SITE BASED BUDGET GUIDE

FOR SCHOOL SITE BALANCED SCORECARD DEVELOPMENT

(Including Suggestions, Examples and Exemplars for BSC Addendum)

Revised February 2015
We are very pleased to present you with this Balanced Score Card (BSC) Site-Based Budget Development Guide, which will be an important resource during your planning process for next school year. As you move forward, we urge you to build on past successes, make the planning process an inclusive discussion among your school community, and keep focused on meeting the differentiated needs of your students.

For a second year, sites will continue to see several changes stemming from California’s new K-12 education funding framework, the Local Control Funding Formula (LCFF), and its accompanying accountability tool, the Local Control Accountability Plan (LCAP). The State’s adoption of LCFF includes several shifts that affects site level planning in SFUSD, such as phasing out certain resources, adding or renaming others, and aligning funding to differences in students’ needs. Many of these modifications are described in this Guide, and we look forward to assisting all school sites in understanding key elements of this transition.

As in prior years, you should expect the following of the BSC Planning process:

- A focus on the role of the School Site Council in designing a BSC and budget for each school;
- The use of a single BSC template to assist you in developing a BSC and budget that effectively guide decision-making and schoolwork to meet the needs of all your students;
- Continued implementation of the Weighted Student Formula (WSF), through which schools are allocated local resources in dollars rather than positions; and,
- Support from the central office, with leadership from your assistant superintendents.
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Balanced Score Card Planning and Site-Based Budgeting Process for 2015-2016

This section contains general information about the 2015-2016 Balanced Score Card Planning and site-based budgeting process. The intent of this section is to make clear the programmatic and staffing requirements for schools, as well as guidelines for decision-making as schools undertake the process.

Included here are:

- Overview: Balanced Score Card Planning and Site-Based Budgeting Development
- Key Components: Balanced Score Card Planning and Site-Based Budgeting Process
- Timeline: Balanced Score Card Planning and Site-Based Budgeting Process
- Task List: Managing the Planning and Budgeting Process
- Decision-Making Guidelines
- Dispute Resolution Process
- District Technical Assistance Team
- Web Resources
Overview: Balanced Score Card Planning and Site-Based Budget Development

2/23: Budget Templates Sent to Schools
Feb 23 – Feb 27

3/7: School Planning Retreat
Mar 2 – Mar 6

Mar 9 – Mar 13
Mar 16 – Mar 20
Mar 23 – Mar 27

3/27: Budget and BSC DUE

Budget Planning
GATHER INFORMATION
- Review current Balanced Score Card
- Review current year progress
- Plan dates and times for community input
- Review Site Allocation and accompanying documents

DEVELOP DRAFT BALANCED SCORE CARD
- Identify needs from student data
- Identify activities that support goals and flow from student needs
- Identify key priorities

SUBMIT BSC
- Complete last draft for SSC review
- SSC signatures
- Submit to District

Budget Development
DEVELOP DRAFT BUDGET
- Determine budget priorities that align with BSC priorities

SUBMIT BUDGET
- Complete draft for SSC review
- SSC signatures
- Submit to District

Community Outreach
SEEK INPUT
- Hold community meetings
- Refine ideas from staff & families

SHARE PRELIMINARY PLAN
- Share plan with faculty & families
<table>
<thead>
<tr>
<th>Component</th>
<th>District</th>
<th>School Site Council (including Principal)</th>
<th>Principal (Additional Responsibilities)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balanced Score Card (BSC)</td>
<td>Set the overarching goals Create/distribute the BSC-SPSA template</td>
<td>Analyze student data/instructional success Gather community input</td>
<td>Draft the Balanced Score Card Implement, monitor, and report progress on the BSC measures at every SSC meeting</td>
</tr>
<tr>
<td></td>
<td>Provide guidelines, monitor implementation, and clarify state/federal legal compliance</td>
<td>Refine the Balanced Score Card Monitor implementation and BSC progress</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Ensure necessary steps to implement District and SSC budgetary priorities (e.g. writing requisitions, monitoring contractors, etc.)</td>
</tr>
<tr>
<td>Budget</td>
<td>Provide schools with budget allocations Create/distribute the site budgeting template</td>
<td>Prioritize funding for academic needs Identify priorities for additional programs (if funds become available) and priorities for cuts (if reductions are necessary)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Provide equitable services to sites Train and aid SSCs and principals on budget</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plan and Budget Review</td>
<td>Review plans for quality, legal compliance, and consistency with District goals Make recommendations, as needed Ensure easy access for each school’s BSC and site budget information</td>
<td>Annually approve Balanced Score Card and site budget (categorical funding) Approve any substantive changes to the Balanced Score Card or categorical funds Incorporate feedback from District</td>
<td>Consult with District reviewers Communicate feedback from District reviewers to the SSC Facilitate any necessary revisions Submit revised plan for final approval</td>
</tr>
<tr>
<td></td>
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</tr>
<tr>
<td>Curriculum, Instruction, and Professional Development</td>
<td>Produce common core standards-based curriculum and instructional guides Recommend common core standards-based academic intervention programs Provide quarterly common assessments Offer professional development opportunities for mastering common core standards and planning interventions</td>
<td>Assess needs, based on school, District &amp; State student achievement data Review school-based professional development strategies to address needs Decide on supplementary curriculum and instructional materials, in alignment with common core standards, to address needs Monitor student academic proficiency</td>
<td>Implement District and SSC decisions Monitor implementation of common core standards-based curriculum and instruction Monitor, evaluate, and report the effectiveness of instruction and academic intervention programs Organize school-based professional development</td>
</tr>
<tr>
<td></td>
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</tr>
<tr>
<td>Staffing</td>
<td>Assist sites in meeting their staffing goals through counseling, recruitment, and appointment processing</td>
<td>Advise on positions to be funded to address needs identified in the Balanced Score Card Approve supplemental staff obtained through supplemental categorical funding Follow the civil services rules and contractual obligations for staffing</td>
<td>Hire all site-funded staff members Assign staff to jobs Consolidate positions when required Ensure that civil service rules, contractual obligations, and District procedures are followed</td>
</tr>
</tbody>
</table>

Note: If the SSC and the Principal are unable to reach an agreement, the District will provide mediation.
<table>
<thead>
<tr>
<th>Date</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb 3</td>
<td>BUDGET PROCESS KICKOFF: Superintendent Carranza frames the year ahead</td>
</tr>
<tr>
<td>Feb 4 - Feb 23</td>
<td>SET SCHOOL SITE PRIORITIES: Engage your broader school community in setting priorities for the coming year by reflecting on progress since drafting the BSC in Spring 2014 and gathering input from parents and others about what should be amended for the 15-16 school year.</td>
</tr>
<tr>
<td>Feb 23</td>
<td>BUDGETS AND RESOURCES RELEASED: Preliminary budget allocations and other central supports distributed to school sites.</td>
</tr>
<tr>
<td>Feb 23 - Mar 26</td>
<td>DEVELOP YOUR PLAN: Using data, feedback from the community, and lessons from the current year, every school develops a budget and a Balanced Score Card (BSC), which encompasses the federally required Single Plan for Student Achievement (SPSA).</td>
</tr>
<tr>
<td>Mar 7</td>
<td>SCHOOL PLANNING RETREAT:</td>
</tr>
<tr>
<td></td>
<td>1. Training for SSC / ELAC / SAC members</td>
</tr>
<tr>
<td></td>
<td>2. Preliminary budget allocations distributed to school sites Note: Principals will receive allocations several days prior to Retreat</td>
</tr>
<tr>
<td></td>
<td>3. Revisions to the BSC / Single Plan for Student Achievement (BSC / SPSA) template are presented to principals and school planning team members</td>
</tr>
<tr>
<td>Mar 2 - Mar 27</td>
<td>COMMUNITY MEETING(S): Every school holds at least one community meeting (e.g., an extended school site council meeting) to gather input from parents and others in the school community about what should be included in the budget and BSC/SPSA Note: Schools are encouraged to hold one community meeting in February to explain the process and gather input and a second community meeting in March to share budgets and BSC’s when drafts are available.</td>
</tr>
<tr>
<td>Mar 27</td>
<td>BUDGETS DUE: Budgets are approved and signed off by the SSC and the Principal. Schools submit completed budgets to Assistant Superintendents and to the Budget Services office (<a href="mailto:bbsc@sfusd.edu">bbsc@sfusd.edu</a>). BSC’s DUE: BSC’s are to be approved and signed off by the SSC and the Principal. Completed BSC’s are then submitted to Assistant Superintendent for review. Note: “Section II: Data Analysis Conference” of the BSC is to be completed in September once CA Standards Test results and final budget allocations are available</td>
</tr>
<tr>
<td>Mar 30 - Apr 24</td>
<td>District Reviews Budget and BSC / SPSA</td>
</tr>
<tr>
<td>Jul – Aug</td>
<td>School Data Conferences with LEAD, Research, Planning and Accountability</td>
</tr>
<tr>
<td>Sep</td>
<td>Final Budget Allocations*</td>
</tr>
<tr>
<td>Sep 25</td>
<td>Section II and final revisions to BSC / SPSA due</td>
</tr>
<tr>
<td>Sep - Oct</td>
<td>District Reviews Budget and BSC / SPSA</td>
</tr>
<tr>
<td>Oct</td>
<td>BSC’s / SPSA’s presented to the Board of Education</td>
</tr>
</tbody>
</table>

*Final allocations will reflect actual enrollment for Weighted Student Formula, as well as any changes to total amounts available in any specific resources. WSF allocations will also reflect a hold harmless “buffer” that helps absorb mid-year budget cuts at schools with enrollment falling below spring projections. In SY2013-14, the buffer amount was $50,000 and applied to schools with increasing budgets (i.e., gains at schools with budget increases were suppressed by up to $50,000). The amount is subject to change for SY2014-15 final fall allocations, but sites should be aware of this general issue and plan accordingly.
# Task List: Managing the Planning and Budgeting Process

## Key Personnel
- **Team Lead**
- **Team Members**

## Best Practices
- Hold community meetings in conjunction with other events that bring parents to school.
- Organize community members to talk in small groups, and capture their feedback.
- Create written summaries of key proposals/choices so that all constituencies get the same information and have an opportunity to give input.
- Ask SSC members to share proposals with their constituencies and get feedback.
- Use student achievement data as the basis for all discussions of the BSC/SPSA.
- Provide the Principal with the opportunity to frame his/her vision for school improvement.
- Use the SSC as a steering committee that holds discussions at a high level.
- Empower small groups to draft the BSC/SPSA.
- Make sure two people at the school know how to use the budget software.
- Create a document that makes it clear what the total budget is. Identify fixed costs (the amount of funding required to meet contractual obligations and basic supplies and other needs), and subtract from the total. What remains is discretionary funding.
- Develop funding proposals only after the main activities of the Balanced Score Card have been drafted.

## Late Feb/Early March
- Plan for community meeting
  - Pick a date
  - Get the word out
  - Identify resources, such as translators and child care providers
  - Arrange for refreshments
  - Create an agenda
  - Identify facilitators
- Plan other opportunities for gathering input (check the calendar for faculty meetings, SAC/ELAC meetings, student government meetings, etc.)
- Attend Retreat training
- Analyze progress towards this schools year’s BSC measures
  - Document student data success/needs
  - Review current year activities and evaluate efficacy
- Present current BSC/SPSA progress to community/staff & gather input
- Assign working groups to revise BSC:
  - Appoint SSC members
  - Allot specific plan-writing tasks
  - Set deadlines
  - Compile a complete draft BSC/SPSA
- Prepare 1st presentation to community/staff
- Review proposed changes for the Spring preliminary BSC/SPSA to entire community/staff
- Gather community/staff input
- Agree on revisions (SSC meeting)
- Revise BSC/SPSA
- Submit BSC/SPSA and review feedback from District Review Teams (Principal)
- Agree on revisions (SSC meeting), if needed
- Revise/resubmit BSC/SPSA, if needed
- Prepare 2nd presentation
- Review budget allocations
- Identify fixed costs and discretionary funds (see best practices below)
- Review goals and activities in the Balanced Score Card
- Develop and discuss proposals for funding aligned to the Plan
- Prioritize funding proposals (SSC meeting)

## Mid March

## Late March
- Review feedback from community/staff
- Agree on revisions (SSC meeting)
- Revise and submit Budget
- Review feedback from District Review Teams (Principal)
- Revise/resubmit Budget, if needed

<table>
<thead>
<tr>
<th>Outreach</th>
<th>Balanced Score Card Planning</th>
<th>Budget Development</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team Lead</td>
<td>Team Lead</td>
<td>Team Lead</td>
</tr>
<tr>
<td>Team Members</td>
<td>Team Members</td>
<td>Team Members</td>
</tr>
</tbody>
</table>

Last updated: February 26, 2015
Decision-Making Guidelines

School Site Councils are required at every school as a condition for participation in certain state and federally funded programs. SFUSD acknowledges the role of the SSC as a collaborative partner in the development of the Balanced Score Card and budget, a recognition that all stakeholders (students, parents, community members, teachers, other staff and principals) must contribute to the success of the school.

School principals are the critical accountable leaders at school sites. They are responsible for establishing a vision for improving achievement for all students. Principals are ultimately accountable for achieving the goals of the school and the District. Therefore, principals must ensure that the Balanced Score Card and budget are focused on meeting the identified needs of all students. School Site Council programs and budget decisions must be approved by the principal prior to inclusion in the Balanced Score Card.

SSC’s (and ELAC’s and SAC’s where applicable) must approve the use of Title I funds and have advisory responsibilities with respect to unrestricted (WSF) and other funds. In particular, ELAC’s should provide recommendations regarding the use of funds provided specifically to support English Learner students, such as the new SCG-EL resource (this replaces EIA-LEP).

Dispute Resolution

Any concerns about the Balanced Score Card, Budget, or Planning process, or any procedural questions shall be directed to the Assistant Superintendent supervising the school. The Assistant Superintendent will determine what next steps are necessary, including but not limited to mediation or dispute resolution.

If dispute resolution is necessary, the following process will apply:

- A Dispute Resolution Team will be formed consisting of the supervising Assistant Superintendent for the school, and a representative from SFUSD’s Equity Assurance Office. The Dispute Resolution Team may also include members of the Balanced Score Card Review Team, or other department heads with expertise in the dispute area (e.g. the Chief Facilities Officer may participate in resolving a facilities dispute).

- The Dispute Resolution Team will assemble a meeting within one week of contact to hear from the disputants. The structure of the meeting will be as follows:
  - Presentations by disputants (including any written materials that the parties to the dispute wish for the Team to review)
  - Presentation by mediator, where applicable, including the process of mediation and the suggested resolution
  - Deliberation and decision (without disputants present) by the Dispute Resolution Team

- Within 10 days of the meeting, the Dispute Resolution Team will communicate its decision in writing to all disputants. The Uniform Complaint process represents an opportunity for appeal.
**District Technical Assistance Team**

Schools should refer to members of Area Teams for specific questions about programmatic and budgetary planning. For questions that cannot be addressed by Area Team representatives, the following individuals can also be contacted.

<table>
<thead>
<tr>
<th>Question Topics</th>
<th>Point Person</th>
<th>Phone #</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>BSC/SPSA on SharePoint</td>
<td>Elva Gutierrez</td>
<td>241-6220</td>
<td><a href="mailto:gutierreze@sfusd.edu">gutierreze@sfusd.edu</a></td>
</tr>
<tr>
<td>Budget</td>
<td>John Chen</td>
<td>241-6187</td>
<td><a href="mailto:chenj1@sfusd.edu">chenj1@sfusd.edu</a></td>
</tr>
<tr>
<td>Categorical Programs</td>
<td>Roderick Castro</td>
<td>379-7618</td>
<td><a href="mailto:castror@sfusd.edu">castror@sfusd.edu</a></td>
</tr>
<tr>
<td>English Learners</td>
<td>Christina Wong</td>
<td>241-6121</td>
<td><a href="mailto:wongc8@sfusd.edu">wongc8@sfusd.edu</a></td>
</tr>
<tr>
<td></td>
<td>Sang-Yeon Lee</td>
<td>379-7730</td>
<td><a href="mailto:LeeS4@sfusd.edu">LeeS4@sfusd.edu</a></td>
</tr>
<tr>
<td>FileMaker Pro Budget Template</td>
<td>Brian Garcia</td>
<td>379-7620</td>
<td><a href="mailto:garciab@sfusd.edu">garciab@sfusd.edu</a></td>
</tr>
<tr>
<td>Parent Involvement Policy</td>
<td>Mary Elisalde</td>
<td>379-7618</td>
<td><a href="mailto:elisaldem@sfusd.edu">elisaldem@sfusd.edu</a></td>
</tr>
<tr>
<td>School Site Council</td>
<td>Roderick Castro</td>
<td>379-7618</td>
<td><a href="mailto:castror@sfusd.edu">castror@sfusd.edu</a></td>
</tr>
<tr>
<td></td>
<td>Stuart Jernigan</td>
<td></td>
<td><a href="mailto:jernigand@sfusd.edu">jernigand@sfusd.edu</a></td>
</tr>
<tr>
<td>Special Education Services</td>
<td>Lisa Miller</td>
<td>379-7639</td>
<td><a href="mailto:MillerL1@sfusd.edu">MillerL1@sfusd.edu</a></td>
</tr>
<tr>
<td>Student Data</td>
<td>Shannon Fierro</td>
<td>241-6400</td>
<td><a href="mailto:fierros@sfusd.edu">fierros@sfusd.edu</a></td>
</tr>
<tr>
<td></td>
<td>John Burke</td>
<td></td>
<td><a href="mailto:burkej1@sfusd.edu">burkej1@sfusd.edu</a></td>
</tr>
<tr>
<td>Student Support Services</td>
<td>Kevin Truitt</td>
<td>522-6738</td>
<td><a href="mailto:truitttk@sfusd.edu">truitttk@sfusd.edu</a></td>
</tr>
<tr>
<td>WSF Allocations</td>
<td>Myong Leigh</td>
<td>355-6917</td>
<td><a href="mailto:leighm@sfusd.edu">leighm@sfusd.edu</a></td>
</tr>
</tbody>
</table>
Web Resources

All of the materials in this packet, as well as other resources important to the development and submission of a school site’s Balanced Score Card and Budget, will be made available on the District website: http://www.sfusd.edu/en/councils-committees/school-site-council.html. These resources include:

- The Balanced Score Card Development and Site-Based Budgeting Guide, SY 2015 - 2016
- Workshop presentations and materials from the School Planning Retreat
  - Note: Many workshop materials are also translated into Chinese and Spanish
- The School Site Council Handbook (also translated into Chinese and Spanish)
- The School Site Council Handbook (also translated into Chinese and Spanish)
- Information about the Local Control Funding Formula

You will find additional helpful information on the State & Federal Programs Website:

- http://www.sfusdstateandfederal.org/index.html

And the BSC & SSC pages,


In addition, supplementary materials are available on the Parents for Public Schools website: www.ppssf.org. These resources include:

- School Governance for Parents Training Module (training presentations in English, Spanish, and Chinese)
- Sample SSC (School Site Council) bylaws
- Sample community surveys
Budget Development and Staffing

This section contains guidance to help schools develop a budget that aligns with the priorities of the Balanced Score Card and complies with applicable requirements.

