

### **SBB Finalization Meetings**

The purpose of the SBB finalization meeting is to provide the site administrator and supporting department staff the ability to discuss and finalize the budget and staffing for the upcoming school year. This document outlines the preparation process for principals.

#### **What is the principal's role?**

- Ensure supplemental funds are used to become a highly reliable school aligned to the SPSA plan. The funds should be identified under the appropriate category (e.g. Professional Development with a note that states "Mathematics PLC").
- Attend the [SBB Feedback meeting](#) with your Area Superintendent:
- Hold your ELAC, SSC and SGT meetings prior to your SBB finalization meeting
- Create the master schedule (middle, high, alternative, atypical, and K-8).
- Obtain and complete the following forms from the applicable circular or your HRO as necessary:
  - Limited Assignment Credential in Lieu of Excess Forms
  - Alternative Site Assignment Consent Forms
  - Voluntary Reduction Forms
  - Job Share Applications
  - Reduced Work Year Applications
- Submit online excess and vacancy forms prior to the finalization meeting. Bring the signed form with you if you haven't already sent it to HR.
- Attend your scheduled SBB Finalization Meeting.
- Submit your SBB during/after the finalization meeting.

#### **What is the role of the Area Superintendent?**

- Ensure the site is using data (quantitative and qualitative) and evidence based practices to drive continuous improvement aligned to your SPSA.
- Ensure supplemental funds are used to become a highly reliable school aligned to the SPSA plan. The funds should be identified under the appropriate category.
- Review master schedule and assignments and ensure they are aligned with data/student needs. Provide checks and balances process to ensure Principals have not changed the commitments they made during the [SBB Feedback meeting](#) discussion.
- Ensure program continuance or deletion meets the school community needs (for instance coursework meets cluster alignment/focus e.g. Arts, STEM, Language, etc.).

### What is the role of the Human Resource Officer?

- Review Step 5
  - Certificated Questions:
    - Are the people balanced?
    - Are returning LOAs accounted for?
    - Are reduced workload participants entered? (form needed)
    - Are there voluntary reductions? (form needed)
    - Does TK teacher meet new requirements?
    - Are job shares entered? Are any job shares breaking?
    - Are LVRs and PRZs zeroed out?
    - Are the correct people excessed (least senior or voluntary excess; broken bundle)?
    - Are the people excessed in SBB on the excess and vacancy sheet?
    - Are all vacancies recorded on the excess and vacancy sheet? Is all of the posting information appropriate and correct?
  - Classified Questions:
    - Have all of the SBB Guideline rules been followed?
    - Are FTEs appropriate for actual positions? (use FTE reference sheet)
      - NOTE: Any Classified position zeroed out in SBB looks like an elimination/ layoff. That is the ONLY reason to zero out an employee.
    - Is the least senior person's position eliminated if multiple positions with the same FTE exist in a job class?
    - If there are multiple jobs in a job class and one is being eliminated, is a person's position being skipped due to bilingual needs?
    - If a site added a new classified position and it is bilingual, was that indicated on the notes section in SBB and on HROs staffing sheets? (must state what language, i.e. Spanish or Tagalog, etc.) Did the site eliminate a classified position and add the same position with a lower FTE? (That is considered a reduction and classified positions CANNOT be reduced.)
- Review Step 6
  - Does everyone have a subject entered by their name (except administrators and in-school or project resource teachers)?
  - Does the credential match the master schedule?
  - Does the credential match the subject area?
    - If not, do we have a limited assignment agreement from them? (form needed)

### **What is the role of the Finance Team?**

- Analysts
  - Review level of discretionary budget - must maintain minimum amount based on prior year.
  - Check to make sure copier is budgeted (and any other necessary expenses)
  - Complete full Budget strings.
  - Ensure positions are not eliminated/added in order to capture a funding change. Instead, a funding change can be captured by updating the budget string of a position in Step 5 or 7.
  - Verify budgets are balanced - all resources balanced to less than a dollar.
- Resource Teachers
  - Verify that Title I and 09800 expenditures meet requirements.
  - Verify restricted funding spent appropriately (especially positions) and balanced to less than a dollar
  - Verify all positions have green check marks.