

# School Support and Improvement (SSI) 2025–26 Program Instrument

**California Department of Education**

**April 2025**

## II. Governance and Administration

### SSI 01: School Site Activities

1. Upon receiving notification from the state of any school served by the local educational agency (LEA) that is identified for comprehensive support and improvement (CSI), the LEA shall, for each school identified by the state and in collaboration with educational partners (including principals and other school leaders, teachers, parents, and family members), locally develop and implement a CSI plan for the school to improve student outcomes.  
   (20 United States Code [20 U.S.C.] sections 6311[c][4][D], 6311[d][1][A], 6311[d][1][B], 6318[a][2][A])
   * 1. The plan shall be informed by all indicators described in subsection 1111(c)(4)(B) of the federal Elementary and Secondary Education Act (ESEA), as amended by the federal Every Student Succeeds Act (ESSA), including student performance against state-determined long-term goals. (20 U.S.C. sections 6311[c][4][B], 6311[d][1][B][i])
     2. The plan shall include evidence-based interventions.  
        (20 U.S.C. Section 6311[d][1][B][ii])
     3. The plan shall be based on a school-level needs assessment.  
        (20 U.S.C. Section 6311[d][1][B][iii])
     4. The plan shall identify resource inequities, which may include a review of LEA and school-level budgeting, to be addressed through implementation of such plan. (20 U.S.C. Section 6311[d][1][B][iv])
     5. The plan shall be approved by the school, LEA, and state educational agency (SEA). (20 U.S.C. Section 6311[d][1][B][v])
   1. Upon receiving notification from the state of any school served by the LEA in which any subgroup of students is consistently underperforming as described in subsection 1111(c)(4)(C)(iii) of the ESEA, as amended by the ESSA, the LEA shall provide notification to such schools that they have been identified for targeted support and improvement (TSI).  
      (20 U.S.C. sections 6311[c][4][C], 6311[d][2][A][ii])
      1. The LEA shall include in the above notification which student subgroups in such school(s) are consistently underperforming.  
         (20 U.S.C. Section 6311[d][2][A][ii])
   2. Each school receiving such notification as described in section 1.1 of the School Support and Improvement program instrument, in collaboration with educational partners (including principals and other school leaders, teachers, parents, and family members), shall develop and implement a school-level TSI plan to improve student outcomes based on the indicators in the statewide accountability system established under subsection 1111(c)(4) of the ESEA, as amended by the ESSA, for each subgroup of students that was the subject of notification.  
      (20 U.S.C. sections 6311[c][4], 6311[d][2][B], 6318[a][2[A])
      1. The plan shall be informed by all indicators described in subsection 1111(c)(4)(B) of the ESEA, as amended by the ESSA, including student performance against long-term goals.  
         (20 U.S.C. sections 6311[c][4][B], 6311[d][2][B][i])
      2. The plan shall include evidence-based interventions.  
         (20 U.S.C. Section 6311[d][2][B][ii])
      3. The plan shall be approved by the LEA prior to implementation of such plan. (20 U.S.C. Section 6311[d][2][B][iii])
      4. Upon submission and implementation, the plan shall be monitored by the LEA. (20 U.S.C. Section 6311[d][2][B][iv])
   3. Schools are eligible for additional targeted support and improvement (ATSI) if they are among schools eligible for TSI and if any student group at the school, on its own, meets the criteria for the lowest-performing five percent of Title I-funded schools for CSI. (20 U.S.C. sections 6311[c][4][D], 6311[d][2][C])
      1. A school identified for ATSI shall include in their plan all requirements listed above in section 1.2(a)–(d) of the School Support and Improvement program instrument and shall also identify resource inequities, which may include a review of LEA and school-level budgeting, which will be addressed through implementation of its plan.  
         (20 U.S.C. sections 6311[d][2][A], 6311[d][2][B], 6311[d][2][C])
   4. The School Plan for Student Achievement (SPSA) may serve as the school improvement plan required under federal law for schools identified for CSI, TSI, or ATSI as described in sections 1003(e)(1)(A) and 1003(e)(1)(B) of the ESEA, as amended by the ESSA, as long as the SPSA also meets the federal requirements for such plans.  
      (California *Education Code* [*EC*] Section 64001[h])
      1. Single site school districts and charter schools may use their Local Control and Accountability Plan (LCAP) to serve as their SPSA, provided that the LCAP meets federal school planning requirements and the educational partner requirements established in section 56062(a) of the California *Education Code*, and is adopted at a public hearing pursuant to *EC* Section 52062 or *EC* Section 47606.5, as applicable.  
         (*EC* sections 64001[j], 52062, 47606.5)

#### Evidence Requests

##### LEA Notification to Schools Identified for ATSI/TSI

Abbreviation: LEANtfctnATSI/TSI

Description: Documentation demonstrating that the LEA notified the school(s) identified for ATSI/TSI and notified such school(s) with respect to which student subgroups are consistently underperforming.