Included here are:

- Budget Submission Checklist
- Building a Better Budget
- Budgeting Responsibilities (Site vs. Central Office)
- Staffing Guidelines
- Staffing Calendar Dates
- Average Salaries and Benefit Costs (SY 2015-2016)

Your school’s budget on FileMaker Pro will be sent to you by the Budget Services office via your school’s email on February 25, 2015
Budget Submission Checklist

School budgets and BSCs are due by Friday, March 27, 2015. An electronic copy of the budget must be uploaded on SharePoint and emailed to Budget Services at BBSC@SFUSD.EDU. Before turning in your budget, use this checklist to make sure you have everything you need.

Budget and Staffing

☐ Hard Copy of Reports
☐ Signed Cover Sheet
☐ Budget Summary
☐ Employee Staffing Report (Certificated and Classified)
☐ Non-Personnel Report
☐ Extended Service Report (Overtime, Extended-Hours, Stipends)
☐ Email Budget to bbsc@sfusd.edu and submit Budget with Balanced Score Card on SharePoint
Building a Better Budget

- It is crucial that School Site Councils establish strong and clear links between the Budget and academic priorities, objectives, and strategies in the Balanced Score Card.

- Budgeting can be challenging because funding is constrained, and School Site Councils must determine how to distribute limited funds, most of which come with spending restrictions, in ways that effectively support the elements of the Balanced Score Card that require financial resources.

- Suggested steps in budgeting:
  - Agree on your academic goals based on review of data
  - Identify and prioritize strategies
  - Determine how much each strategy costs
  - Review site-based allocations and minimum staffing requirements
  - Gather best available information on all other resources available, including centrally-funded resources
  - Determine total discretionary funding
  - Decide which funds should support each strategy (try starting with the most restrictive funds first)
  - Check whether the resulting budget supports a strong Balanced Score Card
  - Check whether the resulting budget is in balance with the allocated resources

    - AND IF NOT -

    - Revise the budget and/or site plan until both are sound, aligned with each other, reflect your school’s academic needs and priorities, and the budget is balanced
    - Call your technical assistance team budget contact or one of the general assistance members of the technical assistance teams if you need help

Budgeting Tips:
- Develop and maintain a “wish-list” of unfunded strategies and needs that can be referred to when new funding becomes available.
- Develop and maintain a list of items your site could live without (or with less of) in case funding decreases in the future.
### Budgeting Responsibilities (Site vs. Central Office)

<table>
<thead>
<tr>
<th>Site Budget Responsibility</th>
<th>Central Office Budget Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Personnel</strong></td>
<td></td>
</tr>
<tr>
<td>General education teachers and paraprofessionans</td>
<td>Special education teachers, paraprofessionans, and related service providers</td>
</tr>
<tr>
<td>High school librarians;* additional time for middle and elementary-school librarians*</td>
<td>Part-time librarian for elementary and middle schools*</td>
</tr>
<tr>
<td>Site administration – Leadership</td>
<td>Food and nutrition staff and services</td>
</tr>
<tr>
<td>Site administration – Office Support</td>
<td>Custodial, maintenance and other facilities staff, supplies, and overtime**</td>
</tr>
<tr>
<td>Counselors***</td>
<td>Career Technical Education and Regional Occupation Program staff</td>
</tr>
<tr>
<td>Substitutes – staff development absences</td>
<td>Substitutes – non-staff development absences</td>
</tr>
<tr>
<td>Extended calendar for non-athletic student activities</td>
<td>Athletics coaches</td>
</tr>
<tr>
<td></td>
<td>Noontime supervisors (elementary)**</td>
</tr>
<tr>
<td></td>
<td>Security aides (mostly secondary)**</td>
</tr>
<tr>
<td></td>
<td>Part-time nurse, social worker or learning support specialist for elementary and middle schools (some schools receive a full-time position)**</td>
</tr>
<tr>
<td></td>
<td>Part-time arts teacher for middle schools</td>
</tr>
<tr>
<td><strong>Services and Supplies</strong></td>
<td></td>
</tr>
<tr>
<td>Instructional materials</td>
<td>Equipment (Purchase, Repair and Maintenance)**</td>
</tr>
<tr>
<td>Library books</td>
<td>Furniture (Purchase, Repair and Maintenance)**</td>
</tr>
<tr>
<td>Replacement textbooks (for lost and damaged textbooks)</td>
<td>Basic textbooks (for new core adoptions and additional enrollment)</td>
</tr>
<tr>
<td>Computer hardware**</td>
<td>Information technology network support and technical assistance**</td>
</tr>
<tr>
<td>Special education professional development and supplies (excluding assistive technology)</td>
<td>Assistive technology for Special Education</td>
</tr>
<tr>
<td>Language translation for school-based communications and events</td>
<td>District-wide assessment</td>
</tr>
<tr>
<td>Site-based professional development</td>
<td>Telecommunications / telephones</td>
</tr>
<tr>
<td></td>
<td>Utilities</td>
</tr>
</tbody>
</table>

* For more details, see the discussion of the Public Education Enrichment Fund beginning on p. 30.

** These items will be provided centrally at a base level, but sites may supplement the centrally provided level of service or items with site-managed funds.

*** Responsibility for these items is primarily site-based, but some centrally budgeted resources will also be allocated.

**General notes: The information contained above represents a partial list of budgetary responsibilities. Other resources may also be allocated from centrally managed budgets.**
## SFUSD Certificated Hiring Process

A Quick Guide for Schools and Central Departments to fill open positions

<table>
<thead>
<tr>
<th>Step One: Post Open Position</th>
<th>Step Two: Review Candidates</th>
<th>Step Three: Select Candidate</th>
<th>Step Four: Hire Selected Candidate</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The School or Department will:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. If position is new, submit RPF to the Budget office and wait for approval and position number. If position is due to resignation, retirement, or leave, skip to #2 below.</td>
<td>1. Review candidates in SearchSoft. 2. Interview candidates, including all internal voluntary transfer candidates. 3. Conduct any supplemental selection activities, as determined by site. <strong>UESF Requirements to Note:</strong>  - All open positions must remain open and posted for at least ten business days.  - All internal applicants who apply online to an open position must be granted an interview if they are appropriately credentialed.</td>
<td>1. Make verbal offer to selected candidate, noting that it is pending final HR approval. 2. Upon acceptance from the selected candidate, submit SRPA to HR to recommend candidate. 3. Inform candidate to expect email from HR within 2 days with next steps.</td>
<td>n/a</td>
</tr>
<tr>
<td>2. Submit PDF to HR. PDF must include:  - Position number  - Reason for vacancy (visible only by HR)  - Credential requirements  - Start date  - Additional position requirements as needed  - Contact person</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Human Resources will:</th>
<th></th>
<th>n/a</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Approve PDF. 2. Post position on SearchSoft for internal and external applicants to apply. 3. Connect with school/department to offer support in hiring process.</td>
<td>1. Screen all new external applicants for position on an ongoing basis. 2. Support school/department in process (depending on need).</td>
<td>1. Approve SRPA. 2. Review and approve credential of selected candidate. 3. Notify all other candidates that they were not selected. 4. Invite selected candidate to onboarding: fingerprints, TB clearance, and new hire paperwork (external hires only). 5. Inform school/dept when candidate is cleared to start.</td>
<td>n/a</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>The Candidate will:</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Apply for position on SearchSoft (internal and external candidates).</td>
<td>1. Interview if selected by school/department.</td>
<td>1. Accept position offer.</td>
<td>1. Schedule fingerprinting with HR. 2. Complete onboarding and fingerprinting. Candidate MUST sign contract and return it to HR before reporting to work.</td>
</tr>
</tbody>
</table>

**Human Resources Hiring Glossary:**

- **RPF (Request for Position Funding):** Submit RPF in PeopleSoft to get a position number for new positions, delete a position, or change position information.
- **PDF (Position Declaration Form):** Submit PDF in PeopleSoft to post a position.
- **SRPA (Site Request for Personnel Action):** Submit SRPA in PeopleSoft to request a candidate for hire.
# Process Overview: A Quick Guide to fill open positions - for Classified Staff

<table>
<thead>
<tr>
<th>Step One: Post Open Position</th>
<th>Step Two: Review Candidates</th>
<th>Step Three: Select Candidate</th>
<th>Step Four: Hire Selected Candidate</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Department will:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. If position is new, submit RPF to the Budget office and wait for approval and position number.</td>
<td>1. Review candidates sent by HR.</td>
<td>1. Advise HR of selected candidate.</td>
<td>1. Confirm start date and salary/step with HR.</td>
</tr>
<tr>
<td>If position is due to resignation, retirement, or leave, skip to #2 below.</td>
<td>2. Make selections for interview.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Submit PDF to HR. PDF must include:</td>
<td>3. Develop interview questions in conjunction with HR.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Position number</td>
<td>4. Forward the following to HR</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Reason for vacancy (visible only by HR)</td>
<td>• List of candidates</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Start date</td>
<td>• Draft of interview questions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Contact person</td>
<td>• Interview panel member names &amp; titles</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Requirements to Note:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• All open positions must remain open and posted for at least 10 business days.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Human Resources will:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Review PDF.</td>
<td>1. Review candidates department has selected.</td>
<td>1. Inform selected candidate of their progression to next step in process.</td>
<td>1. Process paperwork.</td>
</tr>
<tr>
<td>2. Connect with department to offer support in hiring process.</td>
<td>2. Review interview questions from department.</td>
<td>2. Invite selected candidate to onboarding: fingerprinting, TB clearance, and new hire paperwork (external hires only).</td>
<td>2. Enter candidate data into PeopleSoft.</td>
</tr>
<tr>
<td>3. Determine recruitment type in conjunction with department.</td>
<td>3. Provide necessary interview documentation.</td>
<td>3. Inform school/dept when candidate is cleared to start.</td>
<td>3. Coordinate start date, start time, and other logistics with department.</td>
</tr>
<tr>
<td>4. Post position on Edjoin/JobAps for internal and external applicants to apply.</td>
<td>May be required to obtain eligible list from City DHR. If a list exists, departments will be REQUIRED to hire from this source. Current employees may not be considered if they are not on the list.</td>
<td>4. Recommend to department salary/step.</td>
<td></td>
</tr>
<tr>
<td>The Candidate will:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Apply for position or respond to eligible list notice.</td>
<td>Interview if selected by school/department.</td>
<td>1. Schedule fingerprinting with HR.</td>
<td>1. Accept position offer.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Complete onboarding, fingerprinting clearance, and TB clearance.</td>
<td></td>
</tr>
</tbody>
</table>
# HR Staffing Contacts 2015-2016

<table>
<thead>
<tr>
<th>Certificated</th>
<th>Email</th>
<th>Phone</th>
<th>Focus Area</th>
</tr>
</thead>
</table>
| Scott Gaiber                          | gaibers@sfusd.edu   | 241-6204        | Special Education  
Early Education  
Assessment & Accountability                                                 |
| Danielle Love                         | loved@sfusd.edu     | 241-6101 x3247 | Cohort 1  
Middle Schools  
VAPA  
SFCSD (nurses, counselors, Gateway to College)                              |
| Nicole Magtoto                        | magtoton@sfusd.edu  | 241-6101 x3282 | Cohort 3  
C&I - Library Services, Humanities, MPD, PE  
School Psych  
ICSN Lit Coach, IRF, RTIF                                                    |
| Grace Pun                             | pung1@sfusd.edu     | 241-6101 x3279 | High Schools  
Willie Brown MS  
C&I - CTE                                                                   |
| Swen Ervin                            | ervins1@sfusd.edu   | 241-6101 x3263 | Supt. Zone – Bayview  
C&I – Access & Equity, TSD, STEM, QTEA  
SFCSD Pupil Services, Social Workers                                        |
| Michael Moran                         | moranm@sfusd.edu    | 241-6101 x3392 | Cohort 2  
Supt. Zone – Mission                                                        |
| Stephan Gordon                        | gordons@sfusd.edu   | 241-6101 x3204 | Substitutes                                                                |

<table>
<thead>
<tr>
<th>Paraprofessional</th>
<th>Email</th>
<th>Phone</th>
<th>Focus Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meiyi Ouyang</td>
<td><a href="mailto:ouyangm@sfusd.edu">ouyangm@sfusd.edu</a></td>
<td>241-6101 x3283</td>
<td>Middle &amp; High Schools</td>
</tr>
</tbody>
</table>
| Denise Lai                            | laid@sfusd.edu      | 241-6101 x3284 | Elementary Schools  
Early Education                           |
<table>
<thead>
<tr>
<th>Administrative</th>
<th>Email</th>
<th>Phone</th>
<th>Focus Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mary Richards</td>
<td><a href="mailto:richardsm@sfusd.edu">richardsm@sfusd.edu</a></td>
<td>241-6682</td>
<td>Administrative Staffing and Operations</td>
</tr>
<tr>
<td>Brenda Alvarado</td>
<td><a href="mailto:alvaradob@sfusd.edu">alvaradob@sfusd.edu</a></td>
<td>241-6101x3286</td>
<td>Administrative Staffing Support</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Classified</th>
<th>Email</th>
<th>Phone</th>
<th>Focus Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elizabeth Rezaee</td>
<td><a href="mailto:rezaeee@sfusd.edu">rezaeee@sfusd.edu</a></td>
<td>241-6101x3257</td>
<td>All Classified Staffing</td>
</tr>
<tr>
<td>Manager, Classified Staffing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Katrina Devers</td>
<td><a href="mailto:deversk@sfusd.edu">deversk@sfusd.edu</a></td>
<td>241-6101 x3277</td>
<td>Secretaries</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Parent &amp; Community Coordinators</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>School Lunchroom Helpers</td>
</tr>
<tr>
<td>Scott DeWolfe</td>
<td><a href="mailto:dewolfes@sfusd.edu">dewolfes@sfusd.edu</a></td>
<td>241-6101 x3253</td>
<td>IT</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Administrative Analyst Series</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Personnel Series</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Management Series</td>
</tr>
<tr>
<td>Donna Ho</td>
<td><a href="mailto:hod@sfusd.edu">hod@sfusd.edu</a></td>
<td>241-6101x3274</td>
<td>Buildings &amp; Grounds (Custodians, Painters, Architects, Carpenters, etc.)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>AVID Tutors</td>
</tr>
<tr>
<td>Rhodora Sangalang</td>
<td><a href="mailto:sangalangr@sfusd.edu">sangalangr@sfusd.edu</a></td>
<td>241-6101x3252</td>
<td>Classified Staffing Support</td>
</tr>
</tbody>
</table>

Human Resources Management Team

Mónica Vásquez
Chief, HR Officer
MonicaVasquez@sfusd.edu
241-6105

Glenys Rogers
Director, Special Projects
rogersg@sfusd.edu
241-6101 x3385

Angie Sagastume
Executive Director, Certificated Staffing
sagastumea@sfusd.edu
241- 6415

Mary Richards
Executive Director, Administrative Support
richardsm@sfusd.edu
241-6682

Daniel Menezes
Executive Director, Operations & Analytics
menezesd@sfusd.edu
241-6101 x 3255
### Certificated Staffing Calendar Dates
SY 2015-16*

