



Submitted by: Marlene Rutledge

Date: 08/30/24

Budget Transfer: ☐
(within Function only)

Budget Amendment: ☒
(between Functions)
** BOT Approval Required**

Approved by: _____
Head of School (for Budget Amendments)

Fund	Funct	S/O	Org	PIC	EdSp	Proj		Obj	Account Number Description	Purpose of Amendment	Adopted Budget Amount	From Amt	To Amt	Amended Budget Amount
EXAMPLE:														
1994	11	00	001	11	0	00		6398	Instructional Technology	set up new account	10,000.00	1,000.00		9,000.00
1994	11	00	001	22	0	00		6399	CTE Supplies		-		1,000.00	1,000.00
1995	11	MS	001	11	0	01		6495	Gen Op Instr MS Prof Fees & Dues	Duplicate budget-already a budget in 1995-11-MS-001-11-000-6495	500.00	(500.00)		-
1995	31	MS	001	99	0	00		6399	Gen Op Cnsl MS Supplies	Supply account was not set up for MS	-		500.00	500.00
														-
														-
														-
														-
														-
BUDGET UNIT			Account		Title				Budget	YTD Expense	Encumbrances	Balance		-
199511MS00111000			6399		GEN OP INSTR MS SUPPLIES				3,000.00	409.90	359.41	2,230.69		-
199511MS00111000			6495		GEN OP INSTR MS PROF FEES & DUES				500.00	0.00	0.00	500.00		-
199511MS00111001			6495		GEN OP INSTR MS PROF FEES & DUES				500.00	0.00	0.00	500.00		-
199531MS00199000			6399		GEN OP CNSL MS SUPPLIES				0.00	0.00	0.00	0.00		-
199531MS00199000			6411		GEN OP MS CNSL EE TRVL & TRNG				2,000.00	0.00	0.00	2,000.00		-
199531MS00199000			6495		GEN OP MS GDNC/CNSL PROF FEES & DUES				300.00	0.00	0.00	300.00		-
GRAND TOTAL											500.00	(500.00)	500.00	500.00



Westlake Academy FY 2024-2025 Request to Change Budget

Submitted by: Marlene Rutledge

Date: 07/15/24

Budget Transfer: ☐
(within Function only)

Budget Amendment: ☒
(between Functions)
** BOT Approval Required**

Approved by: SLA's approved by Dr. Ritchie & BOT after
budget adoption
Head of School (for Budget Amendments)

Fund	Funct	S/O	Org	PIC	EdSp	Proj		Obj	Account Number Description	Purpose of Amendment	Adopted Budget Amount	From Amt	To Amt	Amended Budget Amount
EXAMPLE:														
1994	11	00	001	11	0	00		6398	Instructional Technology	set up new account for CTE supplies	10,000.00	1,000.00		9,000.00
1994	11	00	001	22	0	00		6399	CTE Supplies		-		1,000.00	1,000.00
1995	12	00	001	11	0	00		6411	Gen Op Sec Library Trvl & Trng	Incr	1,000.00		1,100.00	2,100.00
1995	23	00	001	99	0	00		6411	Gen Op Cmps Ldr 504 Trvl & Trng	New Acct 504 Coordinator	-		2,000.00	2,000.00
1995	41	00	750	99	0	FN		6411	Gen Op FN Trvl & Trng	Incr	1,200.00		5,500.00	6,700.00
1995	21	DP	001	11	0	00		6411	Gen Op DP Instr Crd Trvl & Trng	Incr	1,110.00		1,890.00	3,000.00
1995	31	HS	001	99	0	00		6411	Gen Op HS Cnsl Trvl & Trng	Incr	2,000.00		1,000.00	3,000.00
1995	21	PP	001	11	0	00		6411	Gen Op PYP Instr Crd Trvl & Trng	Incr	-		1,000.00	1,000.00
1995	23	ES	001	99	0	00		6411	Gen Op Sch Ldr ES Trvl & Trng	Incr	-		2,000.00	2,000.00
1995	53	00	001	99	0	00		6411	Gen Op Tech Trvl & Trng	Incr	1,500.00		6,500.00	8,000.00
1995	31	HS	001	38	0	00		6411	Gen Op HS CCMR Cnsl Trvl & Trng	Incr	3,000.00		1,540.00	4,540.00
1995	11	MS	001	11	0	00		6119	Gen Op MS Instr Salary Prof	Incr 0.5 FTE for Alg 1 Tchr	1,423,241.00		39,000.00	1,462,241.00
1995	51	00	001	99	0	00		6129	Gen Op Fac Salary	Incr 1.0 Bldg Technician	42,932.00		60,840.00	103,772.00
1995	61	00	001	99	0	00		6119	Gen Op Prof Salary	Salary increase (SM) funded by WAF	112,746.00		30,000.00	142,746.00
1995	61	00	001	99	0	00		6129	Gen Op Para-Prof Salary	Salary increase (JK) funded by WAF	26,577.00		7,364.00	33,941.00
1995	00	04	000	00	0	00		R5744	Gen Op WAF EE Salary Reimb	WAF salary increase	-		37,364.00	37,364.00
1995	00	05	000	00	0	00		R5744	Gen Op TOW EE Salary Reimb	TOW 25% of Facility position	-		15,210.00	15,210.00
1995								3700	Gen Op Budgetary FB		(445,789.45)	(212,308.00)		(658,097.45)
										GRAND TOTAL	1,169,516.55	(212,308.00)	212,308.00	1,169,516.55

