

ADMINISTRATIVE CIRCULAR NO. 18

Office of the Chief Financial Officer

SAN DIEGO UNIFIED SCHOOL DISTRICT

Date: September 5, 2014

To: All School Principals and Child Development Center Administrators

Subject: FEDERAL IMPACT AID SURVEY TO BE CONDUCTED ON OCTOBER 24, 2014

Department and/or Persons Concerned: Site Administrators, Teachers and School Secretaries

Due Date: December 5, 2014

Reference: Administrative Procedure 6060

Action Requested: Distribute and return completed survey cards by timeline indicated below and in accordance with instructions on the attached packet.

Brief Explanation:

The 2014-2015 Federal Impact Aid Survey will be conducted on October 24, 2014. As a result of your continued effort, support, and assistance in completing the annual survey, the district earns a significant amount of income.

Special attention should be given to the noted dates:

- October 6 through October 10—Survey cards delivered to school sites.
- October 24—Distribute survey cards to students.
- December 5—Return survey cards to the Impact Aid Office, Eugene Brucker Education Center, Room 3244

For complete instructions, please refer to the attached packet, “2014-2015” Federal Impact Aid Survey Information Packet.” For additional assistance, contact Pat McCoy in the Impact Aid Office at (619) 725-7593 or Tawnee Brooks at (619) 725-7594

Jodie Macalos
Controller

APPROVED:



Jenny Salkeld
Chief Financial Officer

JS:vb

Attachments

Distribution: Lists B (without attachment), C, D, E, and F

SAN DIEGO UNIFIED SCHOOL DISTRICT
Financial Operations Division
Accounting Operation Department

2014-2015
FEDERAL IMPACT AID SURVEY
INFORMATION PACKET

September 2014

Federal Impact Aid Survey Information Packet, 2014-2015

LIST OF CONTENTS

1. Memorandum to School Secretaries/Clerks
2. Important Instructions for Office Staff
3. Site Action Plan
4. Instructions for Tracking and Submitting Federal Survey Cards
5. Running Enrollment List in Zangle
6. Sample: Federal Survey Report
7. Instructions for Label Running
8. Information for District Employees
9. Principal's Certification of Survey Card Release Date
10. Principal's Certification of Special Ed Student Info
11. Check List for Teachers
12. Memorandum to Teachers
13. Parent Letter (English)
14. Parent Survey Letter (Spanish)
15. Parent Survey Letter (Somali)
16. Hints: Successful Collection of Survey Cards
17. Federal Property List

If you need translations in Tagalog, Somali or Vietnamese, or any additional English or Spanish cards, please call (619) 725-7593 or (619) 725-7594.



TO: School Secretaries/Clerks
CC:
FROM: Pat McCoy
DATE: September 5, 2014
RE: IMPACT AID SURVEY FOR 2013/14 SURVEY DATE: OCTOBER 24, 2014
DUE DATE: DECEMBER 5, 2014

Once again, it is time to conduct the annual Survey of Residence and Employment. It is an added task to an already busy schedule and we appreciate all the work you do for this each year. It is very important to our schools financially to be able to count every student possible for the survey process.

Be aware that **you are a major driving force** in obtaining millions of dollars a year for the district. For the last several years, the district's federal survey claim has received **over \$8 million annually**. Know that we in the Impact Aid office appreciate your efforts very much. The dollars accumulate card by card and we need your organizational and motivational skills to conduct a successful survey.

Please, carefully read all the materials in this packet. The Federal Survey Information for District Employees will be helpful to new employees not familiar with the survey. We have added a brief explanation of the purpose of the survey on the back of the survey card. Hopefully this will reduce parents' questions, enabling us to collect more cards and obtain more funding for our schools. Please look at the cards themselves before sending them out so you are familiar with them before questions come in.

Please see the enclosed instruction sheets and list of suggestions from district employees that have been successful in collecting survey cards.

Remember, the cards cannot go out before the survey date!

Please remove all the staples from the cards (except for duplicates) before sending them in. We know you receive them in by class, but we must receive them by school. There is a new instruction sheet for tracking and submitting cards.

Thank you for working with us to obtain this valuable Impact Aid funding. Together we can conduct a successful survey and bring in millions of dollars this year for our schools. These dollars accumulate card by card and each card has the potential of increasing the value of our claim to the U. S. Department of Education.

If you have any questions or problems, or if you need more materials, please call Pat McCoy at (619) 725-7593 or Tawnee Brooks at (619) 725-7594.

INSTRUCTIONS FOR OFFICE STAFF

THE INFORMATION ENTERED ON SURVEY CARDS MUST BE AS OF OCTOBER 24, 2014.

The Impact Aid survey date for all students enrolled in Traditional, Year Round, or Multi-Track schools including Child Development Centers, State Preschools, School Readiness Program, and SEEC Program will be October 24, 2014. This includes those students enrolled in tracks that will be on vacation at the time of the survey.

All references to *Parent* in the following instructions include *Parent, Stepparent, Guardian*, or other person with whom the student lives.

The survey cards must not be sent home to the parent(s) prior to the survey date of October 24, 2014.

1. Follow the "Site Action Plan" step by step instructions on how to distribute and collect the survey cards.
2. You must track and submit your cards with an active enrollment list run on the survey date. See packet insert "Instructions for Tracking and Submitting Federal Survey Cards" for direction on how to track, collect, and submit your cards. For Power School users, please refer to "Running the Federal Survey Card Export in Power School" also included in this packet. If on SIS, run in SIS, export to Excel, insert tracking columns at far left, and title your report. Save this on a backup drive for the entire year.
3. If you need additional English or Spanish survey cards, please call the Impact Aid Office at (619) 725-7593 or (619) 725-7594.
4. One survey card must be completed by the parent(s) for each student in the active enrollment on the survey date, October 24, 2014.
5. The school name and location number must appear in the upper left corner of the card in the space provided prior to completion by the parent(s).
6. Military personnel on full-time duty must list their Name, Branch of Service, and Rank.
7. The employment information of the parent(s) must be accurate and complete. If the military section in the middle has been completed, the employment section for that parent need not be completed. All other cards must have the employment section completed.
8. A parent or guardian signature is required on all cards. The student cannot sign for the parent or guardian. Please do not write any references or explanations on the signature line of any card.
- 9. The cards cannot go out before the survey date!**
10. Please remove all staples and alphabetize by school as outlined in "Tracking and Submitting..." Although you received your cards by class, we **must receive them in alpha order by school.**
11. Please submit your completed cards, Federal Survey Report, and an up-to-date list of all Special Education students with an active IEP. Please include the four-digit code for each student. Your resource specialist should be able to help you with this. Please attach the signed "Principal's Certification of Special Ed Student Info" to this list. In addition, please enclose the "Principal's Certification of Survey Card Release Date."

REMEMBER: Submit completed survey cards **NO LATER THAN DECEMBER 5, 2014**, as follows: sorted by school in alpha order, with staples removed (except for duplicate cards) and all items outlined in #11. Forward completed cards to the Impact Aid Office, Room 3244, Eugene Brucker Education Center, by due date noted above.

SITE ACTION PLAN

Prepare a tracking list, using the enclosed “Instructions for Tracking and Submitting Federal Survey Cards.” On the survey date, October 24, 2014, distribute a class roster with all students in **alpha order**, and blank cards to each teacher, along with the “Memorandum to Teachers” enclosed in this packet. **Cards must not be given out before the survey date.**

Please remember: Run labels and attach to survey cards before or after distributing to classrooms (see Instructions for Label Running).

Use the enclosed letter template, format onto your school letterhead, and staple to the **BACK** of the card so parents can see the card and read the explanation.

Have teachers check the cards for completeness and turn in only complete cards with employment information. There is no time to pass incomplete cards back and forth between teachers and office staff. Teachers can write notes such as “please return tomorrow so we can reach 100 percent completion,” or “please complete lower section so we can reach 100 percent completion” in the upper section and sign the note.

DO NOT let cards pile up on teachers’ desks or classrooms. To avoid this type of back up, on a daily basis, have teachers check off completed cards, make a copy of the list for you, and turn in the cards and check off list. Please ensure that teachers date the daily lists as they turn it in.

Maintain your survey card tracking report and cards sorted by teacher until the last few days of the survey period. Refer to “Tracking and Submitting Federal Survey Cards” for complete instructions on this process.

The students who have not turned in cards by Wednesday, November 12, should have other measures taken. These should be discussed by the Principal and staff.

At The Elementary Level: Some sites have ice cream parties. Calls to the home may need to be made.

At The Secondary Level:

A very effective method is to have a counselor, vice principal or other staff member go to classrooms, request students be released out into the hall, give them a card and tell them they will be back the next day. This takes some time if you have a high volume of missing cards but gets the fastest results as they do not like being taken out of class in front of their friends. This is much more effective than sending for them to come to the office. If sites plan in advance for this and free up personnel during this time, it should be less problematic and you should be able to get the job done. Each day, give the counselor or vice principal lists, by classroom, with students’ names whose cards are missing (taken directly from your tracking list).

You should be able to collect a high number of cards if staff stays on task until all cards can be integrated into alpha order in the school office,

Other Ways to Collect Cards:

- Parent conferences: Make sure these are scheduled during the survey time and have the parents fill them out at the conference.
- Parents calling or coming in: If calling, ask if they have filled out a card and if not; ask them to please fill out a card as it helps the district obtain federal funding. If they come in, have them fill out a card right then. Check to see that it is complete while they are there.
- Use other methods that work for your school but **do not use** any of the following: Saturday School, detention, giving an increased citizenship grade or penalizing students in any way.
- Try to find ways to use positive reinforcement or rewards that do not involve grades.