<table>
<thead>
<tr>
<th>March, 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>March 1</strong></td>
</tr>
<tr>
<td><strong>March 7</strong></td>
</tr>
<tr>
<td><strong>March 17</strong></td>
</tr>
<tr>
<td><strong>March 27</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>April, 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Feb. 16 to April 10</strong></td>
</tr>
<tr>
<td><strong>April 14</strong></td>
</tr>
<tr>
<td><strong>April 21</strong></td>
</tr>
<tr>
<td><strong>April 22</strong></td>
</tr>
<tr>
<td><strong>April 28</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>May, 2015</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>May 5 to May 12</strong></td>
</tr>
<tr>
<td><strong>May 14</strong></td>
</tr>
</tbody>
</table>

*Exact dates subject to change

---

**Human Resources**
555 Franklin Street 2nd Floor, San Francisco, CA  94102
Tele: (415) 241-6204 Fax: (415) 241-6543
## Average Salaries and Benefit Costs for 2015 - 2016

<table>
<thead>
<tr>
<th>Job Code</th>
<th>Description</th>
<th>2015-2016 Average Salary Amount (Adjusted)</th>
<th>2015-2016 Benefits Amount</th>
<th>Total Average Cost 2015-2016**</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Certificated Positions</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>461</td>
<td>Principal, High School</td>
<td>$114,014</td>
<td>$36,476</td>
<td>$150,490</td>
</tr>
<tr>
<td>462, 464</td>
<td>Principal, Middle or K-8 School</td>
<td>$109,144</td>
<td>$35,308</td>
<td>$144,452</td>
</tr>
<tr>
<td>463</td>
<td>Principal, Elementary</td>
<td>$104,398</td>
<td>$34,170</td>
<td>$138,568</td>
</tr>
<tr>
<td>468, 467</td>
<td>Small School Administrator</td>
<td>$85,927</td>
<td>$29,741</td>
<td>$115,668</td>
</tr>
<tr>
<td>561</td>
<td>Assistant Principal, High School</td>
<td>$94,892</td>
<td>$31,891</td>
<td>$126,783</td>
</tr>
<tr>
<td>562, 564</td>
<td>Assistant Principal, Middle or K-8 School</td>
<td>$88,948</td>
<td>$30,465</td>
<td>$119,413</td>
</tr>
<tr>
<td>563</td>
<td>Assistant Principal, Elementary</td>
<td>$89,803</td>
<td>$30,670</td>
<td>$120,473</td>
</tr>
<tr>
<td>796</td>
<td>Head Counselor</td>
<td>$80,641</td>
<td>$28,473</td>
<td>$109,114</td>
</tr>
<tr>
<td>811</td>
<td>Department Head</td>
<td>$77,753</td>
<td>$27,781</td>
<td>$105,533</td>
</tr>
<tr>
<td>925</td>
<td>Social Worker / LSP</td>
<td>$64,368</td>
<td>$24,571</td>
<td>$88,939</td>
</tr>
<tr>
<td>932</td>
<td>Nurse</td>
<td>$77,891</td>
<td>$27,814</td>
<td>$105,705</td>
</tr>
<tr>
<td>934</td>
<td>Psychologist/ Speech Pathologists*</td>
<td>$86,865</td>
<td>$29,966</td>
<td>$116,830</td>
</tr>
<tr>
<td>Various</td>
<td>Teacher, Counselor, Librarian</td>
<td>$66,912</td>
<td>$25,181</td>
<td>$92,093</td>
</tr>
<tr>
<td><strong>Classified Positions (all salary and benefit amounts are for school term only)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1021</td>
<td>IS Administrator I</td>
<td>$64,870</td>
<td>$34,402</td>
<td>$99,273</td>
</tr>
<tr>
<td>1022</td>
<td>IS Administrator II</td>
<td>$76,645</td>
<td>$38,989</td>
<td>$115,633</td>
</tr>
<tr>
<td>1424</td>
<td>Clerk Typist</td>
<td>$40,818</td>
<td>$25,034</td>
<td>$65,852</td>
</tr>
<tr>
<td>1426</td>
<td>Senior Clerk Typist</td>
<td>$46,717</td>
<td>$27,332</td>
<td>$74,048</td>
</tr>
<tr>
<td>1446</td>
<td>Secretary II</td>
<td>$53,271</td>
<td>$29,884</td>
<td>$83,155</td>
</tr>
<tr>
<td>2708</td>
<td>Custodian*</td>
<td>$43,106</td>
<td>$25,925</td>
<td>$69,031</td>
</tr>
<tr>
<td>2977</td>
<td>Education Integration Specialist *</td>
<td>$80,096</td>
<td>$40,333</td>
<td>$120,429</td>
</tr>
<tr>
<td>3536</td>
<td>Technical Instructional Assistant, Performing Arts</td>
<td>$39,048</td>
<td>$24,345</td>
<td>$63,392</td>
</tr>
<tr>
<td>3593N</td>
<td>Noon Monitor*</td>
<td>$20,580</td>
<td>$2,254</td>
<td>$22,834</td>
</tr>
<tr>
<td>3616</td>
<td>Library Technical Assistant</td>
<td>$56,355</td>
<td>$31,086</td>
<td>$87,441</td>
</tr>
<tr>
<td>9977</td>
<td>Parent &amp; Community Coordinator</td>
<td>$61,153</td>
<td>$32,955</td>
<td>$94,107</td>
</tr>
<tr>
<td>R20, R40, R50, R70</td>
<td>Family Liaison, Community Relations Specialist</td>
<td>$45,827</td>
<td>$18,049</td>
<td>$63,876</td>
</tr>
<tr>
<td>T10</td>
<td>Campus Security Guard*</td>
<td>$36,384</td>
<td>$16,212</td>
<td>$52,596</td>
</tr>
<tr>
<td>Various</td>
<td>Paraprofessional, Instructional Aide</td>
<td>$37,188</td>
<td>$16,369</td>
<td>$53,557</td>
</tr>
</tbody>
</table>

*These positions are generally not included in site-based budgets but can be added to supplement positions provided centrally by the District.

** Costs listed include all negotiated increases plus a 1% step and column adjustment.
Guidelines for Various Funding Sources

This section contains guidance on how to use the available funding sources. All school sites in SFUSD receive at least one of these funding sources.

Included here are:

- Funding Sources Managed by School Sites
- Guidelines for Funding Arts and Music, Libraries, Athletics, and Physical Education
- Public Education Enrichment Fund (Prop H) – 2015-2016 Site Based Budgeting Guide
- Categorical Program Funding Guideline
- Examples of Allowable Expenditures
Funding Sources Managed by School Sites

The funding sources included in the table below are to be budgeted by school sites and reflected in each school’s Balanced Score Card.

A number of one-time state grants – the Discretionary Block Grant, the Arts and Music Block Grant and the Instructional Materials, Library Materials, and Educational Block Grant – were allocated to sites in school years 2006 - 2007 and 2007 - 2008. Remaining balances in these grants at the site level were rolled into a single funding source, the Discretionary Block Grant, in 2011-12. Unspent funds in the Discretionary Block Grant can be carried over into the school year 2014 – 2015. Balances in these two resources will be incorporated in the final fall allocations.

Funding for the School & Library Improvement Block Grant is now part of the Local Control Funding Formula and is no longer recognized as a separate resource by the California Department of Education. As a result, these funds have been folded into the Weighted Student Formula. After the end of SY2014-15, unspent SLIBG funds will no longer be carried over into the following year.

<table>
<thead>
<tr>
<th>Site-Based Resources</th>
<th>Permitted Uses / Funding Guidelines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weighted Student Formula</td>
<td>May be spent on any lawful purpose, including basic instructional and administrative staffing.</td>
</tr>
<tr>
<td></td>
<td><em>The core program (minimum administrators, classroom teachers, and secretary/clerk) must be funded using WSF dollars.</em></td>
</tr>
<tr>
<td></td>
<td>The BSC budget section should describe how English Learner and low income students are benefiting from WSF funding that is directly related to their enrollment at each school.</td>
</tr>
<tr>
<td>Weighted Student Formula – Special Education</td>
<td>Special Education materials, professional development, common planning time and other investments to increase or improve services to students with disabilities.</td>
</tr>
<tr>
<td>Title I</td>
<td>Provide services and materials to <em>supplement</em> the core program for students from low income families.</td>
</tr>
<tr>
<td></td>
<td><em>See Categorical program Funding Guideline for a more detailed description of the allowable uses and restrictions.</em></td>
</tr>
<tr>
<td>Supplemental Concentration Grant – Low Income (SCG-LI)</td>
<td>Provide personnel, training, and educational materials to <em>supplement</em> the core program for under-performing students.</td>
</tr>
<tr>
<td></td>
<td>Sites should use these funds to increase or improve services for under-performing low income students.</td>
</tr>
<tr>
<td>Site-Based Resources</td>
<td>Permitted Uses / Funding Guidelines</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td><strong>Supplemental Concentration Grant – English Learner (SCG-EL)</strong></td>
<td>Provide personnel, professional development and educational materials to supplement core language program for English learners. For more detail, refer to the discussion of English Learner Pathways and Services. Sites should continue to use these funds to increase or improve services for English Learner students.</td>
</tr>
<tr>
<td><strong>Concentration Funds</strong></td>
<td>Supplemental strategies to increase or improve services to underserved students and to provide access for all students to high-quality programs.</td>
</tr>
<tr>
<td><strong>Targeted Instructional Improvement Grant</strong></td>
<td>Supplemental strategies to increase or improve services to underserved students and to provide access for all students to high-quality programs. <em>Note: Although these funds are technically unrestricted under the LCFF, sites are expected to use these funds to benefit targeted students</em></td>
</tr>
<tr>
<td><strong>Public Education Enrichment Fund (Prop H) – This refers only to funds budgeted by school sites. Site-based allocations have been approved by the Board and must abide by PEEF expenditure guidelines provided on following pages.</strong></td>
<td>See tables on following pages.</td>
</tr>
<tr>
<td><strong>Discretionary Block Grant (One-Time) (Carryover funds only – there are no new allocations for 2015-2016)</strong></td>
<td>Any lawful purpose. <em>These funds will be made available with the fall revised site allocations and may be carried over at each site.</em></td>
</tr>
</tbody>
</table>

**Other Site Resources:**
- Site-Specific Grants
- Trust Funds
Local Control Funding Formula (LCFF)

The Governor’s 2013-2014 education budget implemented a new methodology for the allocation of state funding for K-12 education, the Local Control Funding Formula (LCFF). The LCFF provides a more equitable way of distributing education revenues to school districts, charter schools and county offices of education.

LCFF replaced the then existing revenue limit funding system, as well as more than 40 state categorical programs, with a base grant per pupil plus supplemental and concentration funding for specific populations of students - students who are not English Language proficient, who are from low-income households or who are in foster care.

LCFF is currently projected to be phased in over an eight year period, with full implementation occurring by FY 2020-2021. The state education budget provides funding each year to close the gap between current levels and the target funding levels to be reached at the end of the seven year phase in period.

The majority of state categorical programs have been rolled into the LCFF, with the exception of programs that are federally-mandated (e.g. child nutrition and Special Education), programs that are the result of a voter ballot initiative (e.g. after school programs) or are the outcome of a legal settlement (e.g. QEIA).

Pupil Transportation and Targeted Instructional Improvement Grant (TIIG) funding continue as add-ons to the formula for those school districts that historically received funding through these programs. Economic Impact Aid (EIA) funding, previously a restricted program with specific compliance and reporting requirements, is now rolled into the LCFF. Both Pupil Transportation and Economic Impact Aid are now unrestricted revenue sources.

The LCFF increases the base grant by a supplemental grant and a concentration grant. These grants are determined by the number of pupils who are either eligible for free and reduced priced meals, who are identified as English Learners or who are Foster Youth. Grants are determined on an unduplicated count of pupils, that is, a student can only be counted once, regardless of how many categories the student may fall under. The funding provided under these grants may be used for any locally determined educational purpose as long as it substantially benefits the pupils that generate the funds. The Superintendent of Public Instruction annually computes the percentage of unduplicated pupil count utilizing data reported through the California Longitudinal Pupil Achievement Data System (CALPADS).
This chart is to serve as a guide on how to use the three LCFF sources, SCG-EL, SCG-LI and Concentration, and can be a reference in determining program goals and expenditures in the Balanced Scorecard/Single Plan for Student Achievement (BSC/SPSA) that are appropriate for these funds. In SFUSD, schools receive at least one of these three funding sources.

<table>
<thead>
<tr>
<th>Funding Source</th>
<th>SCG-EL 07091</th>
<th>SCG-LI 07090</th>
<th>Concentration 07092</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Funding Description</strong></td>
<td>Under the new Local Control Funding Formula (LCFF), Supplemental Concentration Grant for English Learners (SCG-EL) Funds should be used to support programs and activities that will “increase or improve services” for English Learners (AB 97).</td>
<td>Under the new Local Control Funding Formula (LCFF), Supplemental Concentration Grant for under-performing students at designated high schools (SCG-LI). Funds should be used to increase or improve services for under-performing low income students.</td>
<td>Under the new Local Control Funding Formula (LCFF), an additional Concentration fund is provided to schools with high concentrations of English Learners, Low-Income Student and Foster Youth.</td>
</tr>
<tr>
<td><strong>Students to be served</strong></td>
<td>English Learners and Limited English Proficient students</td>
<td>Students performing below the level appropriate for their age/grade.</td>
<td>English Learners, low-income, Foster Youth and students performing below the level appropriate for their age/grade.</td>
</tr>
<tr>
<td><strong>Expenditure Requirements</strong></td>
<td>The school must use SCG-EL funds to “increase or improve services” for English Learners in proportion to the number of English Learners who generated the additional funds (AB 97). These expenditures must be outlined and described in the BSC/SPSA for each school. Each ELAC should have the opportunity to review and provide recommendations on the site’s SCG-EL budget.</td>
<td>The school must use SCG-LI funds to “increase or improve services” for students identified above. These expenditures must be outlined in the BSC/SPSA. These expenditures must be outlined and described in the BSC/SPSA for each school. The SSC should have the opportunity to review and advise on the site’s SCG-LI budget.</td>
<td>Because schools receiving these funds have an enrollment of unduplicated students in excess of 55% of the district’s total enrollment, Concentration funds may be spent on a schoolwide basis, but must be directed toward services that meet the needs of the students listed above. These expenditures must be outlined and described in the BSC/SPSA. These expenditures must be outlined in the BSC/SPSA for each school. The SSC should have the opportunity to review and advise on the site’s Concentration budget.</td>
</tr>
</tbody>
</table>
### Examples of Allowable Expenditures

<table>
<thead>
<tr>
<th>Focus</th>
<th>SCG-EL 07091</th>
<th>SCG-LI 07090</th>
<th>Concentration 07092</th>
</tr>
</thead>
</table>
| **Academic Support for Students in dedicated ELD, English Language Arts, Math, Science and Social Studies** | **Potential Uses of SCG-EL funds:**  
- Primary language and SDAIE supplemental instructional text, materials and equipment for students  
- Additional courses for English Learners to be successful in accessing the core curriculum, including specialized ELD for Long-Term ELs  
- Lower class size in ELD and other courses for beginning and early intermediate English Learners  
- Primary language instruction/support, e.g. hire bilingual paraprofessionals to work with English Learners to access the core curriculum  
- Extended hours for teachers or paraprofessionals to offer tutorials after school and in the summer for students needing intensive language instruction  
- EL coordinator for one period a day (secondary schools)  
- Extended day/week/year for targeted students  
- Targeted intervention to accelerate EL students' reclassification  
- Support for CELDT and/or reclassification process  
- Academic interventions to support students in meeting Benchmarks and reaching academic proficiency and/or passing CAHSEE | **Potential Uses of SCG-LI funds:**  
- Supplemental instructional materials that support classroom instruction  
- Specialized and targeted academic interventions  
- Extended learning programs for targeted students, including academic support  
- Supplementary primary language support and/or primary language materials  
- Additional CAHSEE interventions  
- Extended hours for teachers or paraprofessionals to offer tutorials before/after school and in the summer for additional instruction  
- Targeted intervention to accelerate learning in ELA or Mathematics  
- Supports to improve or increase student engagement | **Potential Concentration funds:**  
- Supplemental instructional materials that support classroom instruction  
- Specialized and targeted academic interventions  
- Extended learning programs for targeted students, including academic support  
- Supplementary primary language support and/or primary language materials  
- Extended hours for teachers or paraprofessionals to offer tutorials before/after school and in the summer for additional instruction  
- Targeted intervention to accelerate learning in ELA or Mathematics  
- Supports to improve or increase student engagement and school climate |

**Reminder:** SCG and Concentration funds are supplemental. They should not be used to pay for core materials or core staffing.
Examples of Allowable Expenditures (continued)