Westlake Academy			Updated to document the status of approval.					
Budget 2024-2025								
Service Level Adjustment Requests								
Status	Type	Category	Title	Amount	Status	Approved Amount	Account to Update	
Referred	Expanded Service	Programmatic	IB Curriculum Evaluation - PYP	\$ 3,816	Apprvd by BOT 6/17/24		Incl on 5-yr forecast	
Referred	Expanded Service	Programmatic	IB Curriculum Evaluation - MYP	\$ 3,859	Apprvd by BOT 6/17/24		Incl on 5-yr forecast	
Referred	Expanded Service	Programmatic	IB Curriculum Evaluation - DP	\$ 3,965	Apprvd by BOT 6/17/24		Incl on 5-yr forecast	
Referred	Expanded Service	Programmatic	IB Exam Expenses	\$ 850	Apprvd by BOT 6/17/24		Incl on 5-yr forecast	
Referred	Expanded Service	Programmatic	IB Exam Venue	\$ 1,500	Apprvd by BOT 6/17/24		Incl on 5-yr forecast	
Referred	Expanded Service	Programmatic	SAT/PSAT Exams	\$ 800	Apprvd by BOT 6/17/24		Incl on 5-yr forecast	
Referred	Maintain Service Level	Programmatic	Increased League Membership Fees (Athletics)	\$ 2,000	Apprvd by BOT 6/17/24		Incl on 5-yr forecast	
Referred	Maintain Service Level	Technology	Replace SMART TVs	\$ 42,000	Apprvd by BOT 6/17/24		Incl on 5-yr forecast	
Referred	Maintain Service Level	Training/Travel	Library Travel (Secondary)	\$ 1,100	Apprvd by BOT 7/15/24	\$ 1,100	1995-12-00-001-11-000-6411	
Referred	New/Pilot	Training/Travel	MYP Employee Travel (504/Testing)	\$ 2,000	Apprvd by BOT 7/15/24	\$ 2,000	1995-23-00-001-99-000-6411	
Referred	Expanded Service	Training/Travel	Training for Finance Staff	\$ 5,500	Apprvd by BOT 7/15/24	\$ 5,500	1995-41-00-750-99-0FN-6411	
Referred	Expanded Service	Training/Travel	DP Coordinator Travel Budget	\$ 1,890	Apprvd by BOT 7/15/24	\$ 1,890	1995-21-DP-001-11-000-6411	
Referred	Expanded Service	Training/Travel	HS Counselor Travel & Training	\$ 1,000	Apprvd by BOT 7/15/24	\$ 1,000	1995-31-HS-001-99-000-6411	
Referred	Expanded Service	Training/Travel	PYP Coordinator Travel	\$ 1,000	Apprvd by BOT 7/15/24	\$ 1,000	1995-21-PP-001-11-000-6411	
Referred	Expanded Service	Training/Travel	ES PYP Asst Principal Travel	\$ 1,000	Apprvd by BOT 7/15/24	\$ 1,000	1995-23-ES-001-99-000-6411	
Referred	Expanded Service	Training/Travel	ES PYP Principal Travel	\$ 1,000	Apprvd by BOT 7/15/24	\$ 1,000	1995-23-ES-001-99-000-6411	
Referred	Expanded Service	Training/Travel	IT Staff Training	\$ 6,500	Apprvd by BOT 7/15/24	\$ 6,500	1995-53-00-001-99-000-6411	
Referred	Expanded Service	Training/Travel	HS CCM Travel	\$ 1,540	Apprvd by BOT 7/15/24	\$ 1,540	1995-31-HS-001-38-000-6411	
