

Routing: Principals and School Site Council (SSC) Chairpersons	SITE OPERATIONS BULLETIN School Year 2025-26	BULLETIN NUMBER: 106 DATE: September 2, 2025 DUE DATE: None.
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Title: EXPENDITURE OF MAJOR CATEGORICAL (TITLE I AND CSI)
FUNDS FOR 2025-26

Issuing Department: Strategic Planning for Student Achievement Department

Reference: Education Code 52853 (b)

Summary: Guidelines on the use of federal and local funding.

Action Requested:

- 1) **Review** the Budget/Expense Transfer and SPSA Modification forms with the School Site Council (SSC).
- 2) **Use** the Budget/Expense Transfer and SPSA Modification form as needed.
- 3) **Submit** job duty statements for new personnel funded by categorical programs.
- 4) **Submit** PARS for personnel/position changes funded by categorical programs.

Brief Explanation:

State Education Code 52853(b) requires that the School Site Council (SSC) oversee the strategies and budgets associated with the School Plan for Student Achievement (SPSA). Title I budgets associated with the SPSA include Title I Part A Basic Program (30100), Title I Parent Involvement (30103), and Comprehensive Support and Improvement (CSI) (31820).

Sites were allocated Title I funds for the 2025-26 school year during the spring of 2025. The SPSA and corresponding Title I budgets are reviewed by the Strategic Planning for Student Achievement Department (SPSA Department) and approved by the Board of Education. Budgets are fluid, and plans are responsive to student needs. As plans are adjusted during the year, budget allocations may also need to be adjusted accordingly.

Intent and Use of Title I Funds:

The intent of Title I funding at school sites is to provide direct instructional support to students beyond the educational program provided by the district. Site Title I expenses must provide direct services to students and support their academic achievement, and must be clearly identified and justified as contributing to student achievement.

Expenditures for 2025-26 from the following programs must be reviewed by the School Site Council (SSC) on an ongoing basis in relation to the goals/strategies identified in the site plan:

- Title I Part A Basic Program [Resource Code 30100]
- Title I Parent Involvement [Resource Code 30103]
- Comprehensive Support and Improvement [Resource Code 31820]

Please review the Major Categorical (Title I) Funds Expenditure Guidelines for 2025-26 ([Attachment 1](#)) with your SSC and the Timeline for Title I Budget Responsibilities 2025-26 ([Attachment 3](#)). This

important information helps clarify the appropriate uses of Title I funds and suggests a timeline for site actions related to these funds.

The SSC must be familiar with these requirements and should refer to these guidelines when developing the SPSA and accompanying budget. A vital consideration for the SPSA Department staff when approving expenditures of Title I funds is the involvement of SSC in the development or revision of the SPSA evaluation and/or budget, as documented in meeting minutes and relevant meeting attachments/artifacts.

Intent and Use of Local Control Funding Formula (LCFF) Funds:

The purpose of LCFF/Resource 09800 is to support the following student populations:

- Low Income
- English Learners
- Foster Youth

The focus of expenses is concentrated in three broad areas: intervention support, classroom support, and professional development, which are found throughout the SPSA.

Please review the LCFF Spending Guidelines for 2025-26 ([Attachment 2](#)). This provides important information to help clarify the appropriate uses of LCFF funds. LCFF funds require community input and, therefore, should be reviewed by the SSC on an ongoing basis in relation to the goals/strategies identified in the site plan.

Instructions for Expending Title I and LCFF Funds:

For the following Title I, CSI, and LCFF budget requests, sites must complete the corresponding Budget/Expense Transfer and SPSA Modification form, which is **embedded within a site's [Google budget overview](#)**, and submit the signed form along with any required documentation. SPSA Department staff ([Attachment 4](#)) review the submitted form in relation to the site's SPSA evaluation and approve any changes in the plan and/or proposed Title I, CSI, and LCFF budget expenditures prior to the posting of any budget transfers for expenditures.

The Budget/Expense Transfer and SPSA Modification form must be used for:

1. Changes in Title I, CSI, and LCFF expenditures (i.e., changes to funding strings and/or activities) that were allocated in the 2025-26 SPSA.
2. Transfer of expenses into Title I, CSI, and LCFF resources.

The cost of personnel benefits and related substitute time may be balanced within a resource and does not require additional SSC approval if the individual strings do not exceed the overall cost of the position.

Review and approval by SPSA Department staff of all Title I expenditures, including Personal Action Requests (PARs) for personnel/position changes, **must be obtained prior** to the purchase, event, or start date. Expenditures made without prior approval may be transferred to the site's unrestricted budget.

