="checkbox"/> CAHSEE    <input type="checkbox"/> CELDT    <input type="checkbox"/> CST    <input type="checkbox"/> Benchmarks</p> <p><input type="checkbox"/> Other (Please specify):</p> <p><input type="checkbox"/> Other (Please specify):</p>		

<b>FROM:</b>	<b>Dept.</b>	<b>Resource</b>	<b>Budget Ref</b>	<b>Account</b>	<b>Program</b>	<b>Class</b>	<b>Fund</b>	<b>Extended</b>	<b>Amount</b>
A	2010	00000	00	1192	1000	1110	01000	0000	\$670
B									\$
C									\$
D									\$
E									\$
F									\$
G									\$
<b>TOTAL</b>									<b>\$670</b>

<b>To:</b>	<b>Dept.</b>	<b>Resource</b>	<b>Budget Ref</b>	<b>Account</b>	<b>Program</b>	<b>Class</b>	<b>Fund</b>	<b>Extended</b>	<b>Amount</b>
A	2010	30100	00	1192	1000	1110	01000	0000	\$670
B									\$
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D									\$
E									\$
F									\$
G									\$
<b>TOTAL</b>									<b>\$670</b>

**Site Assurances:**

- Student achievement data and site plan strategies were reviewed and analyzed. Based on our findings, the SSC has approved modifying our Single Plan for Student Achievement (SPSA) and categorical budget.  
\* List date(s) of SSC meeting(s): December 11, 2013
- A copy of the SSC meeting minutes showing plan and budget discussion item is attached, and discussion/approval item is highlighted (Includes resource, account, and amounts).
- A copy of the Detailed Transaction Report is attached and highlighted (expenses only).
- The expense is supplemental to district-provided services.

**Required Signatures:**

*The undersigned declare under penalty of perjury that the foregoing is true and correct and that these assurances were signed in San Diego, California, on the date(s) indicated.*

<u>Jane Doe</u> _____	<u>12/11/2013</u> _____	<u>Sally Chen</u> _____	<u>12/11/2013</u> _____
Principal (Print Name)	Date	SSC Chairperson (Print Name)	Date
<u>Jane Doe (Original signature needed)</u> _____	<u>12/11/2013</u> _____	<u>Sally Chen (Original signature needed)</u> _____	<u>12/11/2013</u> _____
Principal's Signature	Date	SSC Chairperson's Signature	Date

Date Received by MAR department: _____	Reviewed by MAR Resource Teacher: _____
<b>Approved</b> ____ <b>Denied</b> ____	
Comments: _____ _____ _____	
Received by Budget Analyst: _____	Date Posted: _____

Attach this form to appropriate documentation **WITH original signatures.**

**Submit all documents to:** Monitoring and Accountability Reporting Department  
Eugene Brucker Education Center  
4100 Normal Street Room 3126  
San Diego, CA 92103-2682

**Retain a copy at your site in the SSC Notebook.**



## SAN DIEGO UNIFIED SCHOOL DISTRICT

*Future Middle School*  
SSC Meeting

Date: December 11, 2013

## Meeting Minutes

## Meeting Minutes

Members present:

Staff

- Jane Doe, Principal
- John Alford, Teacher
- Melina Escalante, Teacher
- Harriet Nguyen, Teacher
- Sam Marston, Building Supervisor

Parents/Community Members

- Sally Chen, Parent/DAC Rep
- George Rivers, Parent
- Patricia Ruiz, Parent
- Cynthia Smith, Parent
- John Ortega, Community Member

Guests: Richard Stone, Leticia Williams

ITEM	DESCRIPTION/ACTIONS	MEETING SUMMARY
1. Call to Order	<ul style="list-style-type: none"> <li>• Sally Chen: SSC Chairperson</li> </ul>	Meeting was called to order at 3:35 p.m.
2. SSC Business <ul style="list-style-type: none"> <li>➤ Approval of Minutes</li> <li>➤ Approval of Bylaws</li> </ul>	<ul style="list-style-type: none"> <li>• Action Item: Approval of minutes for November 13, 2013; Sally Chen, SSC Chairperson.</li> <li>• Action Item: Melina Escalante, Bylaw Committee chair</li> </ul>	<ul style="list-style-type: none"> <li>• Minutes from November 13, 2013 were reviewed. Approval of the minutes moved by Ortega, seconded by Escalante. Motion passed.</li> <li>• The district bylaw sample, which among other changes, removes electronic voting (which is mandatory) was discussed. John Ortega moved to approve the 2013-14 district bylaw sample with appointment by the SSC as our method of filling vacancies during the school year. Motion seconded by George Rivers. Motion passed 8-1.</li> </ul>
3. Data Review <ul style="list-style-type: none"> <li>➤ Benchmark I Results</li> </ul>	<ul style="list-style-type: none"> <li>• Informational: Jane Doe, Principal</li> </ul>	<ul style="list-style-type: none"> <li>• School benchmark reports were distributed to all members analyzed results from multiple perspectives. Additionally, a report was produced analyzing student progress longitudinally over the past 2 years. This will allow us to document progress while we work through the changing curriculum (CCSS).</li> </ul>
4. SPSA <ul style="list-style-type: none"> <li>➤ Monitoring the SPSA</li> <li>➤ Review 2013-14 Goals</li> </ul>	<ul style="list-style-type: none"> <li>• Informational: John Alford, Teacher member</li> <li>• Action Item: Jane Doe, Principal</li> </ul>	<ul style="list-style-type: none"> <li>• John Alford provided all members with an SPSA monitoring form/table. The table links progress with expenditures. The SSC will continue to develop the form over the year to streamline progress monitoring and hopefully support next year's SPSA revisions.</li> <li>• After reviewing Benchmark I data, the SSC discussed adjusting the ELA SMART goal up 2 percentage points since we have already met targets. Sam Marston moved to approve the new SPSA goals for 2013-14. Motion seconded by Patricia Ruiz. Motion passed 9-0.</li> </ul>