Elementary and Secondary Schools: Running the Federal Survey Card Export Job Aid

Version 2.2 · Revised August 27, 2014

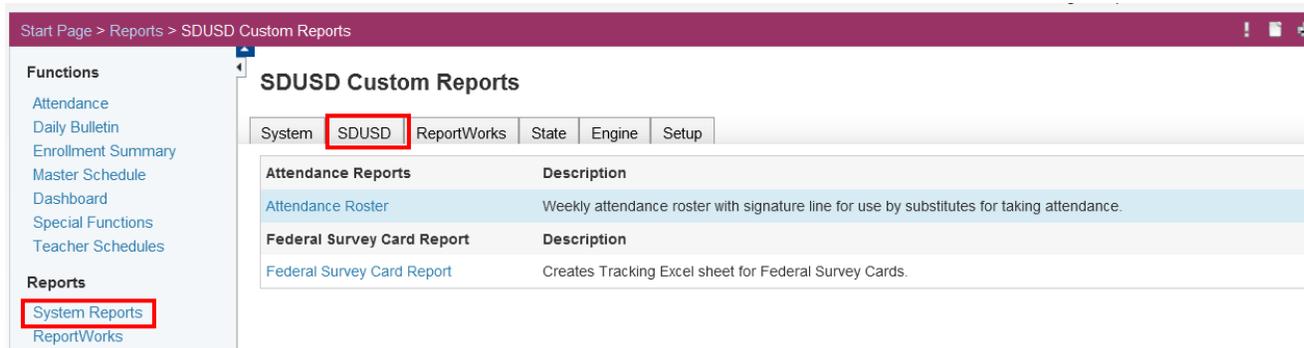
**FOR USE WITH TRACKING
FEDERAL SURVEY CARDS**

This job aid describes the steps that both Elementary and Secondary School staff will need to follow in PowerSchool to create a spreadsheet using Microsoft Excel 2010. Some steps may be slightly different if using another version of Excel. This report will be used for tracking and collecting Federal Survey Cards. Both the cards and the report will be submitted to the Impact Aid Office. You will run the Federal Aid Survey report in PowerSchool, format it and then save it.

NOTE: This report will also be used to run labels and to track survey card collection. See the instructions for *Running Labels for Federal Survey Cards* at the end of this Job Aid.

RUN THIS REPORT ON THE SURVEY DATE FOR THE CURRENT YEAR

1. Launch **PowerSchool** (using FireFox is highly recommended). From the Start, select **System Reports**
2. Select **SDUSD** to open the SDUSD Reports Tab



Start Page > Reports > SDUSD Custom Reports

Functions

- Attendance
- Daily Bulletin
- Enrollment Summary
- Master Schedule
- Dashboard
- Special Functions
- Teacher Schedules

Reports

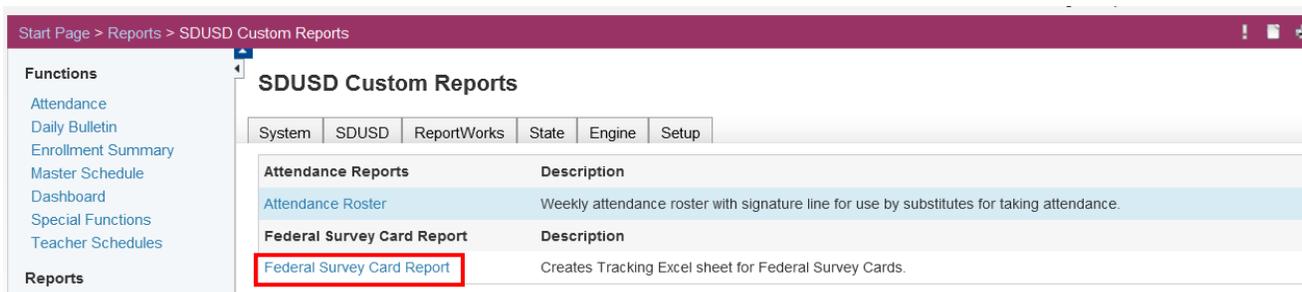
- System Reports**
- ReportWorks

SDUSD Custom Reports

System **SDUSD** ReportWorks State Engine Setup

| Attendance Reports | Description |
|----------------------------|--|
| Attendance Roster | Weekly attendance roster with signature line for use by substitutes for taking attendance. |
| Federal Survey Card Report | Description |
| Federal Survey Card Report | Creates Tracking Excel sheet for Federal Survey Cards. |

3. Select **Federal Survey Card Report**



Start Page > Reports > SDUSD Custom Reports

Functions

- Attendance
- Daily Bulletin
- Enrollment Summary
- Master Schedule
- Dashboard
- Special Functions
- Teacher Schedules

Reports

- System Reports
- ReportWorks

SDUSD Custom Reports

System SDUSD ReportWorks State Engine Setup

| Attendance Reports | Description |
|-----------------------------------|--|
| Attendance Roster | Weekly attendance roster with signature line for use by substitutes for taking attendance. |
| Federal Survey Card Report | Description |
| Federal Survey Card Report | Creates Tracking Excel sheet for Federal Survey Cards. |

4. The default Period is blank for all periods:
 - a. If you are an **Elementary Site (See Example)**, leave the default and then click **Submit**.
 - b. If you are a **Secondary Site (See Example)**, select the period for which you would like the report to run and then click **Submit**. For example, your site may decide to collect the Survey cards during Period 4. In this case, you should select **4** and then click **Submit**.
 - c. If you are a **K-8 Site (See Example)**, select the period(s) for which you would like the report to run and then click **Submit**. Most K-8 sites will need to select a period for their secondary students (such as Advisory), and one for their elementary students.



Start Page > Reports > SDUSD Reports > Federal Survey Card Report

Functions
 Attendance
 Daily Bulletin
 Enrollment Summary
 Master Schedule
 Dashboard
 Special Functions
 Teacher Schedules

Reports
 System Reports
 ReportWorks

People
 Student Search
 Staff Search
 Parent Search

Federal Survey Card Report

Report Name: Federal Survey Card Report
 Version: 1.0
 Description: Creates Tracking Excel sheet for Federal Survey Cards
 Comments: Please select Periods to print

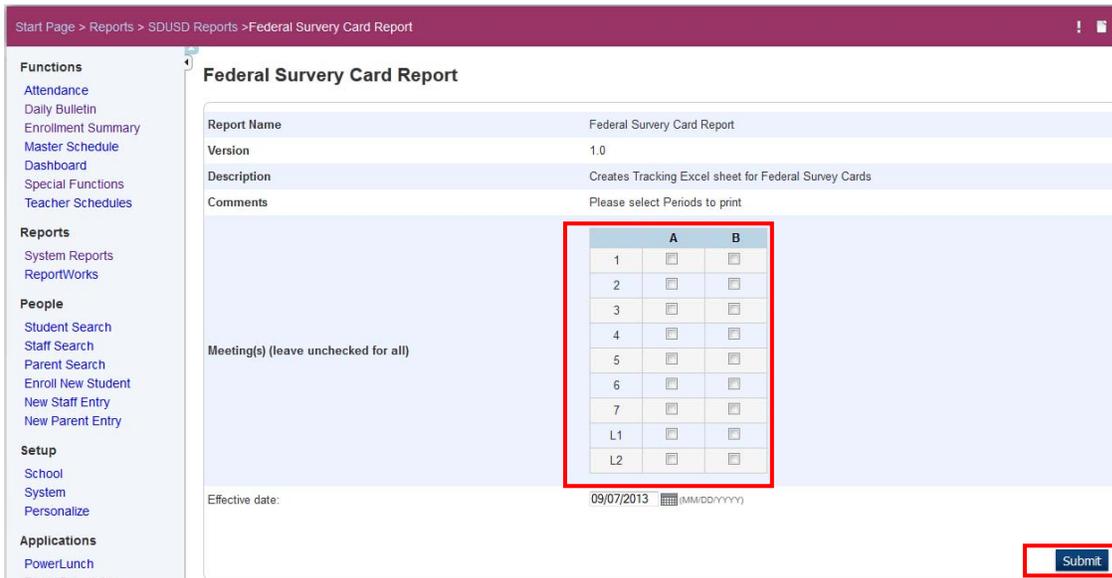
Meeting(s) (leave unchecked for all)

| | 1CY |
|----|-------------------------------------|
| 1S | <input checked="" type="checkbox"/> |

Effective date: 09/07/2013 (MM/DD/YYYY)

Submit

a. Elementary Example



Start Page > Reports > SDUSD Reports > Federal Survey Card Report

Functions
 Attendance
 Daily Bulletin
 Enrollment Summary
 Master Schedule
 Dashboard
 Special Functions
 Teacher Schedules

Reports
 System Reports
 ReportWorks

People
 Student Search
 Staff Search
 Parent Search
 Enroll New Student
 New Staff Entry
 New Parent Entry

Setup
 School
 System
 Personalize

Applications
 PowerLunch
 PowerScheduler

Federal Survey Card Report

Report Name: Federal Survey Card Report
 Version: 1.0
 Description: Creates Tracking Excel sheet for Federal Survey Cards
 Comments: Please select Periods to print

