

**Request for Program Transfers and/or Services
Activities and Timelines Checklist**

Directions:

This form is to be completed by any Local Educational Agency (LEA) in Santa Barbara County Special Education Local Plan Area (SELPA) requesting a program transfer. Program transfers include give backs, take backs, give back/take back combinations, and program closures. Transfers may proceed on a regular track, fast track, or late track as defined in AR 3208. LEAs will follow the regular track unless exceptional or uncommon and unforeseen factors apply. Each step must be submitted by the due date to the SELPA Executive Director and other applicable persons as noted. For regular track transfers, the LEA must confer with the other LEA(s) involved and the SELPA Executive Director during August through October, and submit a Letter of Intent to the SELPA by November 1. The SEAM will review requests at the November SEAM meeting and make a recommendation to the JPA Board, which votes at its February meeting. The receiving LEA must then submit a fully developed plan by November 1 of the following fiscal year and confirm completion of plan activities by February 1 of that same year, prior to the program transfer taking effect.

Name of LEA requesting program transfer and /or services: _____

Step 1 – Pre-Submission Conference, Consultation, and Letter of Intent

| Activity | Date Due | Evidence of Activity Submitted to SELPA | SELPA Executive Director Initials | JPA Board Approval Date |
|--|--|---|-----------------------------------|-------------------------|
| 1) Identify type of program transfer requested: give back, take back, give back/take back combination, or program closure; and track: regular, fast track, or late track | August 1 – October 31 (conference); November 1 (Letter of Intent) | | | |
| 2) Conference and consultation with all affected LEA(s) and SELPA Executive Director during August through October preceding the November 1 deadline | | | | |
| 3) Letter of Intent submitted to SELPA by November 1, including commitment to address all required elements (a)–(g) below a) Pupil needs – description of required services and descriptive information regarding affected pupils b) Availability of the full continuum of services to affected pupils, including proposed transfer of personnel, materials, equipment, and assessments c) Proposed functional continuation of current IEPs of all affected pupils d) Proposed provision of services in the least restrictive environment (LRE) from which affected pupils can benefit e) Proposed maintenance of all appropriate support services f) Assurance of compliance with all federal and state laws and regulations, SELPA JPA, local plan, policies, and procedures, including how this was addressed in the conference and consultation process g) Means through which LEA staff and parents were represented in the planning process | November 1 | | | |

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| 4) For fast track or late track: letter also includes the exceptional/uncommon circumstances justifying the expedited or late request | | | | |
| 5) SELPA Executive Director meets with requesting LEA after submission | November SEAM meeting (recommendation); December JPA Board meeting (info item); February JPA Board meeting (vote) | | | |
| 6) SELPA Executive Director meets with directly affected LEA(s) (e.g., proposed receiving LEA) | | | | |
| 7) Request presented as information item at December JPA Board meeting | | | | |
| 8) SEAM reviews and analyzes request and makes recommendation to JPA Board at November SEAM meeting | | | | |
| 9) JPA Board votes to approve or decline at February Board meeting | | | | |
| 10) After approval, SELPA Executive Director reviews program transfer with parents at CAC meeting | | | | |
| Comments: | | | | |

Step 2-Submission of Fully Developed Program Plan (Due November 1 of the Fiscal Year Following JPA Board Approval)

| Activity | Date Due | Evidence of Activity Submitted to SELPA | SELPA Executive Director Initials | JPA Board Approval Date |
|--|--|---|-----------------------------------|-------------------------|
| 1) Evidence pupil needs within the SELPA can be met | November 1 of the fiscal year following JPA Board approval | | | |
| 2) Evidence availability of a full continuum of services to affected pupils has been considered | | | | |
| 3) Evidence continuation of current IEPs of affected pupils has been considered | | | | |
| 4) Evidence provision of services and LRE for affected pupils has been considered | | | | |
| 5) Evidence of maintenance of all IEP support services has been considered | | | | |
| 6) Assurance statement that there will be compliance with all federal and state laws and regulations and SELPA policies | | | | |
| 7) Evidence LEA staff were represented in the planning process for both the sending and receiving LEA | | | | |
| 8) Plan for transfer of materials and equipment (items billed/embedded in fees transfer to receiving LEA; low incidence funding items remain with student per state law) | | | | |
| 9) Plan for facilities and physical changes proposed to occur when the transfer is made | | | | |
| 10) Plan for transfer of student records from sending program to receiving program | | | | |

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| 11) SELPA Executive Director may present concerns to JPA Board for reconsideration of approval if plan implementation raises concerns | | | | |
| Comments: | | | | |

Step 3 – Confirmation of Completed Plan Activities (Due February 1 of the Following Fiscal Year)

| Activity | Date Due | Evidence of Activity Submitted to SELPA | SELPA Executive Director Initials | JPA Board Approval Date |
|---|--|---|-----------------------------------|-------------------------|
| 12) Confirmation that plan activities addressing items (a) through (g) have been completed, submitted to SELPA by February 1 of the fiscal year following approval (e.g., for approval in February 2026, confirmation due February 1, 2027) | February 1 of the fiscal year following JPA Board approval | | | |
| Comments: | | | | |