ITEM	DESCRIPTION/ACTIONS	MEETING SUMMARY
<ul style="list-style-type: none"> <li>➤ Budget               <ul style="list-style-type: none"> <li>○ Budget Transfer within 70910</li> <li>○ Expense Transfer from 00000 to 30100</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Action Item: Jane Doe, Principal</li> </ul>	<ul style="list-style-type: none"> <li>➤ Jane confirmed with her Budget Analyst that all the salary transfers had been completed for school. The salary for the ELST purchased with 70910 is \$10,000 below district average. We are now able to use these funds. Our priorities were reviewed, and Patricia motioned to use these funds towards priority #2 and #3, after school tutoring and EL Coordinator hourly since there wasn't enough available toward priority #1 – additional .2 FTE librarian.</li> <li><b><u>Budget Transfer70910</u></b>            From: 2010 70910 00 1109 4760 1110 01000 0000 - \$10,000 (ELST surplus salary)</li> <li>To: 2010 70910 00 1157 4760 1110 01000 0000 - \$7,000 (after school tutoring of sixth grade ELs Below Basic)</li> <li>To: 2010 70910 00 2151 4760 1110 01000 0000 - \$3,000 (EL Coordinator hourly to provide interventions and assessments of EL students)</li> <li>Motion seconded by Harriet. Passed unanimously.</li> <li><b><u>Expense Transfer from 00000 to 30100</u></b>            Five teachers attended professional development for CCSS in the month of October. The charges for these days were incorrectly charged to 00000 (amount \$670). Sally motioned to move these expenses to Title I where there were identified to go in the SPSA.</li> <li>From: 2010 00000 00 1192 1000 1110 01000 0000 (visiting teachers)</li> <li>To: 2010 30100 00 1192 1000 1110 01000 0000 (visiting teachers)</li> <li>Motion seconded by Harriet. Passed unanimously.</li> </ul>
5. DAC and ELAC <ul style="list-style-type: none"> <li>➤ DAC Report</li> <li>➤ ELAC Report</li> </ul>	<ul style="list-style-type: none"> <li>• Informational: Sally Chen, DAC Representative</li> <li>• Informational: Melina Escalante, ELAC Chairperson</li> </ul>	<ul style="list-style-type: none"> <li>• DAC: Sally Chen reported the DAC New Member Orientation is scheduled for 12/13 @ 4:30 PM. The Title I Ranking Report was shared at the November DAC meeting and was distributed. Currently our school has 40% free and reduced lunch and therefore receives Title I funding. The report identifies the scaled funding for all schools in the district.</li> <li>• DELAC: Melina Escalante shared information from the September 2013 meeting.</li> </ul>
6. Public Comment		There was no public comment.

SAN DIEGO UNIFIED SCHOOL DISTRICT  
*Future Middle School*  
SSC Meeting

Date: December 11, 2013

Meeting Minutes

Meeting Minutes

Members present:

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- Jane Doe, Principal
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<p>6. Public Comment</p>		<p>There was no public comment.</p>

Meeting Adjourned at 4:35 p.m.  
Minutes recorded by Jane Dawes, Clerical Staff Member

## CATEGORICAL SPENDING GUIDELINES 2013-14

All categorical budgets **MUST** be for direct services that impact student achievement. **Students must be considered first.** You must be able to answer the questions:

- Are these expenditures based on what is good for students at our school, not what is good for the adults?
- Do these expenditures provide supplementary services that would not be provided absent categorical funds?
- Do position allocations for categorical funds match the proportion of each position actually performing direct, supplementary services to students?
- Do these expenditures directly affect each student in progressing to proficiency on the state standards?
- Does this categorical funding allocation help us reach our SMART goals?

