



San Diego Unified School District
Financial Planning and Development
Financial Planning, Monitoring and Accountability Department

**MAJOR CATEGORICAL (TITLE I) FUNDS
EXPENDITURE GUIDELINES 2017-18**

A. FUNDS INCLUDED:

Resource Code 30100	Basic Program Title I/Part A	Part of the Elementary and Secondary Education Act, which provides federal money to support economically disadvantaged students and close academic achievement gaps.
Resource Code 30103	Title I Parent Involvement	Used to encourage parent involvement in order to improve student achievement.
Resource Code 30106	Title I 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. 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 is 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.
3. **Supplement**, not supplant the district's general program. Use of Title I funds must not replace district funds. Title I funds must add to or enhance district program.
4. Foster new types of parent partnerships that focus on improving student achievement.

C. PROCESS:

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 use of the associated Title I budget allocations.

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 needs assessment is a required component of the SWP and the SPSA serves as the Title I Schoolwide Plan.

D. BUDGET:

1. Each school develops a budget to implement all strategies for each available funding source. It includes 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 embedded Title I budget is approved by the Board of Education.
2. The SSC must approve transfers of allocations within any of the above-listed programs.

E. SPENDING:

Expenditures from the Title I resources are routed through and reviewed by the Financial Planning, Monitoring and Accountability Department for approval.

Spending Instructions for Title I Budgets:

SSC approval is required for revisions to Title I expenditures originally allocated in the SPSA. The Title I Justification of Expenditure and SPSA Addendum document these changes and must be kept with the SPSA.

Complete the Title I Justification of Expenditure and SPSA Addendum in order to make revisions to Title I spending. Send the Title I Justification of Expenditure and SPSA Addendum with original principal and SSC chairperson signatures along with SSC meeting minutes verifying SSC approval.

Send to:

**Financial Planning, Monitoring and Accountability Department
Education Center, Room 3209**

The Financial Planning, Monitoring and Accountability (FPMA) resource teacher notifies the principal and budget analyst via an email upon approval of the expense/budget transfers.

TITLE I FUND REQUIREMENTS AND RESTRICTIONS EXPLAINED:

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 centered on our student needs?
- Do these expenditures provide services that would not be provided absent categorical funding?
- Do these expenditures directly affect each student in progressing to proficiency on the Common Core State Standards?
- Does this categorical funding allocation help us reach our area goals?
- Is this activity reflected in our Single Plan for Student Achievement?

SPECIFIC SPENDING PROCESSES AND REQUIREMENTS:

1. Equipment

- a. General type of equipment and intended use/benefit must be identified in the site plan.
- b. If not **clearly instructional**, seek guidance in advance from your assigned Financial Planning, Monitoring and Accountability Department Resource Teacher (**Attachment 5**).
- 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. Must not replace district funded materials and instruction.

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 such as postage, office supplies, clerical time, etc., as well as maintenance agreements, and non-classroom equipment support student achievement.

4. Conferences and/or Consultants (for professional development)

- a. Must be related to site plan.

6. 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.

7. Substitutes (for classroom teachers)

- a. For professional development.
- b. To provide leave for teachers paid from the same funding source.

8. Hourly time

- a. For professional development.
- b. Extra time for support of academic programs.
- c. Clerical time beyond the regular school day in support of academic programs.

9. 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 only.
 - Meals are **NOT** allowable.
- f. Childcare for parents to attend workshops.
- g. Translation for parents attending workshops.
- h. Equipment and supplies for parent room.

Reminder: Title I funds are never used to fund expenses/services provided by the District for the core program or that are otherwise funded through other specific District initiatives or grants.

2017-18
CATEGORICAL SPENDING GUIDELINES

Rationales for Categorical Spending must be clearly described in the Single Plan for Student Achievement (SPSA).

Resource #	Resource Name	Allowable Expenses
30100	Title I Basic	<ul style="list-style-type: none"> ● Equipment –directly related to support student achievement in the Common Core State Standards. ● Instructional Materials ● Travel for professional development (must be pre-approved). ● Conferences for professional development. ● Field Trips (in support of common core instruction). ● Substitutes to provide release time for professional development (for classroom teachers). ● Parent Involvement ● Additional FTE above district allocation including: <ul style="list-style-type: none"> - Nurse - Counselor - Avid teachers and tutors - Class size reduction teachers - Push-in Instruction teacher - Subject-specific resource teachers - Classroom teachers who provide qualitatively different instruction to underperforming students. - Prep teachers (only if used to release teachers for professional development). - Parent Academic Liaison
30100	Title I Basic	<ul style="list-style-type: none"> ● Hourly time including: <ul style="list-style-type: none"> - Classroom teachers and classified staff working directly in supplemental services and/or programs for students Nursing Time - Counselor Time ● Pupil Advocate ● Assistants (guidance, classroom, library, etc.) ● If working directly with students on intervention programs or activities. <p>This MUST be clearly articulated in the SPSA.</p>

Resource #	Resource Name	Allowable Expenses
30103	Title I Parent Involvement	<ul style="list-style-type: none"> • Materials for parent meetings and training • Conferences and workshops for parents • Parent communication materials • Light refreshments (meals are not allowable).
30106	Title I Program Improvement Supplemental (PI schools in Years 4 & 5 only)	<ul style="list-style-type: none"> • <i>Same as for Title I Basic</i> • Expenditures must be directly related to meeting the goals in the school's Program Improvement plan.