<table>
<thead>
<tr>
<th>Focus</th>
<th>SCG-EL 07091</th>
<th>SCG-LI 07090</th>
<th>Concentration 07092</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support Personnel</td>
<td>▪ Reading/Math/ELD Coaches</td>
<td>▪ Reading/Math/ELD coaches</td>
<td>See SCG-EL and SCG-LI</td>
</tr>
<tr>
<td></td>
<td>▪ Bilingual Intervention Teacher</td>
<td>▪ Intervention Teacher</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Bilingual Paraprofessional</td>
<td>▪ Paraprofessional</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Bilingual Counselor</td>
<td>▪ Family Liaison</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Bilingual Community Liaison</td>
<td>▪ Additional counseling staff</td>
<td></td>
</tr>
<tr>
<td>Note: SCG and Concentration funds cannot be used to pay for core personnel that would otherwise be funded through general funds.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Capacity Building &amp; Professional Development</td>
<td>▪ Principal coaching/training on meeting the needs of ELs</td>
<td>▪ Principal coaching/training on meeting the needs of under-achieving students, including ELA, Mathematics, ELD instruction</td>
<td>See SCG-EL and SCG-LI</td>
</tr>
<tr>
<td></td>
<td>▪ Teacher coaching/training on ELD, SDAIE, or primary/pathway language instruction</td>
<td>▪ Teacher coaching/training on meeting the needs of under-achieving students, including ELA, Mathematics, ELD instruction</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Teacher/support, staff stipends, or ECs for professional development</td>
<td>▪ Teacher/support, staff stipends, or ECs for professional development</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Teacher substitutes for professional development</td>
<td>▪ Teacher substitutes for professional development</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Training materials/resources</td>
<td>▪ Training materials/resources</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Consultants to support professional development work</td>
<td>▪ Consultants to support professional development work</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Support staff coaching/training to support EL students and their families</td>
<td>▪ Support staff coaching/training to support EL students and their families</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Conferences/workshops that support school plan goals for ELs</td>
<td>▪ Conferences/workshops that support school plan goals for focus students</td>
<td></td>
</tr>
</tbody>
</table>

Last updated: February 26, 2015
## Examples of Allowable Expenditures (continued)

<table>
<thead>
<tr>
<th>Focus</th>
<th>SCG-EL 07091</th>
<th>SCG-LI 07090</th>
<th>Concentration 07092</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Parent Engagement</strong></td>
<td>Use of funds for parent engagement should focus on ELAC and other EL parent activities which may include:</td>
<td>Use of funds for parent engagement should focus on parent activities to improve student achievement for under-performing students and may include:</td>
<td>Use of funds for parent engagement should focus on parent activities to improve student achievement for student groups listed above and can include those activities listed for SCG-EL and SCG-LI</td>
</tr>
<tr>
<td></td>
<td>▪ ELAC expenditures (i.e. handouts, translation)</td>
<td>▪ Parent training/education opportunities</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ EL parent training/education opportunities</td>
<td>▪ Parent workshops and support materials</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ EL parent workshops and support materials</td>
<td>▪ Reasonable costs for refreshments for parent workshops and training</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Reasonable costs for refreshments for EL parent activities</td>
<td>▪ Translation, e.g. stipends for appropriately trained teachers or paraprofessionals who translate for parents outside the regular school day</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Translation, e.g. stipends for appropriately trained teachers or paraprofessionals who translate for parents outside the regular school day</td>
<td>▪ Child care for parent involvement/education activities</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Child care for EL parent involvement/education activities</td>
<td>▪ Child care for parent involvement/education activities</td>
<td></td>
</tr>
<tr>
<td></td>
<td>▪ Communication with EL parents (e.g. newsletters, postage)</td>
<td>▪ Communication with parents (e.g. newsletters, postage)</td>
<td></td>
</tr>
</tbody>
</table>
Guidelines for Funding Arts and Music, Libraries, Athletics, and Physical Education

Each school site receives funds to allocate toward arts and music, library, athletics, and physical education programs. The District centrally allocates funds toward these programs as well. The table below shows the various sources of funding for these programs, as well as guidelines on how each funding source may be used. Follow the elementary school, middle school or high school columns to see what resources are available for your school.

Please note that the next section provides additional detail on the Public Education Enrichment Fund (PEEF), also known as Prop H.

<table>
<thead>
<tr>
<th>Funding Source</th>
<th>Funding Use</th>
<th>ES</th>
<th>MS</th>
<th>HS</th>
<th>Site Based Funding</th>
<th>Central Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>PEEF (Prop H) Arts and Music</td>
<td>Arts teachers</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PEEF (Prop H) Arts and Music</td>
<td>Generalist arts teachers and Instrumental music teachers</td>
<td>√</td>
<td></td>
<td>√</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PEEF (Prop H) Arts and Music</td>
<td>Per pupil arts allocation</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td></td>
</tr>
<tr>
<td>PEEF (Prop H) Arts and Music</td>
<td>Arts Coordinators</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Elementary Arts Program</td>
<td>Funding for visiting artists</td>
<td>√</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discretionary Block Grant Carryover</td>
<td>Funding for arts related professional development, library and educational technology equipment, and supplies</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td></td>
</tr>
<tr>
<td>PEEF (Prop H) Libraries</td>
<td>Librarians</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PEEF (Prop H) Libraries</td>
<td>Per pupil library allocation</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PEEF (Prop H) Libraries</td>
<td>Library databases</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td></td>
<td></td>
</tr>
<tr>
<td>School and Library Improvement Block Grant (SLIBG)</td>
<td>Staffing, materials, and equipment</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PEEF (Prop H) Athletics</td>
<td>Uniforms, supplies, equipment, athlete transportation, stipends for coaches and athletic facility repairs</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PEEF (Prop H) Physical Education</td>
<td>Elementary Physical Education School Specialists</td>
<td>√</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PEEF (Prop H) Physical Education</td>
<td>Elementary Physical Education Site Coordinators</td>
<td>√</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PEEF (Prop H) Physical Education</td>
<td>Physical education equipment, professional development, and credentialed PE teachers</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Public Education Enrichment Fund (Prop H) site-based per-pupil allocations

- Unspent PEEF allocations cannot be carried over into the next school year
- Site allocation amounts will be adjusted in fall based on 2015-16 actual site enrollment (plan for changes)

PEEF Resources Codes:
90534 – Athletics
90535 – Libraries
90551 – Physical Education
90552 – VAPA

Site Allocations will be loaded within appropriate resource and site org number in July 2014.

For more information contact:
Kathy Fleming
Supervisor, PEEF
415-515-8496
flemingk@sfusd.edu

Spending is restricted to the uses detailed below:

**Athletics:**
Any item or service that is used primarily for athletic program purposes; examples include:
- Athletic supplies and equipment such as uniforms, bats, balls, racquets, bases, and nets
- Athletic facility supplies such as basketball backboards and scoreboards
- Stipends for athletic event workers and game officials
- Team transportation
- Athlete awards (Please contact Athletics Office or PEEF Office for guidelines for athlete awards)
(This Funding is not to be used for intramurals or Physical Education)

**Libraries (orders placed though Library Department):**
- Books – limit of five of each title (no textbooks or class sets)
- Magazines
- Technology for library use

**Physical Education:**
- All equipment for FITNESSGRAM testing materials
- All grade and age appropriate equipment that supports standards-based instruction in physical education classes
- Guest speakers or presenters related to physical education
- Professional development for physical education and classroom teachers
- Credentialed physical education teachers
(This funding is not to be used for athletics expenditures)

**Visual and Performing Arts (VAPA):**
- Arts supplies/materials
- Arts Field trips
- Artists-in-residence
- Professional development
- Credentialed arts teachers
<table>
<thead>
<tr>
<th>Public Education Enrichment Fund (Prop H)</th>
<th>Funding Use</th>
<th>ES</th>
<th>MS</th>
<th>HS</th>
<th>Site Based Funding</th>
<th>Central Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>VAPA</strong></td>
<td>FTE Allocations for arts teachers based on school size and predetermined need (elementary allocation may include generalist and instrumental; includes K-8)</td>
<td>0.6-1.0</td>
<td>1.2-2.2</td>
<td>0.4-1.6</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td><strong>VAPA</strong></td>
<td>Per Pupil Allocations</td>
<td>Arts supplies/materials, Arts field trips, artists-in-residence, professional development and/or credentialed arts teachers</td>
<td>$10.00</td>
<td>$20.00</td>
<td>$20.00</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Libraries</strong></td>
<td>FTE Allocations for Librarians Based on school size</td>
<td>0.4-1.0</td>
<td>0.6-1.0</td>
<td>0.4 FTE for small high schools</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td><strong>Libraries</strong></td>
<td>Per Pupil Allocations</td>
<td>Books (not textbooks or class sets) limit of five of each, magazines, and technology for library use Orders placed through Library Department</td>
<td>$12.00</td>
<td>$12.00</td>
<td>$12.00</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Physical Education</strong></td>
<td>FTEs placed at K-5 sites receiving physical education program support (includes K-8 sites)</td>
<td>TBD</td>
<td>None</td>
<td>None</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td><strong>Physical Education</strong></td>
<td>Per Pupil Allocations</td>
<td>All equipment for FITNESSGRAM testing materials, equipment that supports standards-based instruction in physical education classes, guest speakers or presenters related to physical education, professional development for physical education and classroom teachers</td>
<td>None</td>
<td>$12.00</td>
<td>$12.00</td>
<td>✓</td>
</tr>
<tr>
<td><strong>Athletics</strong></td>
<td>Sports Team Allocations</td>
<td>Allocations vary to HS &amp; MS sites; based on number and type of athletic teams at each school that is in the SFUSD AAA Athletic league (each athletic team is allocated a fixed amount)</td>
<td>None</td>
<td>TBD</td>
<td>TBD</td>
<td>✓</td>
</tr>
</tbody>
</table>
Categorical Program Funding Guideline

This chart is to serve as a guide on how to use the categorical funding sources, Title I, and can be a reference in determining program goals and expenditures in the BSC/SPSA that are appropriate for this restricted funds. Categorical Programs are programs for which funding is restricted to specific purposes. These purposes are governed by a unique set of state and federal laws and regulations.

In SFUSD, schools are identified for Title I funding based on the district poverty rate percentage.

<table>
<thead>
<tr>
<th>Funding Source</th>
<th>Title I, A 31500</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Funding Description</strong></td>
<td>A federal program that provides supplementary funds to help improve instruction in high poverty schools to ensure all students meet state academic standards. <strong>Note:</strong> All uses of Title I funds must be based on scientifically-based research and data that verify actions resulting in increased student achievement.</td>
</tr>
<tr>
<td><strong>Students to be served</strong></td>
<td>Students who are Far Below Basic, Below Basic &amp; Basic on CST and grade level benchmarks, including English Learners &amp; Students with Disabilities. <strong>Note:</strong> Currently, all SFUSD Title I schools are school-wide programs so they can use Title I funds to supplement the school-wide educational program.</td>
</tr>
<tr>
<td><strong>Expenditure Requirements</strong></td>
<td>The school must use Title I funds only to supplement, not supplant, state and local funds. These expenditures must be outlined in the BSC/SPSA. In addition: ● All schools must reserve at least 1% of the Title I allocation for Parent Involvement</td>
</tr>
<tr>
<td><strong>Other Requirements</strong></td>
<td>All Title I Schools are required to have a Parent Involvement Policy and Home-School Compact</td>
</tr>
</tbody>
</table>
## Examples of Allowable Expenditures

<table>
<thead>
<tr>
<th>Focus</th>
<th>Title I, A 31500</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Academic Support for Students in English Language Arts (Reading, Writing, ELD), Math, Science and Social Studies</strong>&lt;br&gt;&lt;br&gt;<strong>Reminder:</strong> Title I funds are supplemental. They should not be used to pay for core materials or staff. In general, capital equipment (i.e. furniture, audio/visual equipment) and food should not be paid for with categorical funds</td>
<td><strong>EXAMPLES:</strong>&lt;br&gt;- Supplemental instructional materials that support classroom instruction&lt;br&gt;- Specialized and targeted academic interventions&lt;br&gt;- Extended learning programs for targeted students (extended calendar for before or after school academic support)&lt;br&gt;- Supplemental primary language materials&lt;br&gt;- Professional Development for staff</td>
</tr>
<tr>
<td><strong>Support Personnel</strong>&lt;br&gt;&lt;br&gt;<strong>Reminder:</strong> Time Accounting Reports are required for staff hired using federal resources</td>
<td><strong>Support Personnel</strong>&lt;br&gt;- Reading/Math/ELD Coaches&lt;br&gt;- Intervention teacher&lt;br&gt;- Paraeducator&lt;br&gt;- Counselor&lt;br&gt;- Parent Liaison&lt;br&gt;&lt;br&gt;<strong>Note:</strong> Title I funds cannot be used to pay for core personnel that would otherwise be funded through general funds.</td>
</tr>
<tr>
<td><strong>Capacity Building &amp; Professional Development</strong>&lt;br&gt;&lt;br&gt;<strong>EXAMPLES:</strong>&lt;br&gt;- Training focused on under-achieving students&lt;br&gt;- Consultants to support professional development work&lt;br&gt;- Principal coaching/training&lt;br&gt;- Teacher coaching/training&lt;br&gt;- Support staff coaching/training&lt;br&gt;- Teacher/Support staff stipends or extra hours for professional development&lt;br&gt;- Substitutes to release teachers for PD&lt;br&gt;- Training Materials/resources&lt;br&gt;- Extra planning time&lt;br&gt;- Conferences/workshops that support school plan goals</td>
<td><strong>Parent Engagement</strong>&lt;br&gt;Must use at least 1% of Title I allocation for Parent involvement activities which may include:&lt;br&gt;- School Site Council expenditures (i.e. handouts, translation)&lt;br&gt;- Parent training/education opportunities&lt;br&gt;- Parent Workshops&lt;br&gt;- Parent support materials&lt;br&gt;- Translation&lt;br&gt;- Child care for parent involvement/education activities&lt;br&gt;- Communication with parents (e.g. newsletters, postage)&lt;br&gt;- Reasonable costs for refreshments for parent involvement activities and workshops *&lt;br&gt;&lt;br&gt;<strong>Note:</strong> You need to be very careful about using federal resources for the cost of refreshments. You cannot pay for food/beverage for required meetings (i.e. ELAC, SSC, staff meetings), but you can use to pay for refreshments for parent workshops</td>
</tr>
</tbody>
</table>
Priority Action Areas and Compliance Requirements

This section provides additional guidance around some of the priority action areas, as well as areas with specific compliance requirements.

• State and Federal Funded Programs
• Special Education
• English Learner Pathways and Services
• Gifted and Talented Education (GATE)
State and Federal Funded Programs (FAQ)

What are categorical programs?

These programs consist of special federal or state funds designated for specific purposes or for a specific student population and established by legislation.

What is compensatory education?

This is defined as supplementary (over and above) instructional and support services provided from categorical monies for students who have been identified to be eligible for such services because they are educationally disadvantaged, and because such students are enrolled in a school in which there is a large proportion of students who are economically disadvantaged. Title I-Part A is a compensatory education program. Most of the other state compensatory programs are now included in LCFF (e.g. EIA-LEP and EIA-SCE).

What is Title I?

Title I is one of 10 titles of the Elementary and Secondary Act, amended by No Child Left Behind (NCLB) in 2001. Title I has 9 parts, of which Part A-Improving Basic Programs Operated by Local Educational Agencies is the most commonly discussed. Title I-Part A is a federal program to expand and improve the educational opportunities of educationally disadvantaged students, especially in Language Arts/Reading, Mathematics, and Science. Other titles of NCLB may also affect Title I-Part A, such as Title II and Title IX.

What happened to Economic Impact Aid?

Economic Impact Aid (EIA-LEP and EIA-SCE) was one of the many state funding sources that have been consolidated into the Local Control Funding Formula (LCFF). While schools will no longer see and EIA-LEP or EIA-SCE allocation on their school budgets, funds are being allocated under LCFF to address the needs of English Learners, Low-Income students and Foster Youth. See pages 23-27 for more information about LCFF.

What is the difference between Title I SWP (School-Wide Program) and TAS (Targeted Assistance Schools)?

A Title I TAS is a school in which many children from low-income families are enrolled, and which is eligible for Title I funds. Selected students who are not meeting grade-level standards are designated by the school site to be the recipients of Title I services. Per SFUSD Board Policy, schools must use multiple criteria for selection. The main purpose is to help educationally disadvantaged students achieve grade-level proficiency.

A Title I SWP is also a school in which many children from low-income families are enrolled, and which is eligible for Title I funds. In this case, however, if the student population is 40% or more low-income students, the Site Council Committee may decide to use the Title I funds school-wide for the benefit of the low achieving students. This is a formal process that requires a comprehensive assessment, researched-based reform strategies, and other components mandated by law. The purpose of SWP is to upgrade the entire educational program of the school. Both school-wide and targeted assistance programs must use effective methods and instructional strategies that are based on scientifically-based research.

What is a school Parent Involvement Policy and Home-School Compact, and which funding requires it?

Title I, Part A requires School Level Parent Involvement Policies and Home-School Compacts for improved student achievement. The policy and the compact are jointly developed with, and distributed to, parents of participating
students. The policy describes a) the involvement of parents in the Title I program, b) the school-parent compact, c) building capacity for parent involvement, and d) accessibility for parents to participate (i.e. providing information and school reports in a form and language parents understand). The compact describes a) the school’s responsibility to provide high-quality curriculum and instruction, b) the parents’ responsibility to support their children’s learning, and c) ongoing communication between parents and teachers. At a minimum, it includes annual conferences, reports on student progress, access to staff, and opportunities to volunteer and participate in and observe the educational program. Further guidance and templates are available on the School Site Council website page: http://www.sfusd.edu/en/councils-committees/school-site-council.html

What are the fiscal requirements for NCLB-Title I Part A?