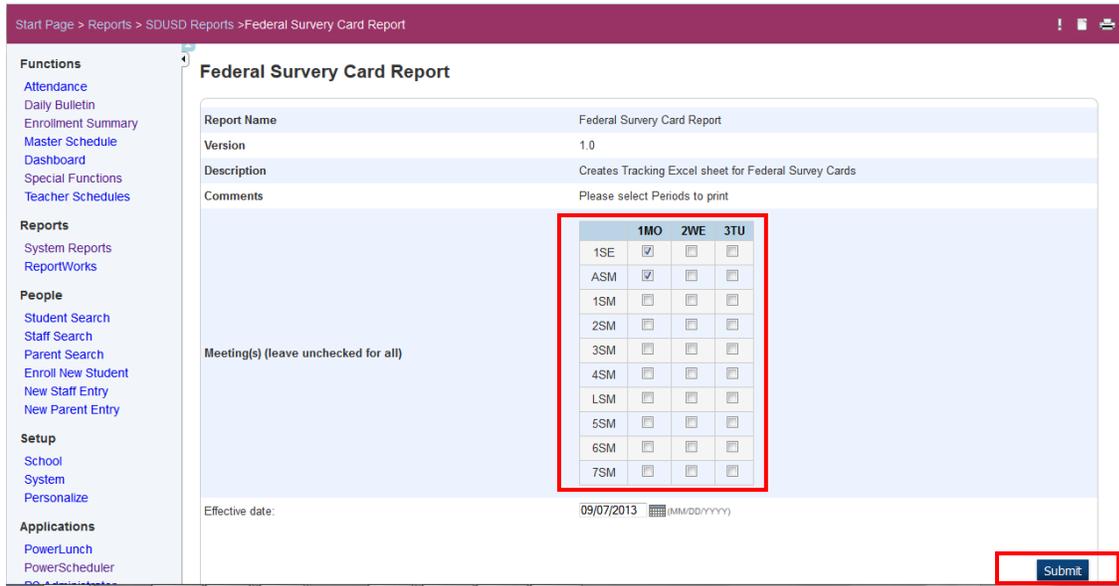
Meeting(s) (leave unchecked for all)

| | A | B |
|----|-------------------------------------|-------------------------------------|
| 1 | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 5 | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 | <input type="checkbox"/> | <input type="checkbox"/> |
| 7 | <input type="checkbox"/> | <input type="checkbox"/> |
| L1 | <input type="checkbox"/> | <input type="checkbox"/> |
| L2 | <input type="checkbox"/> | <input type="checkbox"/> |

Effective date: 09/07/2013 (MM/DD/YYYY)

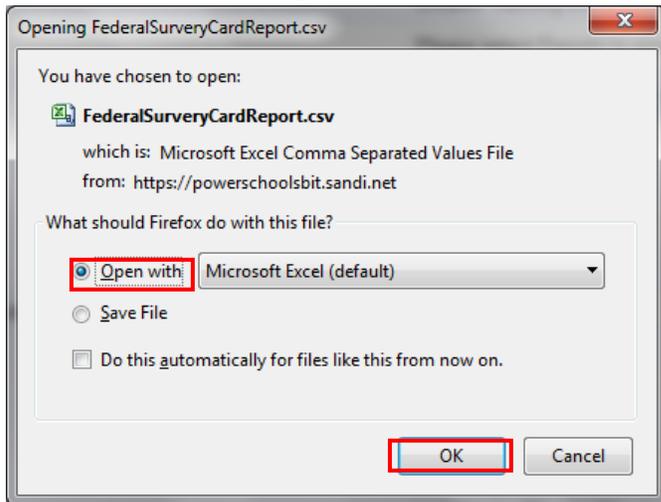
Submit

b. Secondary Example (Your options may look different)



c. K-8 Example (Your options may look different)

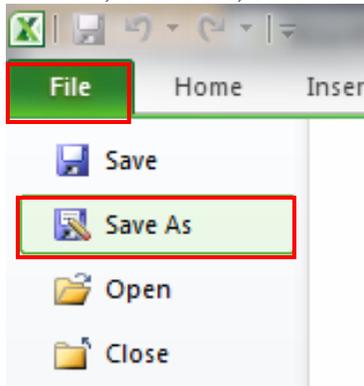
- After clicking on Submit in Step 4, the process to generate the report runs and a dialog window opens. Verify or Click **Open with**.



(Your options may look different)

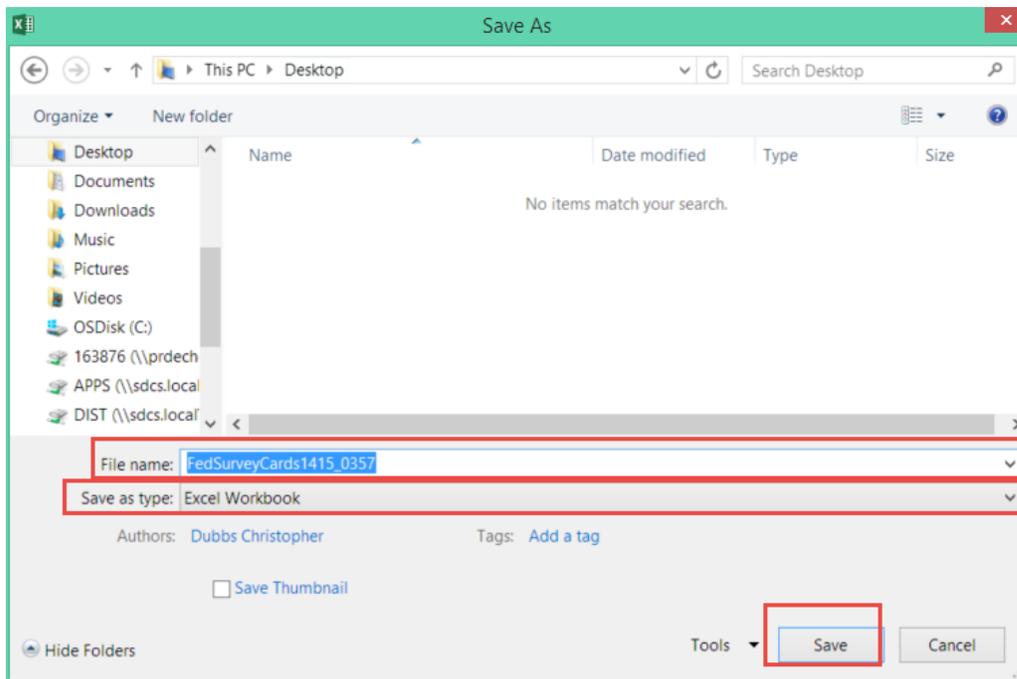
- Click **OK** and Excel opens the file.

7. In Excel, Click **File, Save As**



(Your options may look different)

8. Browse to the location in which you want to store the file. Some users like to first create a new folder, titled **Federal Survey Cards 2014-2015** for example, to store this report and other related files. Name the file to **FedSurveyCards1415_cost center.xls** where “cost center” is your 2014-2015 cost center. For example, if your cost center is 0357, your file should be titled, “**FedSurveyCards1415_0357**”. Select **Excel Workbook** in the ‘Save as type’ field.



9. Click **Save**.

10. If this prompt appears, click **Open**.



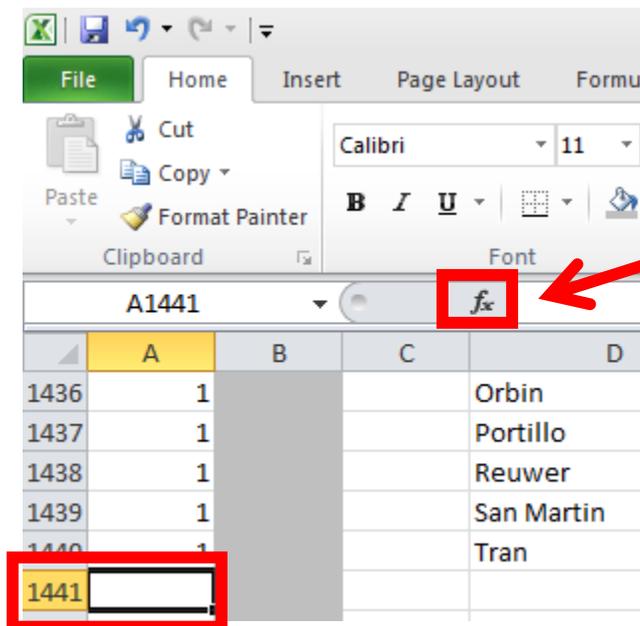
FORMATTING THE FEDERAL SURVEY CARD REPORT

THE ENRMT COLUMN HAS A 1 PRE-POPULATED ENTERED FOR EACH STUDENT IN ORDER TO CREATE A TOTAL AT THE BOTTOM OF THE ENRMT COLUMN (STEPS BELOW).

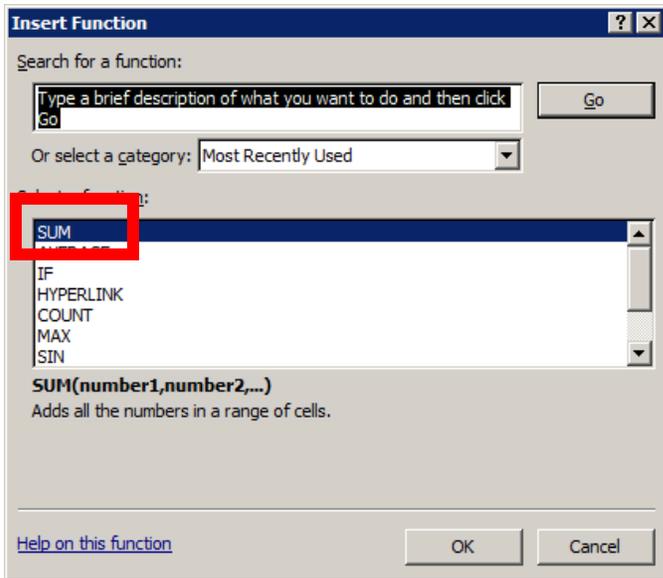
| | A | B | C | D |
|---|-------|-------|-----------|-------------|
| 1 | ENRMT | BLANK | HAVE CARD | Last Name |
| 2 | 1 | | | Angulo |
| 3 | 1 | | | Black-Jones |
| 4 | 1 | | | Carr |
| 5 | 1 | | | Castillo |

TOTAL THE ENRMT COLUMN.