To request Title I and CSI budget and expense transfers, sites should complete the following steps:

1. Meet with your SSC to review site student performance data related to student needs and discuss strategies for addressing these needs. The SSC must discuss and approve the needed modifications to the SPSA and associated budget allocations. Requested and approved transfers can only be processed if a quorum ($Q \geq 50\% + 1$) was established at the SSC meeting.
2. Submit the following documents to the SPSA Department. Please complete separate forms for budget and expense transfers.

Budget Transfers:

- a. Complete the Budget/Expense Transfer and SPSA Modification form in your budget overview. This form must be completed and digitally signed by the site principal. Notify the SPSA department resource teacher that the transfer is ready to be processed.
- b. Email a copy of the minutes from the SSC meeting showing explicit changes to the SPSA that were approved, with discussion and approval highlighted. A quorum (50 percent of SSC members + 1) must have been established at the SSC meeting. A link to the SSC minutes can also be emailed to the SPSA resource teacher.

Expense Transfers:

- a. Complete the Budget/Expense Transfer and SPSA Modification form in your budget overview. This form must be completed and digitally signed by the site principal. Notify the SPSA department resource teacher that the transfer is ready to be processed.
 - b. Email a copy of the minutes from the SSC meeting showing explicit changes to the SPSA that were approved, with discussion and approval highlighted. A quorum (50 percent of SSC members + 1) must have been established at the SSC meeting. A link to the SSC minutes can also be emailed to the SPSA resource teacher..
 - c. Email an accompanying Payroll and Time/Labor report with the proposed expense to transfer identified for accounts 1000-3999 to the SPSA Resource teacher.
 - d. Email an accompanying site Budget Transaction Detail Report and/or Actuals Query with proposed expenses to transfer identified for accounts 4000-7999 to the SPSA resource teacher.
3. Maintain copies of all Budget/Expense Transfer and SPSA Modification forms in the SSC binder for five years.

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

1. Monitor the LCFF budget regularly with your SSC to review site student performance data related to student needs.
2. Submit the following documents to the SPSA department. Please complete separate forms for budget and expense transfers.

Budget Transfers:

- a. Complete the Budget/Expense Transfer and SPSA Modification form in your budget overview. This form must be completed and digitally signed by the site principal. Notify the SPSA department resource teacher that the transfer is ready to be processed.

Expense Transfers:

- b. Complete the Budget/Expense Transfer and SPSA Modification form in your budget overview. This form must be completed and digitally signed by the site principal. Notify the SPSA department resource teacher that the transfer is ready to be processed.
- c. Email an accompanying Payroll and Time/Labor report with the proposed expense to transfer identified for accounts 1000-3999 to the SPSA Resource teacher.
- d. Email an accompanying site Budget Transaction Detail Report and/or Actuals Query with proposed expenses to transfer identified for accounts 4000-7999 to the SPSA resource teacher.

SPSA Department staff review requests and accompanying documentation to confirm that the proposed changes in the SPSA (Title I, CSI, and LCFF budget expenditures) conform to the SPSA goals and are in

compliance with federal, state, and district requirements. SPSA Department staff send an e-mail notification to the site principal upon approval of the request. If you have questions regarding the spending of Title I, CSI, or LCFF funds, the appropriateness of an expenditure, or the process for requesting a transfer of expenditures, please contact your school's SPSA Resource Teacher ([Attachment 4](#)).

Job Duty Statements

A position funded by Title I must have an updated job duty statement that clearly describes the work being performed and is directly related to the program. Job duty statements must be annually revised and submitted to the SPSA Department in combination with the site's SSC-approved Site Plan for Student Achievement using the Job Duty Statement Template and Sample ([Attachment 5](#)). Sites must create a job duty statement for each employee funded partially or in full by categorical programs. Any categorically funded position added during the school year should be accompanied by a Job Duty Statement submitted to the SPSA Department Staff.

Submitting PARS for Personnel Changes Funded by Categorical Programs:

An accurate accounting of personnel funded by categorical programs is required. Review your site's Allocation Status by Assignment report to confirm that personnel funded by categorical programs are accurate. Submit PARs to resolve any discrepancies when changes are required.

For more information about this bulletin, contact:

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Attachment: [Attachment 1 - Major Categorical TI Expenditure Guidelines 2025-26](#)
[Attachment 2 - LCFF Guidelines 2025-26](#)
[Attachment 3 - Timeline for Title I Budget Responsibilities 2025-26](#)
[Attachment 4 - Strategic Planning for Student Achievement Department Contact Information 2025-26](#)
[Attachment 5 - Sample - Job Duty Statement Template](#)