Section 1120A of the Act specifically requires a) the district to maintain fiscal effort; b) federal funds to supplement, not supplant, non-federal funds; and c) the district to provide comparable services. These funding requirements continue to hold true even though SFUSD did receive the NCLB CORE Waiver. In addition to what is listed below, see pages 31-32 for guidelines on the use of Title I funds.

What does it mean to “supplement not supplant”?

Supplant means to replace, or to be used instead of. Title I funds may not be used to supplant state or local funds for education. All categorical programs must supplement existing state and local fiscal efforts, such as consent decree, and basic funds. This means that you cannot spend these restricted funds on core program.

In what areas can I NOT spend Title I monies?

- Salaries and benefits for teachers of self-contained classrooms (the only exception is class size reduction for 4th/5th grades in SWP schools funded through Title 1-Part A).
- Basic textbooks and supplies generally provided to all students.
- Equipment and special supplies that are provided for use by the whole school and normally provided through the general fund (e.g. sound systems, Promethean boards, VCR, hanging screens).
- Furniture (including stages, risers).
- Food expenses for required meetings, except for parents attending Title I parent workshops.
- Food expenses for staff.

In what areas can I spend Title I monies?

- Professional development that focuses on meeting the needs of identified children. May be delivered via in-house training, an institute, consultant services, or conferences.
- Salaries and benefits for LA Specialist, Math Specialist, paraprofessionals, and family liaisons.
- Stipends for teachers who serve at risk students beyond contract time (zero period, after school, before school).
- Technology and software to support curriculum specifically to meet the needs of the at-risk student in accordance with your site plan.
- Supplementary materials and supplies. Participation in educational experiences appropriate for identified students.

What is comparability or comparable services?

Each student in a school district must receive essentially the same amount of financial support from state and local efforts before any categorical funds can be distributed to any schools in the district. Districts are required to
demonstrate comparability on an annual basis to show that they are not using categorical funds in place of basic funds required to educate the children in the district.

**What is Title I Comparability and why does it apply to all schools even if a school doesn’t get Title I?**

In accordance with the Elementary and Secondary Education Act, our district is required to perform a Title I Comparability calculation every year to demonstrate that each our high poverty schools are equivalently staffed in comparison to our non-high poverty schools. This involves instructional staff only (i.e. classroom teachers, bilingual teachers). We measure Comparability by looking at the ratios of students to staff to ensure the equitable distribution. If sites are not found to meet Comparability, State and Federal Programs will coordinate with site administrators and Budget staff to make the necessary adjustments.

**What are Time Accounting requirements?**

One of the ways the CDE monitors our spending of state and federal funds for salaried employees is through the use of Time Accounting. This is a check of spending to ensure that the activities being performed by staff are supplementary services to our sites and departments. This process documents the work, and provides the evidence we need to produce during annual audits and larger reviews like Federal Program Monitoring (FPM). It is the site administrator or program administrator’s responsibility to ensure that this process is completed for every staff member whose salary is paid from state and federal funds (Title I, QEIA and/or SIG).

Time Accounting falls into two categories: Time and Effort Reports are completed for staff funded from more than one resource and who work toward more than one cost objective. Time Certification Reports are for staff funded from a single resource or who work toward a single cost objective.

Note: If you multi-fund an employee with a federal resource (i.e. Title I), then the Time and Effort reports are required monthly to track daily use of time.

**What are the staff qualifications under NCLB (No Child Left Behind) which affect all schools regardless of funding?**

Title I of NCLB requires that teachers of core academic subjects hired after the first day of instruction of the 2002-2003 school year, and teaching in a program supported with Title I Part A funds, must be “highly qualified” when they are hired. All core academic teachers must obtain NCLB Highly Qualified status by June 30, 2006 for each core academic subject taught. Core academic subjects include: English, Reading/Language Arts, Mathematics, Science, Civics and Government, Economics, Arts, World Languages, History, Geography, and Self-Contained/Elementary Multiple Subjects.

Core academic teachers who have not met the NCLB requirements by June 30, 2006, may be required to develop a plan to become highly qualified. Beginning Fall 2006, federal law requires a letter be mailed to parents of any student enrolled in a core academic class being taught by a teacher who has not received highly qualified status.

Paraprofessionals hired after January 8, 2002, and working in a program supported by Title I Part A funds, must have a) completed at least two years of study at an institution of higher education; OR b) obtained an associate’s degree; OR c) met a rigorous standard of quality and can demonstrate certain skills through a formal academic assessment. Paraprofessionals hired before the date of January 8, 2002 have until June 30, 2006 to satisfy these requirements. ALL paraprofessionals working in a program supported with Title I-Part A funds must have earned a high school diploma or its recognized equivalent. These requirements affect all core academic classes in a school-wide program and in a targeted assistance program. The law exempts paraprofessionals who are employed primarily to provide translation services or solely to provide parent involvement activities.
What is No Child Left Behind (NCLB)?

The No Child Left Behind Act of 2001 amended the Elementary and Secondary Education Act. Three prominent aspects of the law include: First, setting minimum qualifications for teachers in all the nation’s public schools, whether or not the schools receive federal funding; second, establishing a mandatory national deadline (the 2013-2014 school year) for all public schools to bring all these children to an achievement level deemed “proficient” by the state; third, authorizing the use of federal funds for extra tutoring for children in the most troubled Title I schools.

In 2013, Eight school districts in California that are members of the California Office to Reform Education (CORE) submitted a joint request for flexibility with respect to certain requirements of NCLB, in exchange for committing to improve academic achievement and the quality of instruction for all elementary and secondary schools. This joint request is known as the CORE Waiver.

What is the NCLB CORE Waiver?

The CORE waiver calls for a holistic and systemic approach to school improvement built around the right drivers: all students prepared for college and careers, the elimination of disparity and disproportionality on all measures in the academic, social/emotional and school culture and climate domains. In order to meet the approved waiver components, SFUSD will implement the School Quality Improvement System which aims to foster a culture of collaboration and continual improvement at every school and will reorient the work of participating districts so that student success in multiple dimensions is at the center of every decision made and every action taken.

It is important to note that this waiver is not a move away from accountability. Instead, it is a move into a new system, the School Quality Improvement System, with a higher level of shared responsibility and accountability. For SFUSD, this work will be in direct alignment with our three goals of Access & Equity, Student Achievement and Accountability. As we implement the new School Quality Improvement System our work will be focused on key principals that include:

- College and Career Readiness
- Differentiated Recognition, Accountability and Support for Schools
- Supporting Effective Instructional Leadership

The NCLB CORE Waiver does provide relief from some, not all, of the provisions in NCLB. The districts requested waivers of six sections of the Elementary and Secondary Education Act (ESEA) requirements. The six sections include:

- Per ESEA section 1116 (b) take currently required improvement actions for schools when schools are identified for improvement, corrective action or restructuring.
- Per 1116(c)(3) and 1116 (c)(7), take currently required improvement actions in a district when a district is identified for improvement.
- Per ESEA section 1114(a)(1), meet the 40 percent poverty threshold so that priority or focus schools can operate a schoolwide program.
- Per ESEA section 2141(a), develop district improvement plans if a district does not meet its highly qualified teachers (HQT) targets (as a result of this waiver, a participating district will have flexibility in how it uses its Title I and Title II funds with respect to this requirement).
- Per ESES sections 6123(b) and 6123(d)(2), limit the amount of funds a district may transfer from certain ESEA programs to other ESES programs, as well as modify plans related to transferred funds and notify the State educational agency regarding the transfer.
- Per ESEA sections 1113(a)(3)-(4) and (c)(1), serve with Title I funds schools in rank order of poverty.
What does the waiver mean for how our school uses Title I funds?

Title I funds are federal funds. These dollars must continue to be used to provide supplemental services and support to under-performing students. This requirement has not changed. In the BSC, schools are still required to indicate how Title I funds are being used. The requirement to use 1% for parent involvement still remains. The requirement for PI schools to use 10% for professional development is now flexible. Schools may continue to use funds to support PD or they may choose to use funds in another way that supplements services to improve student achievement. Title I schools still must continue to use at least 1% of their Title I funds to support Parent Engagement.

What is Federal Program Monitoring (FPM)?

This is a systematic and coordinated process for reviewing, monitoring, and validating the implementation of categorically funded programs in a district and at school sites and ensure that SFUSD is spending the funding as required by law. A district may be selected for an on-site or online monitoring every two years. The process was formerly called Coordinated Compliance Review (CCR) and Categorical Program Monitoring (CPM). The SFUSD had a CPM review in 2005-2006 and in 2009-2010. In 2011–2012, SFUSD participated in the online FPM review and an on-site review in 2013-14.

What is the Consolidated Application, Parts I and II?

This is the application process by which school districts apply for categorical program funding through state and federal sources. The Spring Release is due to the California Department of Education on June 30 of each year, and the Winter Release is due in January.
Special Education Services

Students requiring special education services are first and foremost general education students. Their success, therefore, is the joint responsibility of all SFUSD educators. Site leaders should carefully consider the following recommendations and compliance requirements in their annual planning.

**Fiscal Responsibility and Funding**

Sites are funded for the provision of Special Education Services to their students through the Weighted Student Formula (WSF) and through central allocation of staff as described below:

**Weighted Student Formula Funds to Support the Provision of Special Education Services**

Given that every student is a general education student, sites should recognize that each student with an IEP contributes to the site’s general WSF funding. In addition, sites receive a supplemental per student amount for each student with an IEP. This amount is a flat amount, regardless of the student’s services or instructional setting (e.g. no difference between related services only vs. separate class setting for the majority of the day). These supplemental WSF funds for Special Education students are intended to cover additional costs related to the provision of special education services, including administrative and staff time, professional development, supplemental instructional materials, curriculum, assessment protocols, additional printing costs, office supplies, and technology for assigned special education staff.

**Centrally Assigned Itinerant Staff**

Sites are assigned the necessary itinerant staff to meet the IEP services of their students by the central Special Education department. Itinerant staff are assigned to sites in varying FTE portions depending upon the needs of each site’s students. Large sites may be assigned multiple personnel, while small sites might be assigned a portion of an employee’s time. Itinerant staff include the following types of personnel:

- School Psychologists – perform assessments, provide IEP services, and participate in Student Success Teams
- Related Service Providers – including Speech Language Pathologists, Occupational and Physical Therapists, teachers for Visually Impaired and Deaf, Hard of Hearing students, Adaptive P.E. teachers, BCBA’s, etc.
- Content Specialists – provide sites with general support for special education, including guidance on services and supports, staffing assignments, compliance matters, as well as coaching and mentoring to all staff.

Although the positions above are funded centrally, the operational needs of these staff members must be provided by the hosting site. For example, the Speech Language Pathologists and Psychologist must have a space to work with a telephone, access to printers, office supplies, etc. Funding for these related costs is included in the per student WSF funds described above. If desired, sites may fund an additional portion of FTE. For example, some sites fund a 0.5 FTE school psychologist in addition to the 0.5 FTE assigned by the central Special Education department. Please work with the relevant Supervisor (e.g. Related Services, Psychological Services) to coordinate the assignment and pairing of positions prior to submitting budget templates.

**Weighted Student Formula Supplement for Certain Types of Separate Classes**

The following types of Separate Classes carry additional costs associated with the higher needs of the typical class:

- Separate Classes for Preschool Students at Elementary Sites: examples of additional costs include instructional materials, toys, diapers, cleaning supplies, gloves.
- Separate Classes for Moderate/Severe students: examples of additional costs include additional instructional materials, specialized furniture, support for daily living skills, community-based education, vocational training, as well as diapers, gloves for medically severe students.
- Separate Classes for Emotional Disturbance: examples of additional costs include specialized furniture, and rewards to encourage behavior modification.
For each class capacity described above, sites will receive an additional $1,000 (approximately $100 per student) as a WSF supplement to offset some of these additional costs.

**Allocation of Teaching and Paraprofessional Staff**
Following the placement of students by EPC, Special Education Supervisors work collaboratively with sites to determine the annual allocation of teachers and paraprofessional positions to support the instruction and case management of each site’s assigned students. While these positions are centrally allocated, the site is responsible for the hiring, assignment, evaluation, and management of this staff. The regular monitoring and evaluation of teachers and paraprofessionals is necessary to ensure quality service to our students. Each site’s spending plan for its WSF should include the necessary professional development, instructional materials, technology, and supplies required by these staff members.

Due to SFUSD’s enrollment system, which includes several assignment rounds, the allocation of Special Education staff is a rolling process, which cannot begin until the results of Round 1 student assignment each spring. Each site’s allocation is evaluated periodically and adjusted throughout the year when significant changes occur in student assignment or individual student needs. Case management assignment determinations are based upon the number of students each teacher can serve. Allocation guidelines are provided in the Special Education Staffing Guide (to be sent to sites in March) which provides detail on the allocation formulas and process.

**Important Considerations for Planning the Delivery of Special Education Services**

*Least Restrictive Environment (LRE).* Pl. 94-142 mandates that “To the maximum extent appropriate, children with disabilities, including children in public or private institution or other care facilities, are to be educated with children who are not disabled, and that special classes, separate schooling, or other removal of children with disabilities from the regular educational environment occur only when the nature or severity of the disability is such that education in the regular classes with the use of supplementary aids and services cannot be achieved satisfactorily."

**School Environment**

- Ensure that students with IEPs are integral members of the school community. Site leaders should take steps to build an inclusive, positive and welcoming environment.
- Students with disabilities should have access to all school activities, with sites providing the appropriate accommodations and modifications to facilitate participation.
- All staff, including general education teachers, need to understand their required participation as a member of an IEP team, and that IEPs are implemented and monitored with fidelity.

**Administrative Support**

- Work closely with the Special Education Supervisor and Content Specialist who support your site. Work together in partnership to continually improve services and promote the least restrictive environment for each student’s success.
- Schedule monthly Special Education meetings attended by the principal, or Assistant Principal, and relevant staff to manage and improve special education services.
- Remember that the Principal or Principal’s Designee is acting as the District representative to ensure a delivery of the services offered in an IEP.
- Provide the necessary space and supplies to support the delivery of services by all assigned staff members, including pull-out spaces for speech services and specialized instruction, office spaces for psychologists, etc.
- Understand the compliance requirements of IDEA and ensure your site has the processes and procedures to ensure compliant delivery of special education services. Examples of areas for improvement across the district that should be addressed in planning:
  - Ensuring staff participation in IEP meetings, including the Transition IEPs that must be held each Spring for move-ups between levels.
Timelines for assessments (annuals and triennials) and all timelines applicable to IEPs

Brown folders are required to be stored in locked cabinet in a locked room. If your site does not already have a locked cabinet, please order one for next year.

A room to hold IEP meetings with all necessary technology. Parents/Guardians must receive a written offer of FAPE and a copy of the Procedural Safeguards at the meeting. Best practice is to have available:

- Two laptops (one for taking notes and one for writing the IEP in SEIS)
- A projector so the team can review simultaneously the notes, goals, progress, etc.,
- A scanner to immediately upload the signature page, Reports of Progress, and other required documents to SEIS
- Access to a printer. To provide the rights to a written (translated if necessary) IEP at the end of each meeting, delivery of regular Reports of Progress on IEP goals, et al.

Pre-referral interventions

According to the law, a student shall be referred for special educational instruction and services only after the resources of the general education program have been considered and, where appropriate, utilized. (30 EC 56303)

- Designate a team who come together regularly to design, implement and track intervention progress at your site (e.g. SST, RtI, SAP team). Ensure that carefully chosen tiered interventions, known to be effective in addressing academic and behavioral concerns, have been implemented with fidelity and documented prior to a referral for a special education evaluation.
- Ensure appropriate interventions are implemented and documented prior to referral of a student who is designated as an English Language learner.
- Review vision and hearing screenings and monitor attendance prior to a referral for a special education evaluation.

Ensure that any verbal request for special education testing by a parent is verified by a staff member, documented in writing, and processed to initiate appropriate procedures immediately. To ensure that the parent receives a timely response; the response must:

- Proceed immediately to the development of an assessment plan; or
- With parent permission, implement pre-referral interventions for 8 to 12 weeks, and then decide; or
- Provide written denial of request, with rationale, in the form of Prior Written Notice.

Identification & Assessment

- Have a system in place to ensure that assessment plans, or Prior Written Notices, are developed and provided to parents within 15 calendar days of receipt of a request for an assessment, and assessments completed within 60 days.
- Monitor requests for assessment and follow up if not the signed assessment plan is not returned.
- Have a system in place to ensure that all assessments in a student’s assessment plan are completed and, reports are translated prior to the scheduled IEP meeting when requested.
- English Learner students are to be assessed in their primary language by staff members who are proficient in the student’s primary language, or with the assistance of a proficient translator.
- Ensure appropriate staff is knowledgeable about the procedures to follow if a parent provides an independent educational evaluation (IEE), or requests an independent educational evaluation at public expense. Results of outside evaluations provided to school staff must be considered in our assessment process. Parents are entitled to an IEE, at district expense, if they object to our assessment.
INDIVIDUALIZED EDUCATION PROGRAM (IEP) DEVELOPMENT

- Have systems in place to ensure that the following considerations are addressed:
  - IEP meetings are held within required timelines;
  - A complete review of the IEP must occur at least every 12 months, with new goals and objectives established;
  - Parents are active members of the IEP team and school sites should plan ahead with enough time to accommodate parent schedules;
  - The rights of parents prior to and during the IEP meeting are respected and enforced;
  - Required IEP team members must attend the meeting; only a parent can excuse a required member of the IEP team. Excusal must be in writing prior to the meeting. Excused IEP team members must send a written Report of Progress to be discussed at the meeting.
  - Required IEP team members (minimally include the special ed. teacher, administrator, and general ed. teacher, also ensuring CLAD, BCLAD, or ELD certification as necessary) are appropriately selected and notified of IEP meetings;
  - IEP team members come prepared for the meeting. If deemed necessary, a pre-meeting should be held.
  - Reports of Progress for all IEP goals must be provided at regular intervals; these reports should be delivered in a manner similar to report cards and mailed to guarantee delivery if necessary;
  - The determinations of the IEP team are accurately documented using SEIS, the web-based IEP system;
  - The Ed Benefit Checklist (located in the SEIS Document Library, Chapter 2) is a tool which should be utilized at every IEP, uploaded to SEIS notes, and included hard copy in the brown file.