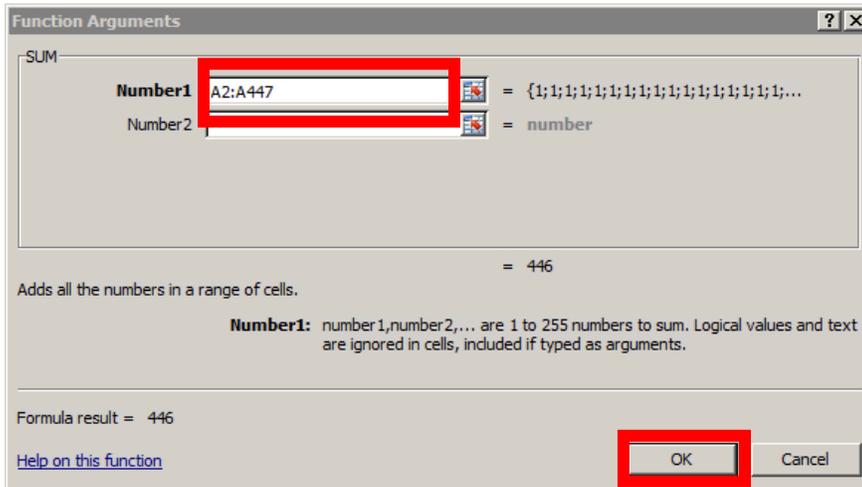
1. Click the cell after the last student in the **ENRMT** column on your report. In the example below that would be in cell **A1441**
2. Insert the **SUM function**. This can be done multiple ways. One way is to click the **Insert Function** icon as shown in the screen shot below:



3. Make sure the **SUM** function is selected from the list.



4. Click **OK**. A new window will appear.
5. In the **Number 1** field, it should be **A2** (the first cell you want totaled), then the last cell you want totaled, in this example it is **A447**. See the screen shot below. Your last cell number will be different. It will be the cell number of the last student on your report.



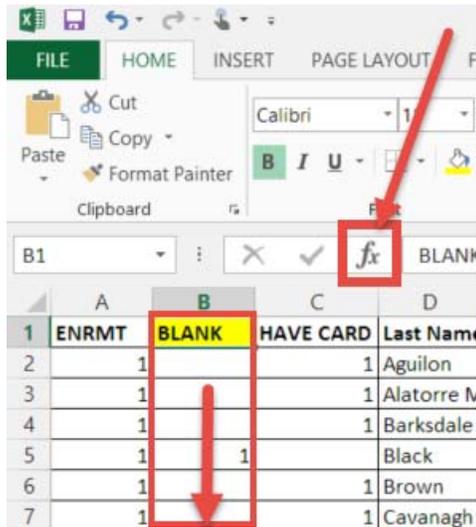
6. Click **OK**. Your report should now have the total number of the **ENRMT** column as shown in the screen shot example below. Your total number will be different.

| | | | |
|------|------|--|----------|
| 1437 | 1 | | Portillo |
| 1438 | 1 | | Reuwer |
| 1439 | 1 | | San Mar |
| 1440 | 1 | | Tran |
| 1441 | 1439 | | |

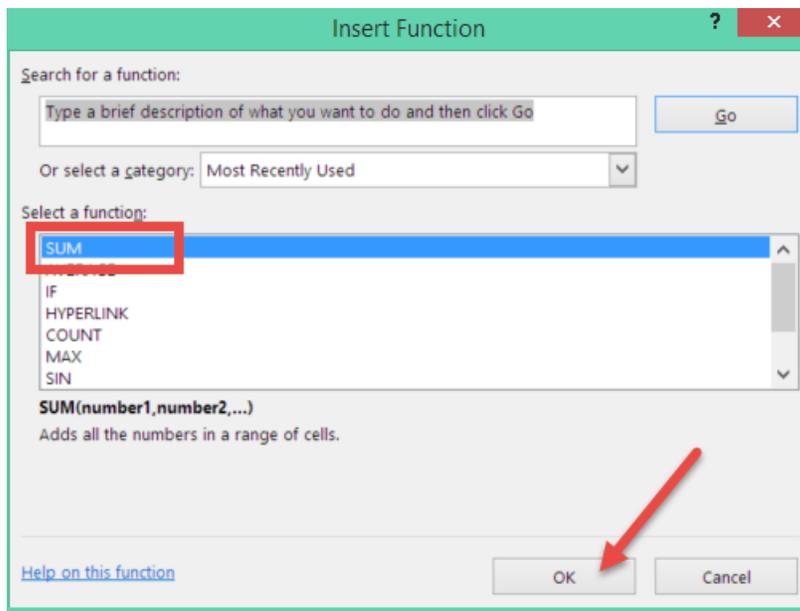
This is your total enrollment on the survey date.

NEXT, TOTAL THE **BLANK** COLUMN.

1. Click the cell after the *last* student in the **BLANK** column on your report.
2. Insert the **SUM function** for B column. This can be done multiple ways. One way is to click the **Insert Function** icon as shown in the screen shot below:

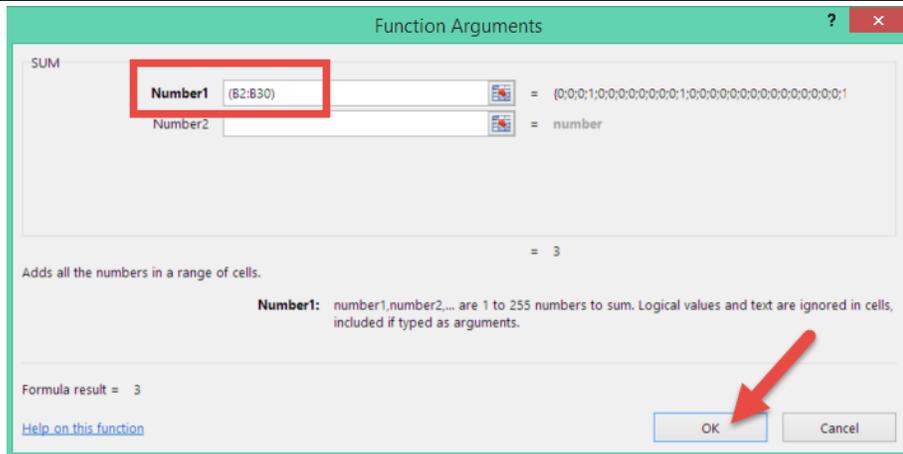


3. Make sure the **SUM** function is selected from the list.



Click **OK**. A new window will appear.

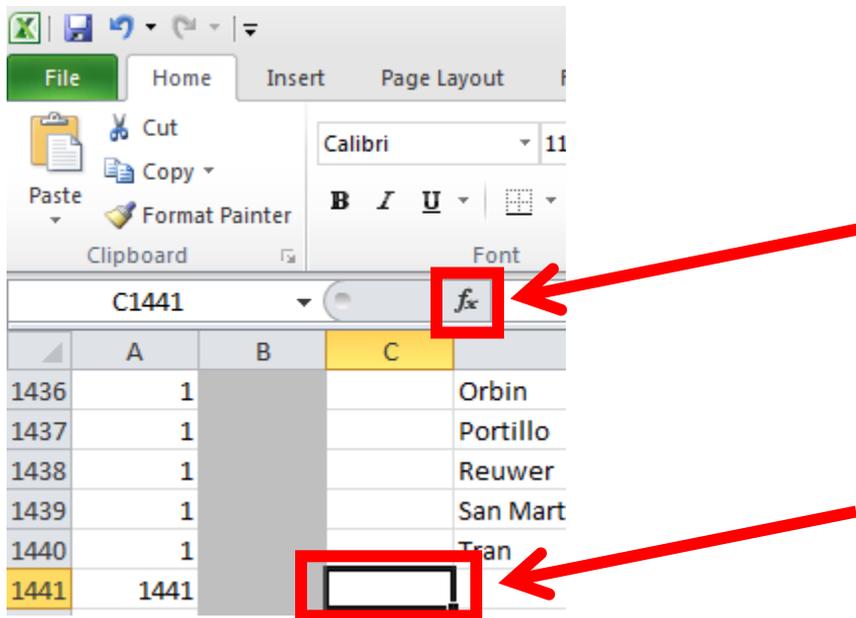
4. In the **Number 1** field, type **B2** (the first cell you want totaled), then type the last cell of column B you want included in the total. For example, (B2:B##)



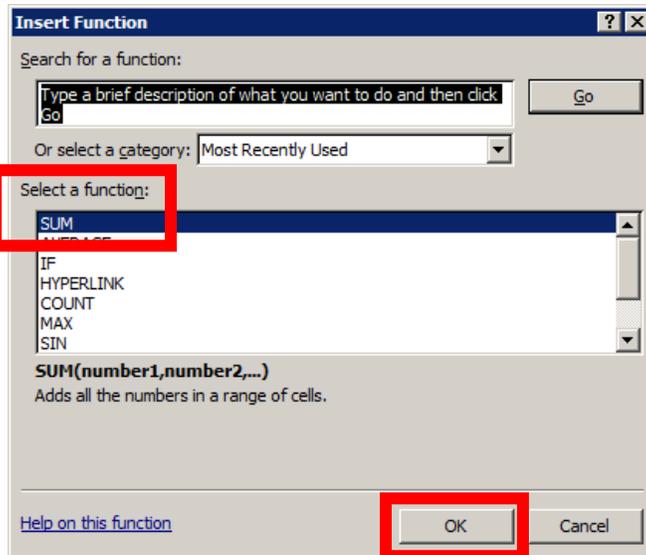
5. Click **OK**. Your report should now have the total number from the **BLANK** column.

LASTLY, TOTAL THE HAVE CARD COLUMN.