Item Instructions:

Related Items: SSI 01

##### School Improvement Plan

Abbreviation: SchImprvPln

Description: Plan that includes necessary components specific to CSI, TSI, or ATSI and was developed in collaboration with educational partners.

Item Instructions: SSI 01: Plan requirements may be met in the SPSA, the LCAP (only for single site school districts or charter schools using their LCAP to serve as the SPSA), or in a separate plan created for CSI, TSI, or ATSI as long as the plan addresses federal school improvement planning requirements.

Related Items: SSI 01, SSI 03

##### Educational Partner Involvement in Plan Development

Abbreviation: EdctnlPrtnrInvlvmtPlnDev

Description: Documentation that shows how the plan was developed in collaboration with educational partners.

Item Instructions: SSI 01: Records (e.g., agendas, meeting minutes, attendance, etc.) that show involvement with educational partners in developing and implementing the plan.

Related Items: SSI 01

## III. Funding

### SSI 02: Allocations and Reporting

1. The LEA must disburse school improvement funds (CSI funds) received under section 1003 of the ESEA, as amended by the ESSA, in accordance with the approved CSI Funding Plan as provided by the LEA in the Grant Management and Reporting Tool (GMART).  
   (California Assembly Bill [AB]–157, Budget Act of 2024 Item 6100-134-0890 Provision 6 of Schedule 2; 20 U.S.C. sections 6301 et seq., 6303[e])

#### Evidence Requests

##### General Ledger

Abbreviation: GnLdgr

Description: Detailed General Ledger for the specific resource code(s) being reviewed. (The General Ledger shall include the date, description, vendor name, and total amount for each expenditure line item.)

Item Instructions: SSI 02: Upload General Ledger for CSI-funded expenditures during the reviewed school year at the LEA level and for each CSI-eligible reviewed school, only pertaining to CSI funds (resource code 3182).

Related Items: AE 02, FM 01, FM 02, FM 03, FM 05, FM 06, EXLP 09, EXLP 11, EXLP 19, SEI 08, SEI 06, SEI 07, CTE 02, ME 07, ME 08, CE 11, CE 12, NorD 05, NorD 06, SSI 02, SSI 03, SSAE 02, SSAE 03, SSAE 04, SSAE 06, SSAE 07, CA 01, CA 04, CA 05, CA 06, CA 07, CA 08, CA 09, CA 10

### SSI 03: Allowable Use of Funds

1. The LEA shall ensure that costs charged to the program(s) under Title I (including CSI) are reasonable, necessary, and allocable in accordance with applicable statutes, regulations, and program plan(s).  
   (2 Code of Federal Regulations [CFR] sections 200.403 – 200.405)
   1. LEAs shall use the funds for the development of interventions/strategies/activities to improve pupil performance at schools identified as requiring support that are aligned to goals, actions, and services identified in the LEA’s LCAP.  
      (California AB–157, Budget Act of 2024 Item 6100-134-0890 Provision 6 of Schedule 2)
      1. CSI funds shall not be expended to hire additional permanent staff.  
         (California AB–157, Budget Act of 2024 Item 6100-134-0890 Provision 6 of Schedule 2)

#### Evidence Requests

##### Duty Statements

Abbreviation: DtyStmnt

Description: An individual employee’s duty statement describing responsibilities and activities, as agreed to by employer and employee.

Item Instructions: SSI 03: Duty statement for each staff funded all or in part with CSI funds at the LEA level and at each CSI-eligible reviewed school. Clearly identify the duties from each fund source.

Related Items: AE 04, FM 01, FM 03, EXLP 11, SEI 06, SEI 07, CTE 04, ME 09, CE 12, CE 13, CE 15, NorD 06, SSI 03, SSI 05, EL 07, EL 08, CA 01, CA 09, CA 10, SSAE 03

##### General Ledger

Abbreviation: GnLdgr

Description: Detailed General Ledger for the specific resource code(s) being reviewed. (The General Ledger shall include the date, description, vendor name, and total amount for each expenditure line item.)

Item Instructions: SSI 03: Upload General Ledger for CSI-funded expenditures during the reviewed school year at the LEA level and for each CSI-eligible reviewed school, only pertaining to CSI funds (resource code 3182).