- Ensure that the language needs of families are supported as follows:
  - Notices of meeting are in parent’s primary language;
  - Interpretation and translation services are provided when necessary;
  - Parents/Guardians are always provided with a written copy of the IEP at the end of each meeting.
English Learner Pathways and Services

Each California public school from kindergarten through 12th grade with 21 or more English Learners must form a functional English Learner Advisory Committee (ELAC). The ELAC is a committee for parents and other community members who want to advocate for English Learners. ELACs also play a role in the BSC/SPSA process because one of their functions is to advise the SSC on the development of the BSC/SPSA.

Below is a checklist that provides information on membership requirements and responsibilities of the ELAC and funding guidelines for the use of the Supplemental Concentration Grant allocated to sites to provide additional services and support for English Learners.

**ENGLISH LEARNER ADVISORY COMMITTEE (ELAC) CHECKLIST FOR SITES**

| FUNCTION: School has 21 or more English Learner (EL) students and has an ELAC to provide recommendations regarding EL programs and services that are included in the school’s BSC/SPSA and budget. |
| MEMBERSHIP COMPOSITION: |
  | o ENGLISH LEARNER PARENTS are included in the ELAC membership. |
  | o THE PERCENT OF EL PARENTS is at least the same as that of English Learner students at the school. |
  | o EL parent members of the ELAC are not employees of the District, however, employees may be elected as additional parent or community members. |
| ELECTIONS: |
  | o ELACs were usually elected in the Fall or as needed. |
  | o Only parents of EL students voted for ELAC parent and community members. |
  | o Staff members may be appointed by the principal. |
| DELAC REPRESENTATIVE: Each English Learner Advisory Committee (ELAC) elected at least one member to the District English Learner Advisory Committee (DELAC). |
| TERM OF OFFICE: Each term is for 2 years. If there were vacancies during the term, school conducted an election to fill the seats. |
| RESPONSIBILITIES: |
  | o Advises the principal on programs and services for ELs. |
  | o Advises the SSC on the development of the BSC/SPSA and the Supplemental Concentration Grant for English Learners (SCG-EL) budget. |
  | o Assists with school needs assessment and annual language census. |
  | o Builds parent awareness on importance of school attendance. |
| RECORD KEEPING: Keep and maintain file of documents for each meeting including, meeting notice, meeting agenda, meeting minutes and sign in sheet. |
| FOR THE BSC/SPSA: The ELAC provided advice on the development of the Balanced Scorecard/ Single Plan for Student Achievement (BSC/SPSA) including the school budget. There are ELAC minutes documenting the ELAC recommendations. |
ELAC & SSC MERGER: For ELACs that have merged with the SSC, please check to ensure that the following steps were taken:

- After the ELAC has been elected and trained on their responsibilities as a committee, it may relinquish their responsibilities of all tasks required to the SSC or an existing school level advisory committee for up to two years (EC 52870).

- In order to relinquish their duties the ELAC must vote to do so. Once the vote is taken, transfer accepted and recorded in the minutes of both advisory bodies, the transfer of responsibilities is completed.

- The SSC or existing school level advisory committee must fulfill the legal responsibilities of the ELAC including the following:
  - Parents of ELs must comprise, at least, the same percent as the percent of EL students;
  - Review and provide advice on EL program and services i.e., the BSC/SPSA, and budget; and
  - Assist in the development of the school needs assessment, language census and ways to make parents aware of the importance of regular school attendance.

FUNDING RESOURCES FOR ENGLISH LEARNERS

<table>
<thead>
<tr>
<th>Supplemental Concentration Grant for English Learners (SCG-EL)</th>
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</thead>
<tbody>
<tr>
<td><strong>Funding Description</strong></td>
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<tr>
<td><strong>Expenditure Requirements</strong></td>
</tr>
</tbody>
</table>

Examples of Allowable SCG-EL Expenditures

<table>
<thead>
<tr>
<th>Academic Support for Students in dedicated ELD, English Language Arts, Math, Science and Social Studies</th>
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<tbody>
<tr>
<td>- Primary language and supplemental informational texts aligned with the CCSS, instructional materials and equipment for students</td>
</tr>
<tr>
<td>- Additional courses for English Learners to be successful in accessing the core curriculum, including specialized ELD for Long-Term ELs</td>
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<tr>
<td>- Lower class size in ELD and other courses for beginning and early intermediate English Learners</td>
</tr>
<tr>
<td>- Primary language instruction/support, e.g. hire bilingual paraprofessionals to work with English Learners to access the core curriculum</td>
</tr>
<tr>
<td>- Extended hours for teachers or paraprofessionals to offer tutorials after school and in the summer for students needing intensive language instruction</td>
</tr>
<tr>
<td>- EL coordinator for one period a day (secondary schools)</td>
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</tbody>
</table>

Reminder: SCG funds are supplemental. They should not be used to pay for core materials or core staffing.
### Examples of Allowable SCG-EL Expenditures

- Extended day/week/year for targeted EL students
- Targeted intervention to accelerate EL students’ achievement and reclassification
- Support for CELDT and/or reclassification process
- Academic interventions to support students in meeting Benchmarks and reaching grade-level academic proficiency and/or passing CAHSEE

### Support Personnel

- Reading/Math/ELD Coaches
- Bilingual Intervention Teacher
- Bilingual Paraprofessional
- Bilingual Counselor
- Bilingual Community Liaison

### Capacity Building/Professional Development

- Principal coaching/training on meeting the needs of ELs
- Teacher coaching/training on ELD, SDAIE, or primary/pathway language instruction
- Teacher/support, staff stipends, or ECs for professional development
- Teacher substitutes for professional development
- Training materials/resources
- Consultants to support professional development work
- Support staff coaching/training to support EL students and their families
- Conferences/workshops that support school plan goals for ELs

### Parent Engagement

Use of funds for parent engagement should focus on ELAC and other EL parent activities which may include:

- ELAC expenditures (i.e. handouts, translation)
- EL parent training/education opportunities
- EL parent workshops and support materials
- Reasonable costs for refreshments for EL parent activities
- Translation, e.g. stipends for appropriately trained teachers or paraprofessionals who translate for parents outside the regular school day
- Child care for EL parent involvement/education activities
- Communication with EL parents (e.g. newsletters, postage)
Gifted and Talented Education (GATE)

Services for GATE students:
- Support to school site to provide differentiated instruction throughout the school day
- High performing students are clustered with other students in general education, honors and Advanced Placement courses and classrooms.

Principals:
- Conduct site informational sessions on differentiated teaching and learning
- Organize and co-facilitate meetings with parents of GATE identified students
- Cluster high performing/high potential students together in classrooms with other students
- Hire and support teachers who teach to the highest potential of students
- Co-plan high quality differentiated instructional with teachers and parents
- Support all teachers to ensure that they are differentiating the learning process
- Provide ongoing support for teachers in developing and strengthening teacher competencies
- Engage parents in ongoing implementation of a high quality instructional programs

Teachers:
- Assess needs of high performing and GATE identified students
- Co-plan a high quality differentiated instructional program that includes one or more of the following strategies:
  - Extended learning activities, independent study;
  - In-depth, complex, novel projects and assignments
- Participate in professional development designed to meet the needs of high performing and GATE students
- Encourage parents to participate in site and district-wide parent meetings

GATE Coordinators:
- Attend District GATE Coordinator meetings
- Meet with faculty to explain Gifted and Talented Education
- Share site’s differentiation practices in school bulletins, on-site bulletin boards; be certain all parents are informed of differentiation practices and how students are identified
- Provide workshop for faculty on differentiating instruction and learning for all students
- Attend SSC meetings in order to describe the differentiation and seek additional funds for GATE at the site

Parents:
- Participate in the planning of GATE on site; attend parent meetings to discuss and advocate for the high performing students
- Help write newspaper and bulletin articles about GATE at your school
Indicators of Giftedness Among English Learner Students:
Proficiency in English is not a requirement for English Learners to be eligible for GATE. Teachers can use the following indicators of giftedness to refer English Learners for GATE.

Language Indicators:
- Rate of language acquisition
- Gains between assessments
- Manipulation of either language
- Ability to conceptualize in either language
- Advanced vocabulary in either language
- Advanced ability in code-switching

Non-traditional Indicators:
- Responsibility
- Service
- Resilience
- Adaptability
- Acculturation rate
- Ambition
- Risk-taking/Leadership
- Perseverance
- Conceptualization
- Intuition
- Hypersensitivity
- Metacognition (verbalization of thinking)
- Concrete/abstract movement

Source - [https://www.ocps.net/.../gifted/.../Identifying%20Our%20Gifted%20Learners.pdf](https://www.ocps.net/.../gifted/.../Identifying%20Our%20Gifted%20Learners.pdf) - Orange County Public Schools, Identifying Our Gifted Learners

Additional Areas to Strengthen the GATE Identification Process of English Learners:
- Assessments in home language
- Teacher input, including art and other content area teachers
- Accelerated progress on assessments

Monitoring English Learners’ Access to Differentiated Learning:
- Site GATE Coordinators will gather data from classroom teachers


Be proactive and supportive of your programs!
Appendix A: SUGGESTIONS, EXAMPLES & EXEMPLARS for BSC Addendum

We hope you find this collection of suggestions, examples and exemplars helpful. In many cases, examples & exemplars have been taken from existing plans. Suggestions have been provided by departments and other site support teams. They are meant to guide and inform your thought process, but not to replace it.

Please contact State & Federal Programs with any questions or additional assistance you may need in completing your BSC Addendum, or with the School Planning Process in general.

Dr. Roderick Castro  
castror@sfusd.edu  
415-379-7618  

Mary Elsalde  
elisaldem@sfusd.edu

SECTION I: SCHOOL VISION AND EXECUTIVE SUMMARY
PROMPT: Please include salient points from your SARC School Vision and complete an Executive Summary for your school site. Include the following components:

EXEMPLARS

Elementary School Level

The mission of our school is to build a population of lifelong learners, who think critically and express themselves artistically. With the support of teachers, parents and the school community working together, students will acquire the necessary knowledge, high level thinking, and social / personal skills needed to enable them to become productive, contributing members of society. Our motto is “Together We Can Make A Difference!”

Our Elementary School is located in the outer mission district, providing public education for over 600 students who live in the surrounding community in San Francisco. We are a school with a culturally diverse student population and staff. Our diverse students reflect the neighborhood demographics consisting of 40% Latino, 22% Chinese, 32% Filipino, 4% African American, 2% Pacific Islander. Longfellow offers unique language pathways for students in Spanish biliteracy, and Filipino FLES, Foreign Language and Enrichment in Elementary Setting. We are a school-wide Title I school, serving 80% of our student who are socioeconomically disadvantaged, and 60% are identified as English Language Learners. Our parent community is involved in our school by regularly attending our various family education functions and student celebrations. Teachers use a variety of instructional strategies to fit the needs of our diverse students. Students, parents and staff work cooperatively to sustain a positive school climate.

Our Instructional Leadership Team and staff have identified the following high-leverage instructional strategies as daily components that compliment our comprehensive approach to balanced literacy. In addition to implementing the Balanced Literacy approach to language arts instruction, teachers at Longfellow are committed to the following school-wide agreements of:

Children as Authors-Writing Workshop Daily
Structured Oral Interactions and Academic Discourse  
Graphic Organizers and Visual Supports  
Collaborative practice/skills of team work

Students engage regularly in small group inquiry, discussions and activities designed to promote building on each other's ideas, share and integrate information, and build skills of working together to achieve an academic purpose. These collaborative practices include partner reading, book clubs, guided reading, and small group strategy work in language arts.

---

Middle School Level

Our Middle School is a school on the move. Over the course of the last 5 years, we've tripled our proficiency rates in Mathematics and doubled our proficiency rates in English Language arts. We have been the fastest growing middle school for three years in a row now. All learners benefit from our rigorous level of instruction, and our English Learners in particular benefit from double-blocks of English Language Development and Structured English Immersion classes. We continue to work to close the achievement gap between our English Learner students and our other students. We have reduced suspensions and referrals overall, however our African American students are still overly represented in office referrals and suspensions. Our key approaches to this work include the Response to Intervention framework, the Balanced Literacy approach, focusing on structured academic conversations (SAC), and student metacognition and reflection.

---

High School

High School Working Mission and Vision

Working Mission

Our High School is a Community School at which each student will be prepared to achieve their goals and dreams as individuals and to positively contribute in their communities as world citizens.

Working Vision

We will achieve our mission by using an Anti-Racist Teaching framework to

- ensure critical thinking and literacy instruction that is school-wide (in every classroom, across all curriculum), uniform, systematic and standards-based
- nurture and develop a connected and unified community through strong personal relationships between faculty, students and community, intended to support each student to be academically successful and socially responsible, and
- identify and support a high caliber staff of committed and hard working professionals who engage in conscious, intentional and ongoing analysis of our student achievement data, Anti Racist Teaching, and school systems.

CONTINUED - ESLRs (Student Learning Outcomes)

Every Graduate will be...
A Complex Thinker
Prepared for post-secondary endeavors
An Engaged, Open-Minded and Tolerant Community Member
Technologically Skilled

School-wide Priorities (through Anti-Racist Teaching Lens)
This 3-point plan allows us to develop very focused and intentional programs and supports for all of our students.
1. Analyzing Student Work in collaborative Teams and Departments
2. Family and Community Engagement
3. Post-Secondary Success

SECTION II:
SCHOOL-WIDE ANALYSIS

For this section, the following example represents a “narrative” approach to discussing data patterns/trends and the analysis. To make this section more user-friendly to stakeholders, and as practical next step in the ROCI/reflective process, you are encouraged to use a more conversational methodology to describe data trends/patterns, and the subsequent analysis, instead of just using bullets or data points aligned to quantitative goals.

Here are two examples, using the areas of Challenging Curriculum & Engaging Instruction: Closing The Achievement Gap: English Learners and Student-Centered Learning Climate:

EXAMPLE

1. Challenging Curriculum & Engaging Instruction

CLOSING THE ACHIEVEMENT GAP

Significant Student Group refers to any group with 20 or more members at your site.

<table>
<thead>
<tr>
<th>Significant Student Group</th>
<th>Data Patterns/ Trends</th>
<th>Analysis of Results</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>There was a trend in the data when the team looked at how ELs and Sped students were doing compared to the whole group in meeting end of the year benchmarks for reading. In the primary grades, the ELs students were performing about the same as the overall student population</td>
<td>More focused attention needs to be given to ELs and sped students in reading in tier 1 instruction in the classroom and as we identify students for interventions during and outside of the school day.</td>
</tr>
</tbody>
</table>
for the grade. Starting in 4th grade, that trend changes. In 4th, 69% of ELs had not yet met the benchmark compared to 40% overall. This percentage moved to 60%, 83% then 95% of the ELs not meeting benchmark as they got older, while the overall population not meeting benchmark stayed around 30-40%. Sped students also had low percentages of meeting the benchmark goals compared to the overall population, ranging from 100% not meeting benchmark to 67% not meeting benchmark.

2. Student-Centered Learning Climate

STUDENT ENGAGEMENT AND SCHOOL CLIMATE

<table>
<thead>
<tr>
<th>Data Patterns/ Trends</th>
<th>Analysis of Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>There are trends in families where, for example, three boys in a family will all be in highly referred. Some students are being referred for minor offenses, others for more major ones. There are more boys being referred, although the group didn’t crunch that data specifically. Some teachers give more referrals than others. There also didn’t appear to be consistency with consequences.</td>
<td>We need to ensure that we understand when to give an office referral and when to handle something in our classrooms. We will engage in that work through school wide Behavioral RTI this year.</td>
</tr>
</tbody>
</table>

For schools involved in School Quality Pairing/CoP work, the following guidance might be helpful in this section.