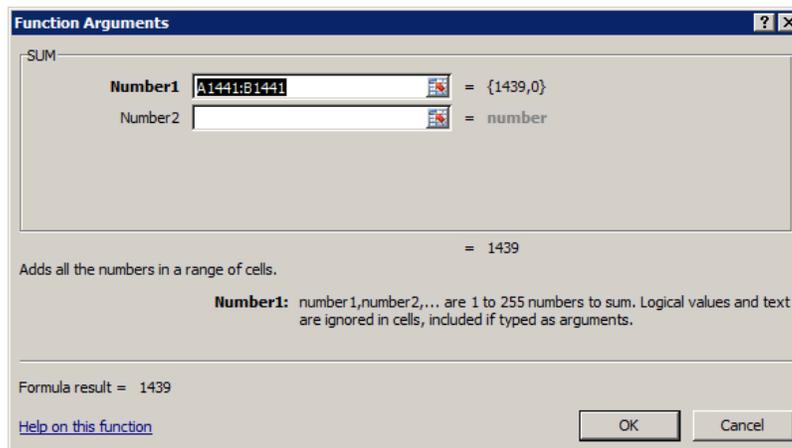
1. Click the cell after the last student in the **HAVE CARD** column on your report. This should be column **C** on your report.
2. Insert the **SUM function**. This can be done multiple ways. One way is to click the **Insert Function** icon in cell C1441 as shown in the screen shot below:



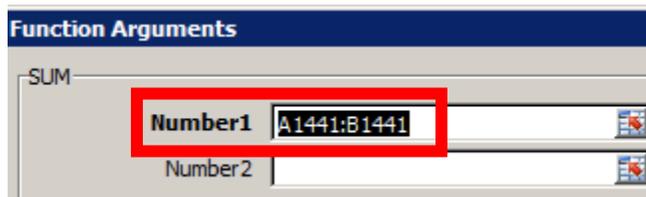
3. Make sure the **SUM** function is selected from the list.



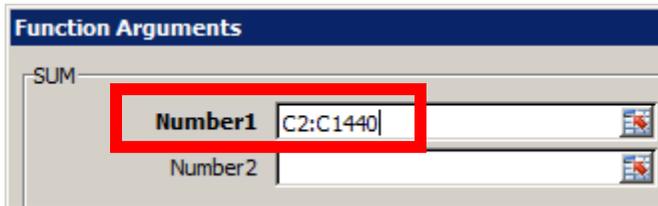
4. Click **OK**. A new window will appear. See the screen shot on the next page.



5. In the **Number 1** field, change the existing numbers to **C2** (the first cell you want totaled), enter a colon symbol, then the last cell you want totaled, in this example it is **C1440**. See the *Before Change* and *After Change* screen shots below. Your first cell number will be **C2**. Your last cell number will be different. It will be the cell number of the last student on your report.



BEFORE CHANGE



AFTER CHANGE

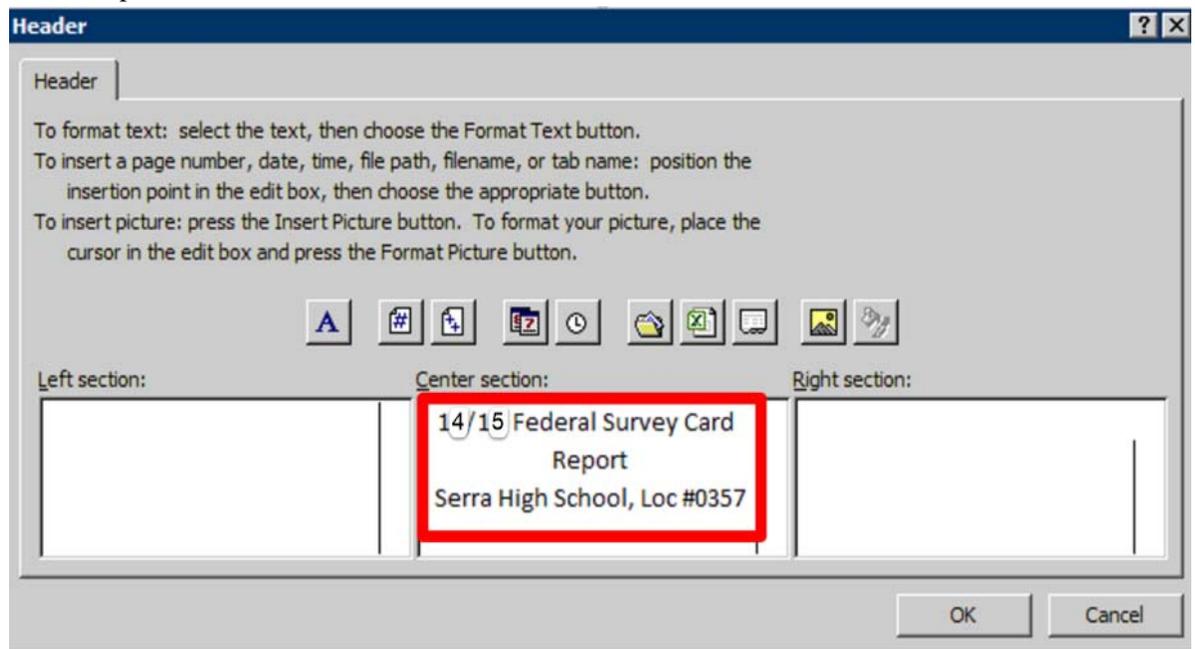
6. Click **OK**.

This number will eventually show the total number of students who have turned in their cards. Right now it should show zero.

NOTE: You can sort the list by teacher, classroom number, or however best suits your needs. It is probably best to keep your list in classroom or teacher order until the end of your survey card collection, but you can resort it to find students by ID number or some other way and then resort to classroom order. However, when submitting the report to the Impact Aid Office, it needs to be sorted by student **Last Name**.

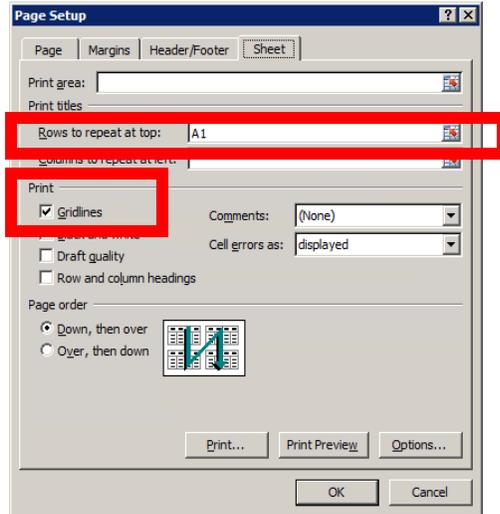
SET UP THE PAGES AND THE HEADER/FOOTER OF THE REPORT

1. Click the **Page Layout** tab > **Margins** > **Custom Margins...** (the words at the bottom, *not* the icon.)
 - a. On the **Page** tab, click the **Landscape** radio button.
 - b. On the **Margins** tab, set **Left** and **Right** to **.25**.
Top to **1**
Bottom to **.5**
Header to **.5**
Footer to **.25**
 - c. On the **Header/Footer** tab, click **Custom Header**
 - d. In the **Center** section, enter the following: **14/15 Federal Survey Card Report**. Press the **Enter** key on your keyboard, and then enter your School name and your location #.
For example:



- e. Click **OK**. (This window closes and returns to the **Header/Footer** tab on the **Page Setup** dialog box.)
- f. Click **Custom Footer** (the cursor should be in the **Left** section)
- g. Click the **Insert File Path icon** . (**&[Path]&[File]** appears. In the printed document, this will show the file path and name.)
- h. Click in the **Right section**.
- i. Click the **# icon** , type the word **of**, press the space bar, and then click the **++ icon** . (This will put page numbers (e.g., **1 of 16**) on your report.)
- j. Click **OK**.
- k. Click the **Sheet** tab:
- l. Check **Gridlines** to include gridlines in the spreadsheet.

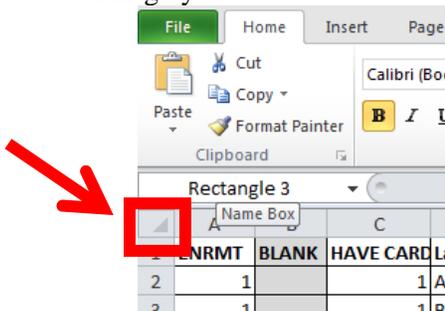
- m. In **Rows to Repeat at Top**, enter **A1**. (This will put your column headers on all pages.)
Your window should look like this:



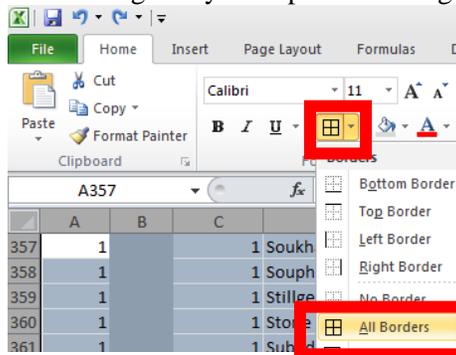
- n. Click **OK** when finished.

MAKE SURE ALL BORDERS IS SELECTED

1. Select your entire report by clicking the arrow to the left of the A cell. The entire Excel report should turn gray.



2. Click on the Borders icon and select **All Borders** from the menu. See screen shot below. This will put gridlines throughout your report including the **BLANK** column.



3. Close the file until you need to use it when students turn in cards. See the next set of instructions on how to use the report.