Related Items: AE 02, FM 01, FM 02, FM 03, FM 05, FM 06, EXLP 09, EXLP 11, EXLP 19, SEI 08, SEI 06, SEI 07, CTE 02, ME 07, ME 08, CE 11, CE 12, NorD 05, NorD 06, SSI 02, SSI 03, SSAE 02, SSAE 03, SSAE 04, SSAE 06, SSAE 07, CA 01, CA 04, CA 05, CA 06, CA 07, CA 08, CA 09, CA 10

##### Position Control Report

Abbreviation: PstnCntrlRprt

Description: Budget report of employees planned to be paid in whole, or in part, with federal funds by resource code in the fiscal year under review.

Item Instructions: SSI 03: Table of staff at LEA and reviewed schools funded all or in part with CSI funds. Include full name, position title (spell out the entire title), funding, percentage of each funding, and hours worked.

Related Items: FM 01, FM 03, SEI 06, SEI 07, ME 09, CE 12, CE 15, NorD 06, SSI 03, SSI 05, SSAE 03, CA 01, CA 09, CA 10

##### School Improvement Plan

Abbreviation: SchImprvPln

Description: Plan that includes necessary components specific to CSI, TSI, or ATSI and that was developed in collaboration with educational partners.

Item Instructions: SSI 03: Plan requirements may be met in the SPSA, the LCAP (only for single site school districts or charter schools using their LCAP to serve as the SPSA), or in a separate plan created for CSI, TSI, or ATSI as long as the plan addresses federal school improvement planning requirements.

Related Items: SSI 01, SSI 03

##### Time and Effort Records

Abbreviation: TmEfrtRcrds

Description: Documentation to support salaries and benefits charged to each program funding source under review in accordance with federal requirements. Records may include personnel activity reports, semiannual certifications, or other equivalent records. Budget estimates do not qualify as support.

Item Instructions: SSI 03: Documentation (e.g., personnel activity reports, semiannual certifications, time sheets, time cards, etc.) for each staff, at the LEA level and at each CSI-eligible reviewed school, funded all or in part with CSI funds (resource code 3182).

Related Items: AE 02, FM 01, FM 03, EXLP 09, CTE 04, EL 08, HE 10, ME 09, CE 12, CE 15, NorD 06, SSI 03, SSI 05, SSAE 03, CA 01, CA 09, CA 10, SEI 06, SEI 07

### SSI 04: Supplement Not Supplant with School Improvement Funds

1. Each school the LEA proposes to serve will receive all of the state and local funds it would have received in the absence of the school improvement funds received under section 1003 of the ESEA, as amended by the ESSA. (20 U.S.C Section 6303[e][2])
   * 1. To demonstrate compliance with the above paragraph, the LEA shall demonstrate that the methodology used to allocate state and local funds to each school receiving assistance under this part ensures that such school receives all of the state and local funds it would otherwise receive if it were not receiving assistance under this part.  
        (20 U.S.C. Section 6321[b][2])

#### Evidence Requests

##### Methodology for Allocating State and Local Funds

Abbreviation: MthAlctStLcFnd

Description: Documentation demonstrating that state and local funds were allocated to the school sites equitably in the fiscal year under review. Documentation should demonstrate that federal funds were used to supplement state and local funding.

Item Instructions: SSI 04: Provide a narrative and/or table including a formula that shows a system of methods used to determine and allocate state and local funds to schools. Include a sample of how these methods were applied to the fiscal year under review.

Related Items: FM 03, CE 13, SSI 04

### SSI 05: Local Educational Agency Administrative Charges; Time and Effort

1. The LEA must properly charge and document allowable salaries and wages that are reasonable, necessary, and allocable in accordance with applicable CSI program requirements and federal accounting requirements.  
   (2 CFR sections 200.302, 200.430[a], 200.430[i]; California School Accounting Manual [CSAM] Section 905)

#### Evidence Requests

##### Duty Statements

Abbreviation: DtyStmnt

Description: An individual employee's duty statement describing responsibilities and activities, as agreed to by employer and employee.

Item Instructions: SSI 05: Duty statement for each staff funded all or in part with CSI funds at the LEA level and at each CSI-eligible reviewed school. Clearly identify the duties/activities from each fund source.

Related Items: AE 04, FM 01, FM 03, EXLP 11, SEI 06, SEI 07, CTE 04, ME 09, CE 12, CE 13, CE 15, NorD 06, SSI 03, SSI 05, EL 07, EL 08, CA 01, CA 09, CA 10, SSAE 03

##### Position Control Report

Abbreviation: PstnCntrlRprt

Description: Budget report of employees planned to be paid in whole, or in part, with federal funds by resource code in the fiscal year under review.