Information included in the Data Trends /Patterns can be what schools are articulating as they work their way through the PDSA/ROCI cycle. As part of that process, schools are looking at that data and identifying trends as well as analyzing the information that they are getting through that work. As applicable, this language could be included in any of the four sections, Challenging Curriculum, Student-Centered Learning Climate, College & Career Readiness or Parent-School-Community Ties: Here is an example:
2. Challenging Curriculum and Engaging Instruction

<table>
<thead>
<tr>
<th>Data Patterns/ Trends</th>
<th>Analysis of Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within our African American population in our school, there are some students who haven’t made the expected grade level progress for their Fountas and Pinnell reading level. (some quantitative measures may be appropriately included here.)</td>
<td>To address this issue (our Problem of Practice), we will provide Tier 2 small group reading intervention to a cohort of African American students using the Fountas and Pinnell intervention reading program, Leveled Literacy Intervention. We will also provide access to an online reading program the students can use independently through the online program Reading A-Z and provide students with an extended day art and self-esteem club.</td>
</tr>
</tbody>
</table>

SECTION III:
CHANGES TO BALANCED SCORE CARD/ SCHOOL PLAN
REMEMBER, IF CONTINUING ON YOUR EXISTING PLAN FOR ANY OF THESE IS THE BEST OPTION, YOU CAN PUT “CONTINUE WITH EXISTING PLAN”.

SUGGESTIONS

1. Challenging Curriculum and Engaging Instruction (Includes Tier 1 and Differentiated Access)

<table>
<thead>
<tr>
<th>Plan Component</th>
<th>Updates/Revisions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Language Arts</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Based on our analysis, we will add an Instructional Reform Facilitator/Literacy Coach.</td>
</tr>
<tr>
<td></td>
<td>• Targeted professional development for English Language Learners and students with IEPs, and differentiate instruction within the core, supporting literacy and/or English language development by attending to the CA ELD Standards and the Universal Design for Learning (UDL) model.</td>
</tr>
<tr>
<td></td>
<td>• Professional development on academic conversations to deepen student understanding and perspectives, and their ability to conduct close readings of complex texts to uncover both meaning and craft, and produce writing using evidence from texts to tell a story.</td>
</tr>
</tbody>
</table>
(narrative), build an opinion and/or explanation.

- Increase in the training/ consistent usage of formative assessment to inform instruction and identify needed differentiation.
- Offering an elective Accelerated Literacy Course.
- Provide release time for teachers to observe each other using the CCSS ELA Informal Evidence Collection Tool.
- Teachers will collaboratively revise grade level curriculum maps, unit and lesson plans for each of the SFUSD ELA PK-12 Scope and Sequence Spirals.

**MATHEMATICS EXEMPLARS & GUIDANCE**

**Tools:** These products may be used within Core Curriculum lessons as manipulatives to support conceptual learning. We feel that these tools modify or redefine the way that students interact with math (SAMR model).

**Supplemental Curriculum:** These products can be used to add or replace lessons (though not tasks) within the Core Curriculum, so long as the standards addressed match.

**Differentiation and Practice:** These programs may be used for time beyond that devoted to the Core Curriculum to address student needs in math. They could also be accessed from home.

<table>
<thead>
<tr>
<th></th>
<th>ELEMENTARY</th>
<th>MIDDLE SCHOOL</th>
<th>HIGH SCHOOL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tools</strong></td>
<td>Conceptua Math Tools (free)</td>
<td>Desmos (free) Geogebra (free) Geometer’s Sketchpad Tinkerplots Tuvalabs (free)</td>
<td>Desmos (free) Geogebra (free) Geometer’s Sketchpad Tinkerplots Fathom (free) Tuvalabs (free)</td>
</tr>
<tr>
<td><strong>Supplemental Curriculum</strong></td>
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<td>Mathalicious</td>
<td>Mathalicious</td>
</tr>
</tbody>
</table>
### Differentiation and Practice

<table>
<thead>
<tr>
<th>Differentiation</th>
<th>Dreambox</th>
<th>Dreambox</th>
<th>ALEKS</th>
<th>ALEKS</th>
</tr>
</thead>
<tbody>
<tr>
<td>and Practice</td>
<td>ALEKS</td>
<td>ALEKS</td>
<td>EPGY</td>
<td>EPGY</td>
</tr>
</tbody>
</table>

Products **in bold** are highly recommended.

**ELEMENTARY SCHOOL:**

- **Tools:**
  - Conceptua Math Tools (free): These free online tools support conceptual learning about fraction concepts and procedures.
- **Supplemental Curriculum:**
  - Conceptua: This program includes teacher-guided lesson Openers and Closers, individualized student Guided Lessons, and other tools to support conceptual learning about fraction concepts and procedures.
- **Differentiation and Practice:**
  - Dreambox: This web-based software in English or Spanish that differentiates content, pace, and sequence. This addresses a number of SFUSD priorities including differentiating instruction to meet all student's needs, alignment to common core goals in math, alignment to contexts for learning and work done by Cathy Fosnot with a focus on conceptual understanding in addition to fluency and helping to “fill in gaps” and accelerate learning to help support existing core math curriculum.

**MIDDLE SCHOOL:**

- **Tools:**
  - Desmos (free): This online graphing program replaces graphing calculators and provides a variety of other functionalities. Teachers can create a free account to access further tools.
  - Geogebra (free): This dynamic geometry software allows students to construct, measure, and manipulate geometric figures, and to explore the connection between geometric and algebraic representations.
  - Geometer’s Sketchpad: This dynamic geometry software allows students to construct, measure, and manipulate geometric figures and function plots. Teachers can also create or use prepared visual models for students to investigate other topics such as place value and fractions.
  - Tinkerplots: This exploratory data analysis and modeling software designed for use by students in grades 4 through 10 to visualize and manipulate data and build probability simulations. Does not work on iPads.
○ Tuvalabs (free): data sets on a platform to analyze, visualize, and interpret real data on a dynamic, web based format. It has much of the functionality of Tinkerplots and works on iPads as well as desktop computers.

- Supplemental Curriculum:
  ○ Mathalicious: Mathalicious provides real-world contexts for deep math learning. Lessons include teacher lesson-plans, student sheets, and online videos. Its problems are featured in many of our Core Curriculum Units.

- Differentiation and Practice:
  ○ Dreambox: This web-based software in English or Spanish that differentiates content, pace, and sequence. This addresses a number of SFUSD priorities including differentiating instruction to meet all student's needs, alignment to common core goals in math, alignment to contexts for learning and work done by Cathy Fosnot with a focus on conceptual understanding.
  ○ ALEKS: is an web-based program from Harcourt Brace that includes practice problems in mathematics. It also provides individualized assessments and math fact practice.
  ○ EPGY: is an web-based program from Stanford that includes practice problems in mathematics. It also provides individualized assessments and math fact practice.

HIGH SCHOOL:
- Tools:
  ○ Desmos (free): This online graphing program replaces graphing calculators and provides a variety of other functionalities. Teachers can create a free account to access further tools.
  ○ Geogebra (free): This dynamic geometry software allows students to construct, measure, and manipulate geometric figures, and to explore the connection between geometric and algebraic representations.
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  ○ Fathom: This dynamic data software allows students to
visualize and manipulate data, perform statistical analysis, and build probability simulations.

- **Supplemental Curriculum:**
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**SCIENCE EXEMPLARS & GUIDANCE**

**ELEMENTARY**

**INTEGRATING SCIENCE INSTRUCTION WITH THE CCSS ELA (K-5)**

- Provide teachers with professional training to teach science and language arts at the same time in the elementary classroom and save planning and instructional time. Professional developments walks teachers through a hands-on activity with corresponding essential language arts tasks, and hit multiple CCSS and NGSS (Next Generation Science Standards) standards together. User-friendly planning tools to integrate and implement science and literacy in the classroom will be provided.

**GETTING TO KNOW THE NGSS SCIENCE AND ENGINEERING PRACTICES (K-5)**

- **Description:** How do we help students develop scientific habits of mind, to think, communicate, and act like scientists? Teachers will be introduced to the Next Generation Science Standards and learn one of the three dimensions, Science and Engineering Practices, through a series of hands-on and interactive activities. They will receive lesson-planning resources to intentionally build Practices into their science classroom. Duration of this workshop is preferably two hours but can be shortened to meet your needs.

**ACADEMIC LANGUAGE DEVELOPMENT AND SCIENCE**

- Provide elementary teachers with professional development on how to build academic vocabulary during science investigations using the science notebook. Scaffolding for science writing will also be an area
of focus. Teachers will be provided with resources to effectively achieve science learning goals and academic language development during the limited instructional day. Duration of this workshop is between one to two hours and can be tailored to meet your needs.

- **USING SCIENCE NOTEBOOKS TO ENHANCE LITERACY SKILLS (K-5)**  
  *Description:* Using science notebooks in the elementary classroom can develop a student’s science content knowledge while building essential literacy skills. Additionally, science notebooks can be used to guide instruction and facilitate collaborative reflection. During two one-hour sessions, teachers will learn the rationale for using Science Notebooks, will engage as learners in the creation of a science notebook and take away strategies they can use with their students the next day.

- **INTRODUCTION TO FOSS AND PLANNING FOR SCIENCE (K-5)**  
  *Description:* This one to two hour session is a very basic introduction to the FOSS Curriculum, including the scope and sequence, teacher guide layout, and lesson components. We will also lead teachers in a hands-on FOSS investigation. This session could be tailored to focus on Earth, Life or Physical science, depending on the needs of your staff. This session works best when paired with Science TSA facilitated grade-level planning.

**MIDDLE AND HIGH SCHOOL**

**SITE-BASED PROFESSIONAL DEVELOPMENT**
*All site-based professional development can be designed to fit your staff development time*

- **GETTING TO KNOW THE NEXT GENERATION SCIENCE STANDARDS (NGSS)**  
  *Description:* Provide middle and high school Science teachers with an understanding of the Next Generation Science Standards. This school based professional development is designed to introduce your science teachers to the NGSS content shifts, three dimensions, an introduction to the Science and Engineering Practices, and the implementation timeline. (2-3 hours)

- **NGSS – GOING DEEP INTO PRACTICES AND CROSS-CUTTING CONCEPTS** - This professional development is designed for science teams who have already developed an awareness of the NGSS and are ready to dive deep into the
### Practices and the Cross-Cutting Concepts

Teachers will develop a deep understanding of these concepts and begin to incorporate them into their teaching practice. (4-6 hours)

- **CCSS INTEGRATION – ADDRESSING THE SCIENCE LITERACY STANDARDS** - Provide middle and high school Science teachers with the opportunity to explore the Common Core Literacy Standards for Science. This school based professional development is designed to introduce your science teachers to the CCSS literacy standards, plan and implement opportunities for reading, writing, speaking, and listening in the science classroom, and examine student work from implemented lessons. (3-4 hours - at least two sessions)

- **SUPPORTING ENGLISH LANGUAGE LEARNERS IN THE SCIENCE CLASSROOM** - Provide middle and high school science teachers with professional development on supporting English Language Learners in science using the new English Language Development Standards. To include assessments, academic language support, and sharing of best practices. Presented in collaboration with Multilingual Pathways Department. (2-3 hours)

### Additional Supports for English Learners

- School provides teachers with the SST process for ELs when it is necessary informed by data;
- School pays a close attention to SCG-EL funding and establish clear goals on how to allocate the funding for EL support and services;
- School plans for teachers’ Professional Development on Designated and Integrated ELD with next step;
- School hires Family Liaisons that support the home language of ELs and bridge the communication gap between school and home;
- School actively utilizes district’s Interpretation and Translation services available for PTA (PTO), SSC, ELAC, and other meetings;
- School purchases computer-based interactive educational program (Name: ________) to support the (LTE, Newcomer, or ELs at risk for becoming LTEL)

### 2. Student-Centered Learning Climate

<table>
<thead>
<tr>
<th>Plan Component</th>
<th>Updates/Revisions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Student-Centered Learning Climate</strong></td>
<td><strong>SUGGESTIONS</strong></td>
</tr>
<tr>
<td><strong>Student Centered Climate</strong></td>
<td>Student Centered Climate: Our school is working hard to adopt a positive behavior Incentives and supports structure that includes meaningful student and family input. Our goal is that all students and staff will know the behavioral expectations and how they are manifest</td>
</tr>
</tbody>
</table>
in all times and spaces in the school day. Very importantly, adults and peers will consistently reinforce students when they follow the expectations and show good citizenship and leadership. In order for this to happen our staff will teach and model behavioral expectations throughout the year and adopt the “schoolbucks” incentive ticket system to reward students for on task behaviors.”

- Discipline Flowchart outlining the specific behaviors that should be managed in the classroom and those that warrant an office discipline referral with specific methods to document each.

- Other examples of school-wide policies, protocol and programs which promote positive reinforcement for demonstrating desired behavior expectations, will contribute to creating a culture at our school that is safe, consistent, predictable, and positive for all students.

| Reducing Significant Disproportionality | Our staff will work together to make sure that we are reinforcing positive behavior amongst these students at a higher rate than the rest of the population.
- Continually examine our universal screener data, our attendance data, our out of classroom referral (CORF) data and our intervention tracking data, (BASIS) to make sure that we are addressing disproportionality in all these areas.

3. College & Career Readiness

| Plan Component | Updates/Revisions
SUGGESTIONS |
---|---|
College and Career Readiness | ELEMENTARY Career and Life Skills
- College going culture activities – college pennants, posters, college t-shirt day, etc.
- Use of CCSS college and career anchor standards
- School sponsored career day
- Reports/Units focused on a career of interest
- Career guest speakers, field trips with career emphasis
- College visits or fairs
- STEM opportunities
- Technical learning opportunities to create multimedia or digital projects
- Summer enrichment or STEM opportunities
Global, Local and Digital Identity

- Use of multiple languages and/or cultures in academic projects
- Notable diversity projects
- Notable global or local activities:
- Notable use of technology in academics or projects

Leadership, Empathy and Collaboration

- School activities that include leadership opportunities
- Teaching collaboration skills in a department (CCSS math) or project (3rd grade social studies class creates historic newspapers)
- Empathy training or activities (example: restorative justice, Second Step)

Creativity

- VAPA opportunities
- Design thinking courses, or use of design thinking in a department or project
- Technical tools (MS Office) to communicate ideas or create productions
- Unique school opportunities such as a Makers Faire or coding challenge

Sense of Purpose and Sense of Self

- Mindfulness programs
- Mentorship programs
- SEL (social emotional learning) programs (Second Step)
- School sponsored activities focused on local or global purpose:
- Dispositions/habits of mind/21st century skills incorporated in classes or projects.
- Community service opportunities
- Identify ways teachers can incorporate learning skills such as goal-setting, time management, grit
- Coordination with CBOs

MIDDLE (ALL ITEMS ABOVE AS APPROPRIATE, PLUS)

Career and Life Skills

- AVID participation – number of students, demographics, grades
- AVID participation – teachers incorporating AVID strategies into their subject classrooms
- 6th grade bridge participants
- Notable activities in global, civil, environmental, financial, health or media literacy
- Intentional school-wide focus on GPA
- Technical learning opportunities to create multimedia or digital projects

HIGH SCHOOL (ALL ITEMS ABOVE AS APPROPRIATE, PLUS)

Career and Life Skills
• Access to college and career courses for enrichment or remediation
• Dual credit/concurrent enrollment opportunities as relevant & available
• Focus on number of students with college and career plan
• Use of CCSS college and career anchor standards
• CTE – various academies
• CTE – summer WBL; industry certifications;
• Strategic use of College and career resource center, monitoring of number of visitors

<table>
<thead>
<tr>
<th>4. Parent - School - Community Ties</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Plan Component</strong></td>
</tr>
</tbody>
</table>
| Implementation of the Family Engagement Standards | Regular attendance at meetings by representative parent and community populations.  
Improved participating at ELAC and other advisory councils  
Strengthened relationship between advisory and decision-making councils  
Improved communication among and between teacher/leader and governance committees  
Increased staff participating in parent/community activities |
| Deepening a Community Schools Approach | Increased parent to parent outreach will provide a community of trust,  
Focus on increased parent civic engagement, to include ride share, food delivery, fundraising  
Strengthening engagement practices between parents and staff to support and embrace languages, experiences and cultures, so that parents will be empowered to become better advocates for their children.  
Connecting family resources, inside and outside of school |

For schools involved in School Quality Pairing/CoP work, the following guidance might be helpful in this section.