TEACHERS TURN IN CARDS TO THE OFFICE

1. As cards are turned in by your teachers, enter the numeral **1** in the **HAVE CARD** column for each student for whom a completed card is collected. If you have duplicate cards for a student, staple these together and count as one.
2. Once all cards are entered, you must sort your list alphabetically by student for your entire school.
3. Total *all* of the **1s** in the **HAVE CARD** column.
To total the column, click in the field in the **HAVE CARD** column after your last student and insert the SUM function. See page 5 of this Job Aid for details.
4. Your final report *must* include the following columns:
 - a. **ENRMT**
 - b. **BLANK**
 - c. **HAVE CARD**
 - d. **LAST NAME**
 - e. **FIRST NAME**
 - f. **ADDRESS**
 - g. **BIRTHDATE**
 - h. **STUDENT ID**
 - i. **GRADE NUMBER**
 - i. Click **View** and select **Page Break Preview**.
 - ii. Move the blue lines to include the first 9 columns (A through I), **ENRMT** through **Grade Number**.
 - iii. Hide or Remove the **Teacher, Room #, Period, Course Code** and **Course Description** columns when actually submitting the report. (This will also reduce the number of pages of your report)
5. At the end of the collection, you must alphabetize all of your cards in complete alphabetical order. (In previous years, it was acceptable if the cards were alphabetized in rough alphabetical order, but they now *must* be alphabetized completely.
6. Count all of your cards.
7. Your total on your list should match the number of cards collected. If it doesn't, go through the cards, comparing them to the list until you are balanced to your list. Note name differences on the cards and highlight, putting in order of your alphabetical list. For example, if "David Jones" on card and "David Smith" on list, write "David Smith on list" at top and highlight. You can file it by Smith for comparison purposes to balance your cards to your list.
8. Type your name, phone number and e-mail address at the bottom of the report.
9. Print one copy of the list.
10. Circle the total number of cards on your report.
11. Sign and date the report. See screen shot below:

| | | | | | | | | | |
|------|------|--|---|---|---------|----------------------|-----|-------------------|--------|
| 1437 | 1 | | 1 | Portillo | Anthony | 9340 44TH ST | # C | 07/09/1997 | 508008 |
| 1438 | 1 | | 1 | Reuwer | Brayden | 24991 CTE PLY MERIDA | | 11/27/1997 | 506569 |
| 1439 | 1 | | 1 | San Martin | Jasmine | 5519 ROANOKE ST | | 12/07/1997 | 502552 |
| 1440 | 1 | | | Iran | Lean | 6191 38TH ST | # 1 | 03/02/1996 | 508771 |
| 1441 | 1439 | | | 1427 | | | | | |
| 1442 | | | | Staff member responsible for survey: Jane Doe, Attendance Clerk | | | | <i>X Jane Doe</i> | |
| 1443 | | | | E-mail: jdoe11@sandi.met | | | | | |
| 1444 | | | | Phone #: 619-555-9090 | | | | | |

12. Submit the original and keep a copy with the site employee information, signature and circled total on file at the site until the end of the school year. Also keep the electronic file until the end of the school year.
13. When submitting the report and the actual survey cards, bring them to the **Impact Aid Office, Room 3244** at the Education Center.
14. Please contact that office with any Federal Survey Card questions. See the next page for instructions on **Running Labels for Federal Survey Cards**.

If you encounter PowerSchool-related problems, please contact your school’s PowerSchool Power User or the IT Help Desk at 619-209-HELP (4357).

Running Labels for Federal Survey Cards

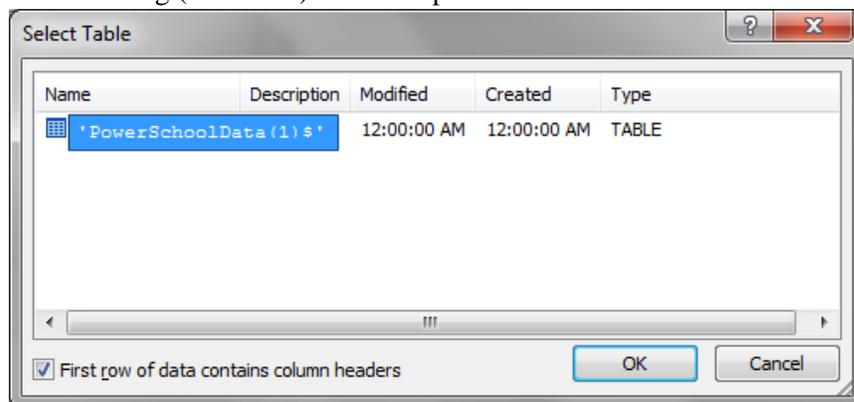
Labels must be attached to the survey cards before they are sent in to the Impact Aid Office. You must run the labels from your **PowerSchool Federal Survey Report**. Go ahead and run the labels when you prepare for the survey, and set them aside. You may wait until cards are completed to attach the labels since you may not know what language card each child needs. Please affix the label in the blank upper right area of the survey cards without covering any of the print.

These labels assist the central office to identify the students since some handwriting is unreadable and we are dealing with a high volume of cards. Also, the name written on the cards is not always the registered name, which makes it hard to find in the student information system.

COMPLETING THE MAIL MERGE IN WORD:

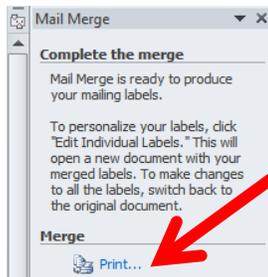
1. Launch **Microsoft Word**.
2. Click the **Mailings** tab
3. Click **Start Mail Merge** > Select **Step by Step Mail Merge Wizard ...**
The **Mail Merge** task pane opens on the right side of the document:
4. Under **Select document type**, click the **Labels** radio button
5. Under **Step 1 of 6** at the bottom of the page, click **Next: Starting document**.
6. Under **Change document layout**, click **Label options** and select the types of labels you are going to print. (Typically **Avery 5167**, but the type of labels you have could be different.)
7. Click **OK**.
8. Under **Step 2 of 6**, click **Next: Select recipients**.
9. Under **Select recipients**, confirm that the **Use an existing list radio button is selected**, and under **Use an existing list**, click **Browse....**
10. When the browse window opens, navigate to your desktop, and **select** the Excel Spreadsheet that you saved earlier, **“FedSurveyCardsXX_cost center of your site.xls”**
11. Click **OK**

The following (or similar) window opens:



(If more than one row is listed in the Select Table window, select the top option)

12. Confirm that **First row of data contains column headers** is checked.
13. Click **OK**.
The **Mail Merge Recipients** window opens:
14. Click **OK**.
15. You should now see the label sheet formatted with the words **Next Record** appearing in each label.
16. At the bottom right, under Step 3 of 6, click **Next: Arrange your labels**.
17. Under **Arrange your labels**, click **More items ...**.
The **Insert Merge Field** window opens. The fields listed match the fields found in your Excel spreadsheet.
18. **Insert** the **desired fields** from the list.
You *must* include **Last Name, First Name, and Student Ident**.
(You could also add Teacher Name or Classroom Number if you will be distributing cards by teacher or classroom.)
19. Close the **Insert Merge Field** window.
20. Edit the label information:
You can add spaces (or commas and spaces) between **each field**, or hit the **Enter** key on your keyboard to add a new line after any field.
21. **Select All** and **change the font size** to have the text better fit your label. (Most users choose 8 or 9 point).
22. **Click the Update all labels** button.
(This changes all the labels to match the first one you formatted.)
23. Under Step 4 of 6, click **Next: Preview your labels**.
24. Under Step 5 of 6, click **Next: Complete the merge**.
25. **IMPORTANT:** To print *all* labels, click **Print...** in the **Mail Merge** box on the right side of the screen.



(If you were to choose **Print** from the **File** menu, **only** the first page of labels would print.)

Sample Federal Survey Card Report

| | A | B | C | D | E | F | G | H | I | J | |
|----|-------|-------|-----------|---|-------------|----------------------|----------|------------|---------------|--------------|--|
| 1 | ENRMT | BLANK | HAVE CARD | Last Name | First Name | Address1 | Address2 | Birthdate | Student Ident | Grade Number | |
| 2 | 1 | | 1 | Aguilon | Samantha | 295 BURTON ST | | 09/02/2006 | 505524 | 0 | |
| 3 | 1 | | 1 | Alatorre Mora | Christopher | 822 KELLY ST | | 07/21/2006 | 505470 | 0 | |
| 4 | 1 | | 1 | Barksdale | Veronica | 8777 VIA LAS CUMBRES | # 6 | 10/05/2006 | 505474 | 0 | |
| 5 | 1 | 1 | | Black | Jacinta | 2104 GLIDDEN ST | | 01/24/2006 | 505547 | 0 | |
| 6 | 1 | | 1 | Brown | Armando | 7191 KELLY ST | # K | 05/10/2006 | 505390 | 0 | |
| 7 | 1 | | 1 | Cavanagh | Julian | 9403 BENICIA ST | # 2 | 05/10/2004 | 505309 | 2 | |
| 8 | 1 | | 1 | Chen | Lee Ann | 7292 GAINES ST | | 09/23/2004 | 505338 | 2 | |
| 9 | 1 | | 1 | Cruz | Cody | 5161 LINBROOK DR | | 01/18/2006 | 505448 | 0 | |
| 10 | 1 | | 1 | De La O | Gabrielle | 6622 COOKIDGE ST | | 07/28/2005 | 505464 | 0 | |
| 11 | 1 | | 1 | Delarosa | Jian Fei | 2509 VIA LAS CUMBRES | # 4 | 11/24/2004 | 505498 | 2 | |
| 12 | 1 | | 1 | Diep | D'Angelo | 3917 LAKE CT | | 06/19/2006 | 505523 | 0 | |
| 13 | 1 | | 1 | Doan | Michael | 5434 LINDA VISTA RD | | 08/08/2003 | 505209 | 2 | |
| 14 | 1 | 1 | | Duran | Zayra | 3614 KELLY ST | | 05/21/2004 | 505374 | 2 | |
| 15 | 1 | | 1 | Enriquez | Isalah | 7062 KELLY ST | | 09/06/2006 | 505521 | 0 | |
| 16 | 1 | | 1 | Ewing | Sherry | 7849 COMSTOCK ST | | 03/27/2004 | 502593 | 2 | |
| 17 | 1 | | 1 | Gallejos | Kevin | 3140 HANFORD DR | | 05/20/2006 | 509742 | 0 | |
| 18 | 1 | | 1 | Galvan | Georsha | 1422 CAMINO DEGRAZIA | # 248 | 03/08/2006 | 505296 | 0 | |
| 19 | 1 | | 1 | Garcia | Aria | 111 MANNING ST | | 05/06/2006 | 502621 | 0 | |
| 20 | 1 | | 1 | Garcia Jimenez | Jordan | 2667 GARSTON ST | # 3 | 01/18/2006 | 505324 | 0 | |
| 21 | 1 | | 1 | Guerrero | Jonathan | 8029 HIGH KNOLL RD | | 10/17/2005 | 502615 | 0 | |
| 22 | 1 | | 1 | Ha | Jackson | 6533 ULRIC ST | | 11/23/2004 | 502594 | 2 | |
| 23 | 1 | | 1 | Hassan | Gerardo | 6901 ACHESON ST | | 07/20/2006 | 505533 | 0 | |
| 24 | 1 | | 1 | Kassissieh | Lawrence | 9078 DRESCHER ST | | 11/10/2004 | 505306 | 2 | |
| 25 | 1 | | 1 | King | Sabrina | 4276 DAVID ST | | 01/19/2004 | 505376 | 2 | |
| 26 | 1 | | 1 | Lam | Gabrielle | 3450 FULTON ST | | 05/16/2005 | 502607 | 0 | |
| 27 | 1 | | 1 | Lardie | Briana | 3734 TAIT ST | | 09/04/2004 | 505233 | 2 | |
| 28 | 1 | | 1 | Lee | Gina | 9482 KELLY ST | | 11/07/2004 | 505366 | 2 | |
| 29 | 1 | | 1 | Meh | Zoe | 3875 WESTINGHOUSE ST | | 10/08/2006 | 505538 | 0 | |
| 30 | 1 | 1 | | Nguyen | Josue | 7136 WESTINGHOUSE ST | | 01/03/2006 | 505551 | 0 | |
| 31 | 566 | 3 | 559 | | | | | | | | |
| 32 | | | | Staff member responsible for survey: Jane Doe, Attendance Clerk | | | | X Jane Doe | | | |
| 33 | | | | Email: jdoe11@sandi.net | | | | | | | |
| 34 | | | | Phone #: 619-555-1234 | | | | | | | |