**RATIONALES FOR CATEGORICAL SPENDING MUST BE CLEARLY DESCRIBED IN THE SPSA.**



**CATEGORICAL SPENDING GUIDELINES 2013-14**

Resource #	Resource Name	Allowable Expenses	Non-allowable Expenses
30100	Title I Basic	<ul style="list-style-type: none"> <li>● <b>Required:</b> Program Improvement schools must allocate 10% of Title I funds for Professional Development.</li> <li>● Equipment</li> <li>● Instructional Materials</li> <li>● Non-Instructional Supplies and Expenses to support supplemental services/programs for students</li> <li>● Travel (must be pre-approved)</li> <li>● Conferences for professional development</li> <li>● Field Trips (in support of standards-based instruction)</li> <li>● Substitutes (for classroom teachers)</li> <li>● Hourly time (classroom teachers and classified staff working directly in supplemental services/programs for students )</li> <li>● ELST</li> <li>● AVID teachers and tutors</li> <li>● CSR teachers</li> <li>● Parent Involvement</li> <li>● Extended Day/Year Programs</li> <li>● Nursing time, including Health Tech</li> <li>● Counseling time</li> <li>● Librarian time</li> <li>● Push-in teacher</li> <li>● Subject-specific resource teachers</li> <li>● Reading teacher</li> <li>● CAHSEE prep teacher</li> <li>● Classroom teachers who provide <b>qualitatively different instruction to underperforming students</b></li> <li>● Parent Academic Liaison</li> <li>● Assistants (guidance, classroom, library, etc.) <b>IF working directly with students on intervention programs or activities—MUST be clearly articulated in SPSA</b></li> </ul>	<ul style="list-style-type: none"> <li>● Vice Principals</li> <li>● Clerical positions</li> <li>● Network Tech-unless working <b>directly</b> with students on intervention programs/activities</li> <li>● Copier contract</li> <li>● Community Service assistant</li> <li>● Campus security</li> <li>● Noon Duty</li> <li>● Meals</li> <li>● Athletic equipment</li> <li>● Medical supplies</li> <li>● Custodial supplies</li> <li>● Building improvement</li> </ul>

**CATEGORICAL SPENDING GUIDELINES 2013-14**

Resource #	Resource Name	Allowable Expenses	Non-allowable Expenses
30103	Title I Parent Involvement	<ul style="list-style-type: none"> <li>Materials for parent meetings and training</li> <li>Conferences and workshops for parents</li> <li>Communications with parents</li> <li>Light refreshments</li> </ul>	<ul style="list-style-type: none"> <li>Copier contract</li> <li>Same as for Title I Basic</li> </ul>
30106	Title I Program Improvement Supplemental <b>(PI schools in Years 4 &amp; 5 only)</b>	<ul style="list-style-type: none"> <li>Same as for Title I Basic</li> <li><b>Required</b> to set aside 10% of allocation for staff professional development</li> <li>Expenditures must be directly related to addressing student achievement in English Language Arts and/or Mathematics</li> </ul>	<ul style="list-style-type: none"> <li>Same as for Title I Basic</li> </ul>
70900	Economic Impact Aid/State Compensatory Education (EIA/SCE)	<ul style="list-style-type: none"> <li>See Title I Basic</li> </ul>	<ul style="list-style-type: none"> <li>Same as for Title I Basic</li> </ul>
70910	Economic Impact Aid/Limited English Proficient (EIA/LEP)	<ul style="list-style-type: none"> <li>ELST</li> <li>Supplemental materials, services, and expenses directly related to language development</li> <li>Student assessment and monitoring—CELDT</li> <li>Classified positions that directly support ELs</li> <li>Professional development</li> </ul>	<ul style="list-style-type: none"> <li>Nursing and Counseling Time</li> <li>Same as for Title I Basic</li> </ul>
74000	Quality Education Investment Act (QEIA)	<ul style="list-style-type: none"> <li>QEIA requirements</li> </ul>	

**Office of Accountability  
Monitoring and Accountability Reporting Department  
Vikki Henton, Program Manager**

**2013-14**

**CONTACT INFORMATION**

STAFF ASSIGNMENTS	SCHOOL ASSIGNMENTS
<p align="center">Dario Gutierrez (619) 725-7785 Email : <a href="mailto:dgutierrez2@sandi.net">dgutierrez2@sandi.net</a></p>	<p>All Schools listed in: Areas 1, and 2 Home/Hospital, Riley, TRACE, and Whittier</p>
<p align="center">Mary Johnson (619) 725-5611 Email: <a href="mailto:mjohnson8@sandi.net">mjohnson8@sandi.net</a></p>	<p>All Schools listed in: Areas 4, and 5</p>
<p align="center">Dr. Susan JK Weinshanker (619) 725-5614 Email: <a href="mailto:sweinshanker@sandi.net">sweinshanker@sandi.net</a></p>	<p>All Schools listed in: Areas 3, and 6</p>

**Eugene Brucker Education Center  
4100 Normal Street, Room 3126**

Telephone: (619) 725-5609

Fax: (619) 725-7055

Additional resources and information can be found at the  
Monitoring and Accountability Reporting Department website

<http://www.sandi.net/Page/37313>