Referring back to your problem of practice (if still relevant) or wherever you might be in your ROCI/PDSA Cycle, what updates/revisions should be made to your existing plan to address the target population you have selected? Your
School Quality Pairing/CoP work might also yield information that would be better represented in the School Climate section. Include that information here. Here is an example:

1. Challenging Curriculum and Engaging Instruction (Includes Tier 1 and Differentiated Access)

<table>
<thead>
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<th>Plan Component</th>
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<td></td>
<td>program Reading A-Z and provide students with an extended day art and self-esteem</td>
</tr>
<tr>
<td></td>
<td>club.</td>
</tr>
</tbody>
</table>

SECTION IV:
MID-PLAN CHANGES TO SCHOOL BUDGET AND RESOURCE PRIORITIES
EXEMPLARS

<table>
<thead>
<tr>
<th>Site-Based Resources</th>
<th>Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Funds Designated to Support English Learners</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LCFF Supplemental Concentration for English Learners (SCG-EL)</td>
<td>$37,100</td>
<td>We will be funding 0.2 FTE for the Newcomer ELD class as well as 0.25 FTE of a Spanish-Speaking Student Advisor as well as $4,674 for supplies specifically for our ELD students.</td>
</tr>
<tr>
<td>Funds Designated to Support Students Identifying as Low-Income</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LCFF Supplemental Concentration for Students Identifying as Low-Income (SCG-LI)</td>
<td>$55,237</td>
<td>We will use $51,457 to lower class size in 8th Grade ELA through an additional teacher’s salary, and use $3,780 to purchase supplies supporting our low SES students.</td>
</tr>
<tr>
<td>Funds Designated to Support Students with Disabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>WSF-Special Education</td>
<td>$4,500</td>
<td>As we continue to build our SPED programs and inclusive practices throughout our classrooms, this $4500 will be earmarked to supplement sensory materials and supplementary curriculum and technology supports to meet the needs of all SPED students throughout the building.</td>
</tr>
<tr>
<td>Funds Designated to Support Special Populations, including English Learners, Students Identifying as Low-Income and Foster Youth</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LCFF Concentration Allocation</td>
<td>$7,500</td>
<td>Our concentration allocation will be used to partially fund a reading intervention teacher designed to help EL second graders transition into English literacy. We have found that without a targeted support to do this, many</td>
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</tbody>
</table>

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struggle to make the transference.

| Title I | $129,436 | $90,810.00 for support staff salaries and benefits (1.0 additional counselor)  
$20,195.00 for professional development  
$10,859.00 for classroom instructional supplies  
$2,568.00 for certificated extended hours  
$3,710.00 for other supplies |
<table>
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</tr>
</thead>
<tbody>
<tr>
<td>Title I 1% for Parent Involvement</td>
<td>$1,294</td>
<td>Parent Engagement – instructional technology (for parent usage) and supplies for parent workshops, back-to-school night, Principal Chats, community meetings, multicultural events, and awards ceremonies</td>
</tr>
</tbody>
</table>
| Targeted Instructional Improvement Block Grant (TIIBG) | $97,578 | $23,07 for technology upgrades for classrooms, other instructional supplies as appropriate.  
$72,371 will go toward a 0.5 literacy coach and an upper grade class size reduction teacher. |

**Funds Designated for Class-Size Reduction**

| QEIA | $65,000 (projected carryover) | Will continue to use the QEIA funds to support professional development efforts, materials and supplies and part of an FTE to continue class size reduction in the 4th grade:  
$44,000 0.5 FTE  
$10,000 contract for additional PD in academic language in Math  
$11,000 supplemental materials and supplies |

For schools involved in School Quality Pairing/CoP work, the following guidance might be helpful in this section.

**Framing:**
The School Quality Pairing/CoP work and process of engaging in reflective cycles PLCs/ROCI/PDSA are existing & ongoing district practices.

Referring back to Section II in the Budget Narrative that each participating school prepared for the 14-15 School Quality Pairing/CoP Set Aside funding, that information is exactly what would go into this section, for Other Funds, on The Addendum. Here is an example:

**Other Funds**

| Title I – Set Aside for CORE Pairing & School Based Interventions | $15,000 | $10,000 for Instructional Technology - to support an online reading program the students can use independently.  
$5000 for Mentoring Program - We plan to implement a |

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| meaningful and engaging instructional program aligned to the Common Core State Standards to produce high levels of learning in our diverse students, specifically our African American students. Each student will have an afterschool mentor who guides him or her through the reflective part of the “check in check out” routine and builds a relationship with the student to positively impact their socio-emotional and academic growth. |
Appendix B: Resources for Community and School Site Council Meetings

This section provides resources to assist School Site Councils in effectively completing the Balanced Score Card Planning process. The intent of these tools is to support SSCs to have an inclusive and thoughtful planning process.

The following resources are included in this section:

- School Site Council membership checklist
- Guidelines for Facilitating Community Meetings
- Sample Community Meeting Agenda
- Small Group Activity
- Sign-In Sheet
- Childcare Sign-In Sheet
- SSC Process Checklist: Community Meeting
- SSC Observer Checklist: School Site Council Meeting
School Site Council Membership Checklist

Each school is required to have an elected School Site Council (SSC) to represent parents, students, school staff and the community in the school governance process. The principal and the SSC are the key leaders in the BSC/SPSA process. It is very important for SSC membership to meet parity requirements. Parity is required by Education Code (EC 52852) and to ensure a balanced voice in the BSC/SPSA process.

The checklist below provides information on membership requirements and responsibilities of the SSC.

**SCHOOL SITE COUNCIL (SSC)**

- **FUNCTION:** School has a SSC to develop, monitor and evaluate Balanced Scorecard (BSC)/Single Plan for Student Achievement (SPSA).

- **MEMBERSHIP COMPOSITION (PARITY REQUIREMENTS):**
  - **THERE IS AN EVEN NUMBER OF SSC MEMBERS** (minimum of 10 for elementary and 12 for secondary). This number does not include alternates.
  - **HALF OF SSC MEMBERSHIP** is school staff:
    - One member is the principal
    - Classroom teachers comprise the majority of the staff membership
    - There is representation from non-classroom personnel
  - **HALF OF MEMBERSHIP** is comprised of parents and/or community members & students.
  - **FOR SECONDARY**, there are equal numbers of parents (or other community members) & students.
  - Employees who are parents/guardians can serve as elected staff representatives if their child attends the same school at which the parent/guardian is employed. Parents/guardians can serve as elected “parent” members if their student attends a school other than the school at which the parent/guardian is employed.

- **ELECTIONS:**
  - SSCs were elected in the fall or spring, depending on bylaws.
  - **TEACHER MEMBERS** were elected by their peers.
  - **PARENT/COMMUNITY** members were elected by their peers.
  - **STUDENT MEMBERS** were elected by their peers (secondary only).

- **TERM OF OFFICE:** Each term is for 2 years (as stipulated in bylaws). If there were vacancies during
the term, school conducted an election to fill the seats or moved their previously selected alternates into the open positions.

<table>
<thead>
<tr>
<th>RESPONSIBILITIES:</th>
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<tbody>
<tr>
<td>o Establish and maintain bylaws.</td>
</tr>
<tr>
<td>o Maintain records (e.g. elections, official correspondence).</td>
</tr>
<tr>
<td>o Establish and regularly review Parent Involvement Policy and Home-School Compact (required for Title I schools).</td>
</tr>
<tr>
<td>o Develop, monitor and evaluate Balanced Scorecard/Single Plan for Student Achievement (BSC/SPSA).</td>
</tr>
<tr>
<td>o Get input from other advisory councils and committees.</td>
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</table>

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<tr>
<th>RECORD KEEPING:</th>
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<tbody>
<tr>
<td>Keep and maintain file of documents for each meeting including, meeting notice, meeting agenda, meeting minutes and sign in sheet.</td>
</tr>
</tbody>
</table>

<table>
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<tr>
<th>FOR THE BSC/SPSA:</th>
</tr>
</thead>
<tbody>
<tr>
<td>There are SSC minutes documenting that the ELAC recommendations were provided to the SSC during the BSC process.</td>
</tr>
</tbody>
</table>
Guidelines for Facilitating Community Meetings

How to increase clarity at information sharing meetings

☑ Present information in multiple formats to increase retention and address different communication styles and language diversity.

☑ Ensure effective language interpretation as needed; explain all educational jargon/acronyms; constantly check for understanding about the requests for feedback.

☑ Allow equitable time for people to ask questions and/or express ideas in both small and large groups. Specify the ideal amount of time per topic and monitor turn-taking.

☑ Ask people for written and/or verbal feedback about what was clear about your messages and what questions they have that are still unanswered, or issues/solutions they have that they feel still needed to be recorded.

Break-Out Model: Guidance for Facilitators

You have an important role as a break-out group facilitator. In your group you will:

☑ Help the school gather important input from parents and community members.

☑ Help group members feel comfortable sharing their ideas.

☑ Keep the group focused on the task at hand.

☑ Ensure that recorders accurately transcribe people’s comments.

Here is what you should do when you are in your group:

1. **Introduce yourself and your recorder.** Explain your role in accurately gathering input and making sure everyone has an equitable opportunity to speak.

2. **Ask participants to introduce themselves.** Go around the group asking each participant to introduce himself and give his children’s grade level.

3. **Pass out handouts.** Quickly review the expected Agreements (e.g. active listening)

4. **Consider using the “additional requests” process.** Hold up the cards/post-its that list requests identified by parents and other stakeholders. Frame the conversation through targeted questions about the BSC/SPSA. Explain that some people may have issues or concerns that go beyond today’s conversation. Point to the Additional Requests poster and clarify that anything raised today, beyond the scope of the BSC/SPSA, will be forwarded to the SSC. Participants should write their requests, and possibly their name and children’s names, and their phone number on the card. Explain that because time is short, you might ask a participant to put comments in the Additional Requests to stay on topic with the BSC/SPSA. Remind participants this will help us stay focused on our task of getting ideas to make our school a better school for our children.
5. **Discuss each question.** To begin, read the question and ask if anyone would like to ask for clarification about the question. Facilitate the conversation by:

- Keeping track of **who has NOT shared/commented** so you can return to that person and ask if he/she has something to add.

- Repeating/paraphrasing what each person has commented to simplify it for **your recorder**; ensuring the recorder is keeping up; asking participants if what the recorder has written is accurate.

- Asking the recorder to make note of **how many people agree** if more than one person makes the same comment.

- Monitoring if someone is **talking more than others**; reminding everyone of the importance of ensuring everyone has a chance to talk. (Considering stating: “What you are talking about is very important. Please record the details on the Additional Requests poster so that everyone can have a turn to speak. We’ll make sure the recorder has listed the main idea of your comment before we move on to someone else.”)

- Using the Additional Requests poster to indicate its importance and cards if there are **issues** that are repeated by more than one person; reminding participants that these common issues will be forwarded to the SSC for study.

- **Avoiding debates!** Some participants might feel they have to defend their positions or ideas to garner attention. Others might just commence complaining or telling participants that their ideas won’t work. If this happens, remind participants of the agreements again (e.g. active listening, open minds, respectful patience). Also, remind participants that we are only gathering input now, rather than evaluating it, by stating, “Please remember that we want everyone to feel comfortable sharing ideas. One of our Agreements is, ‘open minds,’ so every idea deserves the consideration of the SSC. Let’s just get as many ideas as we can down on paper. When we write the BSC/SPSA we’ll look at these ideas more carefully.”

6. **Select the most notable comments.** For the last 10 minutes, ask participants to look at each question and select the vital comments that your group should share with the larger group.

7. **Share your groups’ comments.** Each facilitator, in turn, will share the comments that the groups decided were most notable. Keep your sharing to about two minutes.

8. **Thank everyone and request assistance to clean up.** After the principal has made closing remarks, thank the remaining participants in your group for coming and for sharing their ideas. If necessary, remind some participants to add their comments to the Additional Requests poster. Collect the chart paper, markers, leftover cards, etc. and take them to a central location. Be sure your name and recorder’s name are on the chart paper in case there are any questions when we tally all the comments.
Sample Community Meeting Agenda

<table>
<thead>
<tr>
<th>Topic</th>
<th>Process</th>
<th>Time</th>
<th>Materials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome Introductions</td>
<td>• Establish language interpretation if needed. Round the room for introductions.</td>
<td>10 min.</td>
<td>• Agendas printed in appropriate languages.</td>
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<tr>
<td></td>
<td>• Validate importance of community participation.</td>
<td></td>
<td>• Agenda charted clearly in front of the room.</td>
</tr>
<tr>
<td></td>
<td>• Remind people of the vision and values for the school.</td>
<td></td>
<td>• Post school vision and values.</td>
</tr>
<tr>
<td>Meeting Outcome &amp; Process</td>
<td>• Present priorities, their source, value and specific meaning.</td>
<td>10 min.</td>
<td>• Handout: Priorities</td>
</tr>
<tr>
<td></td>
<td>• Address questions for clarity.</td>
<td></td>
<td>• Chart of priorities in front of room.</td>
</tr>
<tr>
<td>District and School Priorities</td>
<td>• Present priorities, their source, value and specific meaning.</td>
<td>10 min.</td>
<td>• Handout: Overview of Plan and Budget Process</td>
</tr>
<tr>
<td>Process Overview and timeline for</td>
<td>• Present priorities, their source, value and specific meaning.</td>
<td>10 min.</td>
<td>• Handout: Overview of Plan and Budget Process</td>
</tr>
<tr>
<td>Site Planning &amp; Budget</td>
<td>• Describe benefits. Emphasize the intention of addressing improving learning for all students.</td>
<td></td>
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</tr>
<tr>
<td>Discussion Groups</td>
<td>• Break into small groups.</td>
<td>30 min.</td>
<td>• Flipcharts for each group to record questions.</td>
</tr>
<tr>
<td></td>
<td>• Introduce facilitator and their role.</td>
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<tr>
<td></td>
<td>o Allow some time for individual reflection</td>
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<tr>
<td></td>
<td>o Share ideas in small groups</td>
<td></td>
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<tr>
<td>Next Steps</td>
<td>• Each group presents a list of their key issues/solutions.</td>
<td>20 min.</td>
<td>• Quick Meeting Evaluation Cards to distribute and collect at end of meeting.</td>
</tr>
<tr>
<td></td>
<td>• Quickly categorize key themes from small groups and check for agreement.</td>
<td></td>
<td>• Chart at front of room with next steps with a matching handout for participants to take home after the meeting.</td>
</tr>
<tr>
<td></td>
<td>• Review next steps.</td>
<td></td>
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<td></td>
<td>• Ask for feedback on meeting.</td>
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<td></td>
<td>• Thank everyone for participation.</td>
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Desired Outcomes of Community Meeting
1. To understand the District priorities for all schools.
2. To understand the process the School Site Council will use to create the BSC and budget.
3. To gather a list of initial issues/solutions you want the Balanced Score Card to address for next year.

Focus Questions
1. What is working at our school to ensure all students excel in reading, writing, and math?
2. What can our school do to increase parent involvement?
3. What suggestions do you have for improving student achievement?
4. (If applicable) What would help us decrease tardiness and increase attendance at our school?
Small Group Activity

Identify two academic objectives based on your school’s achievement data.

Discuss various ways in which your school’s budget could be targeted to support these objectives.

How would your group support these objectives with $1,000? With $5,000? With $25,000?

Key Budget Decisions

As your School Site Council develops your Balanced Score Card and budget, you may find it helpful to discuss these questions together:

1) How much money is in the budget allocation for each funding source to be considered in your Balanced Score Card? What are the total resources (including services provided centrally) you have to work with?

2) What academic priorities and strategies can be supported with the budget that is developed by the SSC? Can you see clear links between the budget and the academic component of your school’s most recent Balanced Score Card?

3) What elements of your Balanced Score Card are the most costly?

4) Are there important strategies that aren’t being funded sufficiently? Could resources be realigned to support a stronger Balanced Score Card?

5) If new funding became available, in what ways would you spend it? What is your “wish list” of currently unfunded needs?

6) If funding were to decrease, in what ways would you reduce costs in the budget?
### Sign-In Sheet

_____________ School Community Forum for the BSC/SPSA
[Insert Date Here]

<table>
<thead>
<tr>
<th>Your Name</th>
<th>Role</th>
<th>Child’s Name &amp; Grade</th>
<th>Phone/email</th>
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</table>
Child Care Sign-In Sheet

___________ School Community Forum for the BSC/SPSA
[Insert Date Here]

<table>
<thead>
<tr>
<th>Child’s Name</th>
<th>Parent Sign-In</th>
<th>Parent</th>
<th>Sign-Out</th>
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</table>
SSC Process Checklist: Community Meeting

School Name ________________________________

Date of Meeting ________________________________

The purpose of this meeting is to gather input and to give the community an opportunity to share the preliminary Spring Balanced Score Card submitted to the District. The meeting should take place at a time that is convenient for families. Families should be made to feel welcome and comfortable (e.g. by providing child care, translation, etc.) and there should be ample opportunity for community members to express their opinions. Schools can nominate a member of their community to act as a process observer or can ask for a central office staff member to observe and give feedback.

Representation: Approximately how many members of the community are present? Is it a diverse group, reflecting the population of the school (check the school’s SARC online for a demographic breakdown)?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Substance: Is the discussion focused on the Balanced Score Card priorities? Is student achievement serving as a primary basis for discussion? Did the meeting produce desirable outcomes (e.g., decisions, clarification of future direction)?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Opportunities for input: Is it clear (from the agenda or other sources) what the purpose of the meeting is? Is an effort made to have everyone’s opinions heard and recorded? Was there effective interpretation to ensure that English Learner families were heard?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

SSC Observer Checklist: School Site Council Meeting

School Name ________________________________________________________________

Observer Name ____________________________________________________________

Date of Meeting ____________________________________________________________

School Site Council meetings: During this period, School Site Councils should be engaged in reviewing community input and drafting the Balanced Score Card for the 2012 - 2013 school year. The meeting should be run by the SSC chair and there should be operating rules (e.g., bylaws) in place and enforced. There should be ample opportunity for all SSC members to participate. Schools can nominate a member of their SSC to act as a process observer or can ask for a central office staff member to observe and give feedback.

Representation: Approximately how many SSC members are present? Are the various constituencies in attendance (parents, staff members, students, community members)?

________________________________________

________________________________________

________________________________________

Substance: Is the discussion focused on the Balanced Score Card priorities? Is student achievement serving as a primary basis for discussion? Did the meeting produce desirable outcomes (e.g., decisions, clarification of future direction)?

________________________________________

________________________________________

________________________________________

Opportunities for input: Is it clear (from the agenda or other sources) what the purpose of the meeting is? Is an effort made to have everyone's opinions heard and recorded?

________________________________________

________________________________________

________________________________________