GENERAL INFORMATION FOR DISTRICT EMPLOYEES

The Federal Survey, or Survey of Residence and Employment, conducted each fall by distributing survey cards to all students in late October (the date is usually the last Friday in October and varies from year to year), brings in over \$8 million each year to the district. These dollars accumulate card by card. This is possible only by surveying each student's parents and collecting the data. They are then sent in to the central office, where the residence and employment is carefully checked to find the federally connected children as outlined below.

The survey is the way in which the district files its claim each year for Impact Aid funds allowed for under Public Law 103-382, Title VIII. This law allows for partial replacement funding for lost property tax revenue due to military installations and other federal property in or near our district. Students whose parents work on federal property (i.e.; a Border Patrol station, Indian casino, the Metro Correctional Center, etc.) or are active duty military either living in non-military housing or military housing will have cards that qualify for funds. Military housing is not necessarily located on a military base. There are 37 military housing complexes in our area. We need to collect a card from every student in the district and personally evaluate the residence and work addresses; many parents are unsure if they work or do not work on federal property. Cards of students living in certain public housing complexes also qualify. Every card of a student that is federally connected drives up the value of the funding claim. The value of the claim is determined by quantities of the types of cards received. Every card helps!

There must be a driving force at each site behind the survey in order to collect every card and ensure the cards are filled out completely. A plan should be put in place and follow-up done periodically to ensure the site is on track in collecting its cards. We need the commitment at the site level or the survey will not bring in the funding that it could.

Teachers can be a driving force and they should be aware of the value of the survey in practical terms.

Parents should be made aware of the importance of returning their completed card to the school. Many parents think this is just another form and do not want to be bothered, especially since the cards go home right after all the "beginning of the year" paperwork has been flowing into their homes. We have added a brief explanation of the purpose of the survey on the back of the card, with a one-line reference to it on the front. Hopefully this will reduce the amount of questions to staff at the sites and encourage the parents to fill out the cards.

A letter should accompany the card, briefly explaining its purpose and encouraging the parents to participate. A template for a parent letter, approved by the central office (in English and Spanish), is enclosed. This should be typed onto your school letterhead. Please follow the instructions at the top of the letter. Do not change the contents of the letter.

For late cards and for better results, notes from the teacher (an informal note is sufficient) are helpful, as the contact is more personal, especially if the parent has met the teacher.

**PRINCIPAL'S CERTIFICATION OF SURVEY CARD RELEASE DATE
AND CONTACT INFORMATION**

DATE:

TO: Impact Aid Office

FROM: School Name _____

SUBJECT: **IMPACT AID SURVEY CARDS DATED OCTOBER 24, 2014**

Please be advised that the 2014-2015 Impact Aid survey cards for students attending this school were sent home to parents for completion on or after October 24, 2014.

No survey cards were released to parents prior to October 24, 2014.

Principal's Signature

**Site contact responsible for collecting and submitting cards:
(Please print or type)**

Name of School Contact

Email address: _____

Phone number including extension: _____

Card Quantity Information: (Please indicate in 100's)

I received:

English: _____ Spanish: _____

I would prefer:

English: _____ Spanish: _____

**Return to: Impact Aid Office
Eugene Brucker Education Center, Room 3244**

**PRINCIPAL'S CERTIFICATION OF
SPECIAL EDUCATION STUDENT INFORMATION**

DATE: October 24, 2014

TO: Impact Aid Office

FROM: School Name_____

SUBJECT: **SPECIAL EDUCATION STUDENTS AS OF OCTOBER 24, 2014**

Attached is a list of all Special Education students enrolled at this school with active IEPs, as of October 24, 2014. This list has been verified and all exceptions have been noted.

I certify this list to be accurate and complete. All student listed have a valid IEP on file.

Principal's Signature

**Return to: Impact Aid Office
Eugene Brucker Education Center, Room 3244**

CHECK LIST FOR TEACHERS

- Collect one survey card from each student (upper grades, from your first period class).
- Remind students who forget to turn in their card to bring them tomorrow.
- Check off each student's name on your roster list as they turn in a survey card to you. Keep this list - it must be turned in to the office daily with completed cards.
- Please check all cards for the following information:
 - The name and address of both student and parent(s) must appear on the card.
 - Employment information must be complete.
 - Military personnel on full time active duty must list their name, branch of service, and their rank in the active duty military section of the card.
 - Signature of parent or guardian is required on all cards. If signature is missing on the card, it must be returned to the parent for completion.
- Please ask students not to fold, spindle, or otherwise damage the cards.



TO: Teachers
CC:
FROM: Pat McCoy
DATE: September 5, 2014
RE: SURVEY OF RESIDENCE AND EMPLOYMENT SURVEY
DATE: OCTOBER 24, 2014

Thank you so much for your support and hard work in conducting the above-referenced survey each year. The district receives over \$8 million annually for its Impact Aid survey claim. The dollars accumulate literally card by card, so every card is important to this claim.

The district receives significant property tax revenue as one of our many funding sources. We do not receive this revenue for federal land, as it is exempt from property taxes.

We have included a paragraph on the back of the card explaining its purpose. Please read it so you will be familiar with the survey purpose and process in the event of questions from students and/or parents. There is a sentence in the top front section of the card referring to the explanation on the back.

Please encourage your students to have their parents fill these cards out completely, as missing information reduces the claim. We must have every home and employment address in order to determine if a student's parent(s) is/are "federally connected", which means they live/and or work on federal property. Military personnel must list their branch of service and rank.

A suggestion for successful card collection is rewarding the class as a whole when 100 percent completion has been attained. Rewards or incentives prove to be much more successful than penalizing students. Please note that detention or Saturday school is not to be used to urge students to turn in their cards. For students who haven't returned cards a hand written note on the card to the parent has been a successful technique, as the teacher, of all school staff, has the closest relationship with the parent. An example is "Please return so our class may reach 100 percent completion. Thanks, _____"

Together we can have a successful survey and maintain our level of funding. We sincerely appreciate every effort on your part to contribute to the value of this year's claim!

PARENT SURVEY LETTER TEMPLATE (ENGLISH)

(Place on school letterhead)

Date

Dear Parent or Guardian,

Your help and support with securing federal funding for our schools would be greatly appreciated.

Each year our district receives over \$8 million in Impact Aid funding. This is not automatic – we must apply for it each year. The U. S. Department of Education requires that a survey be conducted on a common day every year and a claim be filed based upon the cards received. We are not allowed to use enrollment cards for this purpose.

In order to apply, we need information from you. Your response helps increase the dollar value of the district's claim.

Please fill out the enclosed card completely and return it to us. *The information should be for the date of October 24, 2014*, the survey date for this year. These cards are kept confidential and are used for the purposes of filing this claim only.

Thank you very much for your time and for helping us to obtain this valuable funding for our students.

Sincerely,

Name of Principal

Name of School

NOTE: This letter is approved for Impact Aid Program use only. **Do not** change the contents of this letter other than to add school letterhead, date, principal and school names. Once you have copied this letter onto your letterhead, please remove the heading at the top of the page along with this entire paragraph.

PARENT SURVEY LETTER TEMPLATE (SPANISH)

(Place on school letterhead)

Date

Estimado padre, madre o tutor:

Le estaremos muy agradecidos si nos presta su ayuda y apoyo para asegurar que nuestras escuelas reciban fondos federales.