Item Instructions: SSI 05: Table of staff at LEA and reviewed schools funded all or in part with CSI funds. Include full name, position title (spell out the entire title), funding, percentage of each funding, and hours worked.

Related Items: FM 01, FM 03, SEI 06, SEI 07, ME 09, CE 12, CE 15, NorD 06, SSI 03, SSI 05, SSAE 03, CA 01, CA 09, CA 10

##### Time and Effort Policies and Procedures

Abbreviation: TmEfrtPlcyPrcdrs

Description: LEA’s established written policies and procedures for documenting time and effort of employees that work on federal programs. Current year.

Item Instructions: SSI 05: Include the LEA’s specific policies and procedures for documenting actual hours worked, including related internal controls, employee training, and reconciliation processes.

Related Items: AE 02, FM 01, CTE 04, EL 08, CE 15, NorD 06, SSI 05, CA 01

##### Time and Effort Records

Abbreviation: TmEfrtRcrds

Description: Documentation to support salaries and benefits charged to each program funding source under review in accordance with federal requirements. Records may include personnel activity reports, semiannual certifications, or other equivalent records. Budget estimates do not qualify as support.

Item Instructions: SSI 05: Documentation (e.g., personnel activity reports, semiannual certifications, time sheets, time cards, etc.) for each staff, at the LEA level and at each CSI-eligible reviewed school, funded all or in part with CSI funds (resource code 3182).

Related Items: AE 02, FM 01, FM 03, EXLP 09, CTE 04, EL 08, HE 10, ME 09, CE 12, CE 15, NorD 06, SSI 03, SSI 05, SSAE 03, CA 01, CA 09, CA 10, SEI 06, SEI 07

### SSI 06: Local Educational Agency Equipment Inventory

1. The LEA spending CSI funds on equipment shall maintain a historical inventory record for each piece of equipment with an acquisition cost of $500 or more per unit. The record describes the acquisition by:
   * 1. Type/description
     2. Model/name
     3. Serial/Identification number
     4. Funding source
     5. Federal Award Identification Number
     6. Who holds the title
     7. Acquisition date
     8. Original cost
     9. Percentage of Federal participation in the costs for the Federal award under which the property was acquired
     10. Location
     11. Use and current condition
     12. Transfer, replacement, or disposition of obsolete or unusable equipment
     13. Any ultimate disposition data, including the date of disposal and sale price or method used to determine current fair market value

(*EC* Section 35168; Title 5, *California Code of Regulations* [5 *CCR*] Section 3946; 2 CFR Section 200.313[d])

* 1. Capital expenditures for special purpose equipment are allowable as direct costs, provided that items with a unit cost of $10,000 or more have the prior written approval of the federal awarding agency or pass-through entity. (2 CFR Section 200.439[b][2])
  2. Unless otherwise provided, equipment purchased with CSI funds with a current per unit fair market value in excess of $10,000 may be retained by the non-federal entity or sold with a certain percentage of the current market value or proceeds from sale going to the federal awarding agency pursuant to federal regulations (see 2 CFR Section 200.313[e][2]).   
     Equipment with a current per unit fair market value of $10,000 or less may be retained, sold, or otherwise disposed of with no further obligation to the SEA (federal awarding agency). (2 CFR Section 200.313[e][1]-[4])
  3. The LEA must conduct a physical inventory of the property and the results must be reconciled with the property records at least once every two years.  
     (2 CFR Section 200.313[d][2])

#### Evidence Requests

##### Approval of Capital Expenditures

Abbreviation: AprvlCptlExpnd

Description: For items with a unit cost of $10,000 or more, the corresponding Capital Expenditures Request Form showing approval by the California Department of Education.

Item Instructions: SSI 06: Provide the approved Title I CSI Capital Expenditures Request Form pertaining specifically to items purchased with CSI funds.

Related Items: CE 16, NorD 04, SSAE 02, SSAE 04, SSAE 06, SSI 06

##### Equipment Inventory Records

Abbreviation: EqpmntInvntyRcrds

Description: Historical inventory list of all equipment purchased for $500 or more per Education Department General Administrative Regulations (EDGAR)/EC requirements and a record of last physical check of items. If no purchases were made, indicate that in a comment.

Item Instructions: SSI 06: Evidence the physical check has occurred for equipment purchased with CSI funds. If applicable, include approval of the equipment disposal form.

Related Items: AE 02, AE 09, EXLP 08, EXLP 11, CTE 05, EL 06, HE 08, ME 06, CE 16, NorD 04, SSI 06, CA 05, EED 17