

# Title 1: Resources 30100-30106



**Major Categorical Funds  
Justification of Expenditure for Budget/Expense Transfer  
and SPSA Modification  
2018-19**

Complete this form for the following change in categorical expenditures allocated in the 2018-19 SPSA:

- BUDGET** transfer within a categorical resource.
- EXPENSE** transfer between and/or into categorical resources. **Budget Transaction Detail Report or Actuals Query is required highlighting items to transfer.**

**A copy of the SSC meeting minutes showing budget discussion item must be attached.**

(Minutes must 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> 11/10/2018	<b>Location Number:</b> 2018A
<b>Analyst:</b> Smith, John 619-555-5555		<b>Resource Teacher:</b> Smith, Jane 619-555-5556
<b>Proposed Funding Resource:</b>	30100	
<b>PAR Number (If Required):</b>		

**Description of Proposed Expenditure: All expenditures should be listed individually**

**Expenditure and Benefit to Students and/or Parent Involvement:** *How is the money specifically being spent on students? How will this affect student achievement? Please explain your rationale for compliance for the use of categorical funds.*

	Focus Area	Account	Rationale
<i>Example</i>	<i>Closing the Gap</i>	1157	After school math tutoring for upper grade students identified by teachers using current math assessments.
A.	<i>Professional Development</i>	1192	First grade teachers attended a Common Core PD at the San Diego County Office of Education in order to learn how to use the current curriculum to provide more hands on learning.
B.			
C.			
D.			
E.			
F.			
G.			

*\* Please list amount funded for each item on the following budget page.*

**Reason for Transfer:**

- Increase to an activity previously identified in SPSA:
- Transfer of expenditures due to clerical error:
- Other (Please specify):

**Required SPSA Modification:** None required - Expenditure already in SPSA

**Data used to Justify Expenditure:**

- CAASP       ELPAC       Other (Please Specify)
- DRA2       Benchmarks

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FROM:	Dept.	Resource	Budget Ref	Account	Program	Class	Fund	Extended	Amount	Description	
<b>Example</b>	0001	30100	00	5735	1000	1110	01000	0000	<del>2,500.00</del>	<i>Interprogram Sves/Field Trip</i>	
A.	2018A	00000	00	1192	1000	1110	01000	0000	\$ 612.85	<i>Prof&amp;Curriclm Dev Vist Tchr</i>	
B.	2018A		00				01000	0000	\$		
C.	2018A		00				01000	0000	\$		
D.	2018A		00				01000	0000	\$		
E.	2018A		00				01000	0000	\$		
F.	2018A		00				01000	0000	\$		
G.	2018A		00				01000	0000	\$		
									Total	\$ 612.85	

TO:	Dept.	Resource	Budget Ref	Account	Program	Class	Fund	Extended	Amount	Description	
<b>Example</b>	0001	30100	00	1157	1000	1110	01000	0000	<del>2,500.00</del>	<i>Classroom Teacher Hrly</i>	
A.	2018A	30100	00	1192	1000	1110	01000	0000	\$ 612.85	<i>Prof&amp;Curriclm Dev Vist Tchr</i>	
B.	2018A		00			110	01000	0000	\$		
C.	2018A		00				01000	0000	\$		
D.	2018A		00				01000	0000	\$		
E.	2018A		00				01000	0000	\$		
F.	2018A		00				01000	0000	\$		
G.	2018A		00				01000	0000	\$		
									Total	\$ 612.85	

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**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): 11/10/2018
- 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 or actuals query (expense transfers only).
- The expense(s) is/are 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>11/10/2018</u>
Principal (Print Name)	Date

<u>Sally Chen</u>	<u>11/10/2018</u>
SSC Chairperson (Print Name)	Date


<u>Jane Doe</u>	<u>11/10/2018</u>
Principal's Signature	Date

<u>Sally Chen</u>	<u>11/10/2018</u>
SSC Chairperson's Signature	Date

_____	_____
Date Received by FPMA Department	Reviewed by FPMA Resource Teacher
<b>Approved</b> _____ <b>Denied</b> _____	
Comments: _____   	
Received by Analyst: _____	Date Posted: _____

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

**Submit all documents to:** Financial Planning, Monitoring and Accountability Department  
 Eugene Brucker Education Center  
 4100 Normal Street, Room 3209  
 San Diego, CA 92103-2682



**Retain a copy at your site in the SSC Notebook once transfer is approved**

Attachment 4 - Sample  
Expense Transfer - Payroll Query

Reference	Name	ID	Empl Record	Pay Period End	Run Date	Off Cycle	Dept ID	Resource	Budget Ref	Acct	Program	Amount
01234567	Substitute, John	00000A	0	10/1/2018	10/6/2018	Y	2018	00000	00	1192	1000	144.20
<b>Substitute, John Total</b>												<b>144.20</b>
01234568	Substitute, Jane	00000B	0	10/1/2018	10/6/2018	Y	2018	00000	00	1192	1000	36.05
<b>Substitutute, Jane</b>												<b>36.05</b>
01234569	Substitute, Ben	00000C	1	10/1/2018	10/6/2018	N	2018	00000	00	1192	1000	144.20
<b>Substitute, Ben Total</b>												<b>144.20</b>
01234560	Substitute, Shelly	00000D	0	9/1/2018	9/6/2018	Y	2018	00000	00	1192	1000	144.20
01234561	Substitute, Shelly	00000D	0	10/1/2018	10/1/2018	N	2018	00000	00	1192	1000	144.20
<b>Grand Total</b>												<b>612.85</b>