Cada año, nuestro distrito recibe más de \$8 millones en financiamiento para Ayuda de Impacto. Esta suma no es automática, ya que cada año debemos solicitarla. El Departamento de Educación de los Estados Unidos requiere que se haga una encuesta anual durante un día común de labores y que cada escuela presente una solicitud basada en el número de tarjetas de la encuesta que recibamos. No se nos permite usar las tarjetas de inscripción para este propósito.

Con el fin de hacer nuestra solicitud, necesitamos información de usted. Su respuesta nos ayudará a aumentar el valor de la suma que solicitemos.

Por favor, llene la tarjeta adjunta y entréguenosla. *La información debe tener la fecha del 24 de octubre de 2014*, la cual es la fecha de nuestra encuesta de este año. Estas tarjetas se mantienen confidenciales y se usan únicamente para fines de nuestra solicitud de fondos.

Mucho le agradecemos el tiempo que dedique para ayudarnos a obtener estos valiosos fondos para nuestros alumnos.

Atentamente,

Name of Principal

Name of School

NOTE: This letter is approved for Impact Aid Program use only. **Do not** change the contents of this letter other than to add school letterhead, date, principal and school names. Once you have copied this letter onto your letterhead, please remove the heading at the top of the page along with this entire paragraph.

PARENT SURVEY LETTER TEMPLATE (SOMALI)

(Place on school letterhead)

Date

Mudane Waalid ama Qofka ilmaha masuulka ka ah,

Waxaan kaaga mahadcelineynaa taageerada iyo kaalmada aad ka geysato si loo sugo helitaanka deeqda lacageed ee dawlada-dhexe.

Sannad kasta waxay waxbarashadda degmadu heshaa deeq lacageed oo dhan \$8 malyan, deeqdaasna waxaa loo yeqaanaa Impact Aid funding. Lacagtaasu maaha mid iska timaada – ee waan inaan sannad kasta soo dalbanaa. Waaxda Waxbarashadda ee Maraykanku waxay u baahan tahay inaan maaali gaar ah oo la cayimay sannad kasta baadhitaankaas la sameeyo, kedibna kaadhahkaas la helay codsiga lagu soo gudbiyo. Lama oggola Kaadhahka diiwaangelinta inaan codsigan u istimaalo.

Si aan deeqdaas lacageed u codsano, waxaan kaaga baahanahay warbixin. Jawaabta aad na soo siisid waxay kor u qaadaysaa qiimaha doolarka ee codsiganaga.

Fadlan waxaad si dhammeystiran u soo buuxisaa kaadhka halkan gudaha ugu jira, kedibna noo soo celi. *Taariikhda warbixintas la rabo waa 10/24/14*, waa taariikhda aan sannadkan baadhitaanka sameynayno. Kaadhahkanu waa kuwo qarsoodi ah, waxaana loo isticmaaleyaa in dalabkaas lagu gudbiyo oo keliya.

Waad ku mahadsan tahay wakhtiga aad u hurtay inaan ardeydeena uu helo deeqdaas lacageed.

Si daacadnimo ah,

Name of Principal

Name of School

NOTE: This letter is approved for Impact Aid Program use only. **Do not** change the contents of this letter other than to add school letterhead, date, principal and school names. Once you have copied this letter onto your letterhead, please remove the heading at the top of the page along with this entire paragraph.

HINTS: SUCCESSFUL COLLECTION OF SURVEY CARDS

*(As suggested by numerous district employees
who have achieved great results in collecting survey cards.)*

- Tape or paste the homeroom/classroom rosters to a large envelope. Have teachers check off names of students who have turned in cards. If any names are unchecked, send the envelope back with blank survey cards and highlight the names for the teacher to work on. The envelopes may go back and forth until the survey is completed.
- Keep cards in a box while working on them. Keep cards grouped by classroom until all cards are returned. List names of missing cards on top of each group so you will know which teachers need to contact which students.
- Notify teachers immediately when cards are missing or lacking information. Highlight the name of the child and enclose a new card or highlight the missing information and return the card to the teacher.
- Let teachers know that if they do not obtain cards from every student, the students who are missing cards will be sent for and may lose valuable class instruction time.
- Teachers should decide what methods to use to get difficult children to take the card home and return them. Teachers may not use detention or Saturday school to urge students to turn in cards.
- Some teachers are more successful than others at getting their students to bring in the cards. Interview them to find out what works and share this information with all the teaching staff.
- Reward the first five classrooms that reach 100 percent with popcorn or ice cream party or other incentive. Some schools leave it up to the teacher to provide incentives to the class.
- Keep a list of missing cards at the front desk. If a parent whose child has not turned in a card comes to the office, have them fill it out before they leave.
- Pressure: Discuss any ideas for applying pressure with your principal before following through and then send for students. Explain to them nicely why we need the card and have them promise to bring the card in on the following day. Call them in if they forget.
- Incentive: Withhold something students need or want until survey card is returned to school. Example: ID card.
- Keep at it. Do not let too much time go by or the task will become impossible. Work at it until finished. Find self-satisfaction in doing a complete job. Have a will-do attitude
- Use whatever method works for your school and community. Not all of the methods are appropriate for your school.
- Arrange a meeting in the auditorium for students who haven't returned their survey cards to explain the importance of the survey and request them to comply.

Hints: Successful Collection of Survey Cards

Page 2

- For schools that have parent conferences in November, have teachers give cards to parents who come in for conferences and have them fill out the card during the conference.
- For schools with families on CalWORKS, have the card ready for the parent to fill out in exchange for the proof of school attendance for social services.
- Always be truthful with parents regarding the nature of the survey. Do not tell them something that cannot be confirmed by the Impact Aid Office. For example, “your child cannot continue attending our school unless you fill out a card.”
- It is important to maintain good rapport with the parent and not alienate them. Explain that the information is completely confidential and that it helps the district obtain money, allowed for by a public law, as noted on the back of the card. If a parent/guardian still absolutely refuses, even after you have explained the need, make a note of it and attach a copy of the student’s K-12 enrollment card to the survey card and send it in with the completed cards.

*FEDERAL PROPERTY LIST

| | |
|---|--|
| Air Force Plant #19 (Spawars) | 4297 Pacific Hwy. |
| Army Reserve Training Center | Mission Gorge Rd. area |
| Border Patrol Station | Campo |
| Border Patrol Station | Chula Vista |
| Border Patrol Station | El Cajon |
| Border Patrol Station | Otay Mesa |
| Border Patrol Station | San Ysidro |
| Border Patrol Station | Tecate |
| Cabrillo National Monument | Point Loma |
| Casinos | Various, on Indian Reservations |
| Coast Guard Air Station | 2710 Harbor Dr. |
| Coast Guard Light Station | Ballast Point |
| Coast Guard Light Station | Point Loma |
| Federal Building | 880 Front St. |
| Federal Court House | 940 Front St. |
| Fort Rosecrans National Cemetery | Point Loma |
| Inter-American Tropical Tuna Commission | 8604 La Jolla Shores Dr. |
| Job Corps | 1325 Iris Ave., Brown Field |
| La Jolla Biological Laboratory | 8604 La Jolla Shores Dr. |
| Marine Corps Air Station | Miramar |
| Marine Corps Base | Camp Pendleton |
| Marine Corps Recruit Depot | Barnett Ave. |
| Metropolitan Correctional Center | 808 Union St. |
| National Marine Fisheries Services | 8804 La Jolla Shores Dr. |
| Naval Air Station, Outlying Landing Field | Ream Field |
| Naval Amphibious Base | Silver Strand |
| Naval Base Hdqtrs., 11 th Naval District | 937 N. Harbor Dr. |
| Naval Base Hdqtrs., 11 th Naval District | 921 W. Broadway |
| Naval Communication System | 937 N. Harbor Dr. |
| Naval Degaussing Station | Point Loma |
| Naval Electronics Engineering Center | 4297 Pacific Hwy. |
| Naval Facilities Engineering Command | 1220 Pacific Hwy. |
| Naval Health Research Center | Point Loma |
| Naval Hospital | Balboa Park |
| Naval Ocean Systems Center | 271 Catalina Blvd. |
| Naval Personnel Research Activity | 272 Catalina Blvd. |
| Naval Radio Station | Chollas Heights |
| Naval Radio Station | Coronado Heights |
| Naval Reserve Readiness Command | 960 N. Broadway |
| Naval Sea Support Center – Pacific | 4297 Pacific Hwy. |
| Naval Shore Electronics Engineer Activity | 4008 Rosecrans |
| Naval Shore Electronics Engineer Activity | 4635 Pacific Hwy. |
| Naval Shore Electronics Engineer Activity | 4008 Taylor St. |
| Naval Shore Patrol Hdqtrs. | 726 Second Ave. |
| Naval Station, 32 nd St. | 32 nd St. & Harbor Dr. |
| Naval Submarine Support Facilities | Sylvester Rd., Ballast Point |
| Naval Supply Center | 937 N. Harbor Dr. |
| Naval Supply Center, Fuel Annex | Point Loma |
| Navy Exchange Service Center, Bldg. 3155 | 32 nd St Nav Stn, 8 th & Nat'l |
| Navy Fleet Anti-Air Warfare Training Center | Point Loma |
| Navy Fleet Anti-Submarine Warfare Training Center | Point Loma |
| Navy Recreation Center (Admiral Baker Field) | Mission Gorge Rd. area |
| Nuclear Generating Plants #1, #2, #3 | San Onofre |
| Scripps Field Annex, Oceanic Research | Ballast Point |
| Scripps Field Annex, Marine Physical Laboratory | Point Loma |
| Scripps Field Annex, Visibility Laboratory | Point Loma |
| Southwest Fisheries | 8604 La Jolla Shores Dr. |
| Veterans Administration Hospital | 3350 La Jolla Village Dr. |
| Village at NTC | Point Loma |

*Note: This is a partial list of the most common federal properties in the area.