# SAMPLE Meeting Minutes

San Diego Unified School District

Attachment 5 – Sample  
SSC Meeting Minutes

## Future Middle School SSC Meeting November 10, 2018

**MEMBERS PRESENT:**

- |  |                                  |   |  |
|--|----------------------------------|---|--|
| <input checked="" type="checkbox"/> Jane Doe       | Principal (ex officio)           | <input checked="" type="checkbox"/> Sally Chen        | <input checked="" type="checkbox"/> Quorum was met |
| <input checked="" type="checkbox"/> John Alford    | Classroom Teacher (2017-2019)    | <input checked="" type="checkbox"/> Sally Dearest     | Parent/DAC Rep (2017-19)                           |
| <input checked="" type="checkbox"/> John Deer      | Classroom Teacher (2018-19)      | <input checked="" type="checkbox"/> Patricia District | Parent (2018-2020)                                 |
| <input checked="" type="checkbox"/> Harriet Nguyen | Classroom Teacher (2017-2019)    | <input type="checkbox"/> Cynthia Smith                | Parent (2018-2020)                                 |
| <input checked="" type="checkbox"/> Sam Potter     | Other School Personnel (2018-20) | <input checked="" type="checkbox"/> John Ortega       | Community Member (2017-2019)                       |

**Guest Name:** Richard Stone, Leticia Williams, and Scooby Doo

Item	Description/Actions	Meeting Summary
1. Call to Order	Sally Chen: SSC Chair	Meeting was called to order at 3:35
2. Public Comment	Open	There was no public comment
3. SSC Business		
a. Approval of Minutes	Action Item: Approval of minutes for October 12, 2018; Sally Dearest, SSC Chairperson.	Minutes from October 12, 2018 were reviewed. Approval of the minutes moved by Dearest, seconded by Deer. Motion passed 9-0.
b. Approval of Bylaws	Action Item: Sally Dearest, Bylaws Committee chair	The district bylaw sample, which among other changes, removes electronic voting was discussed. Sally Dearest moved to approve the 2018-19 district bylaw samples with appointment by the SSC as our method of filling vacancies during the school year. Motion seconded by Sam Potter. Motion passed 8-1.
4. Data Review		
a. Assessment Data Results	Informational: Jane Doe, Principal	School data 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.
5. SPSA		
a. Monitoring the SPSA	Informational: John Alford, Classroom Teacher member	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.

Item	Description/Actions	Meeting Summary
b. Review 2018-19 Goals	Action Item: Jane Doe, Principal	After reviewing student data, the SSC discussed increasing the ELA SMART goal by 5 percentage points since we have already met targets. Sam Potter moved to approve the new SPSA goals for 2018-19. Moved by Dearest. Motion seconded by Patricia District. Motion passed 9-0.
6. Budget a. Budget Transfer within Title I (Resource 30100)  b. Expense Transfer from 00000 to 30100	Action Item: Jane Doe, Principal  Action Item: Jane Doe, Principal	<p><u>Budget Transfer within Resource 30100</u>  <b>From:</b> 30100 00 1109 1000 1110 01000 0000          \$10,000 - IRT surplus salary.</p> <p><b>To:</b> 30100 00 1157 1000 1110 01000 0000          \$7,000 - After-school tutoring of sixth grade students performing below grade level in ELA.</p> <p><b>To:</b> 30100 00 4301 1000 1110 01000 0000          \$3,000 – Supplemental intervention curriculum for primary grades in ELA.          Moved by Chen. Seconded by Ortega. Motion Passed 8-1.</p> <p><u>Expense Transfer from 00000 to 30100</u>          Five teachers attended professional development for CCSS in the month of October. The charges for these days were incorrectly charged to 00000 (in the amount of \$612.85). Sally motioned to move these expenses to Title I where they were identified to be expensed in the SPSA.</p> <p><b>From:</b> 2015 00000 00 1192 1000 1110 01000 0000          \$612.85 - visiting teachers</p> <p><b>To:</b> 2015 30100 00 1192 1000 1110 01000 0000          \$612.85 - visiting teachers          Motion by Chen. Seconded by Ortega. Motion Passed 9-0.</p>
7. DAC and ELAC a. DAC Report  b. ELAC Report	Informational: Sally Chen, DAC Representative  Informational: Melinda Deer, ELAC Chairperson	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.

Item	Description/Actions	Meeting Summary
		DELAC: Melinda Deer shared information from the October 2018 meeting.

**Meeting Adjourned at 4:35 p.m.**

**Minutes recorded by Jane Dawes, Clerical staff member**

SAMPLE