Referred	Maintain Service Level	Personnel	Salary Adjustments for Paraprofessionals	\$ 17,000	absorb	\$ -	1995-11-00-001-23-000-6129	Falcon, Lloyd, Fretwell, Sansone
						\$ -	1995-11-ES-001-11-000-6129	Rine, Ludwig, Reiswig, Rehman, Hales
						\$ -	1995-11-ES-001-23-000-6129	Ruiz, Kennedy
						\$ -	1995-23-00-001-99-000-6129	Guillet, Quintana, Eberling, Carrabine
						\$ -	1995-61-00-001-99-000-6129	Kelly
Referred	Expanded Service	Personnel	Increase 0.5 FTE for 1 FT Algebra I Teacher	\$ 39,000	Apprvd by BOT 7/15/24	\$ 39,000	\$35,634 MS Tchr	
Referred	Maintain Service Level	Personnel	Reallocate FTEs for Gmtry, VA, Bus Mgmt., & Eng	\$ (3,366)	absorb	\$ -	1995-11-MS-001-11-000-6119	
Referred	Expanded Service	Personnel	1.0 FTE SPED Teacher	\$ 78,000	not approved	\$ -	1995-11-00-001-23-000-6119	
Referred	Expanded Service	Personnel	1.0 Building Technician (75% Funded)	\$ 60,840	Apprvd by BOT 7/15/24	\$ 60,840	1995-51-00-001-99-000-6129	ttl \$76,050 (75% \$60,840; 25% \$15,210)
Referred	Expanded Service	Personnel	Upgrade Asst. Registrar to Registrar	\$ 7,500	not approved	\$ -	1995-23-00-001-99-000-6129	
Referred	Expanded Service	Technology	Gen Op Supplies Technology (504/ESL)	\$ 4,500	absorb	\$ -		
Referred	Maintain Service Level	Technology	Trakstar Evaluations	\$ 800	absorb	\$ -		
Referred	Expanded Service	Technology	Athletic Co-curricular Technology	\$ 2,400	absorb	\$ -		
Referred	New/Pilot	Technology	TASB Policy Library	\$ 500	absorb	\$ -		
Referred	Expanded Service	Technology	HS Technology	\$ 4,000	absorb	\$ -		
Referred	Expanded Service	Technology	Security Cameras	\$ 100,000	funded by grant	\$ -		
Referred	New/Pilot	Personnel	Wellness Incentives	\$ 500	absorb	\$ -		
Referred	Expanded Service	Personnel	0.0 Net FTE Secondary Librarian	\$ -				
			Salary Increase WAF Exec Director			\$ 30,000	1995-61-00-001-99-000-6119	fnds rec'd from WAF
			Salary Increase WAF Admin Asst			\$ 7,364	1995-61-00-001-99-000-6129	fnds rec'd from WAF
			TOTAL REQUESTED	\$ 392,994		\$ 159,734		
							\$ (37,364)	Added revenue from WAF
							\$ (15,210)	Added revenue from Town for Bldg Tech
							\$ 107,160.00	Increased exp from SLAs



Westlake Academy FY 2024-2025 Request to Change Budget

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Date: 09/23/24

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(within Function only)

Budget Amendment: ☒
(between Functions)
** BOT Approval Required**

Approved by: Kelly Ritchie 10/3/24
Head of School (for Budget Amendments)

Fund	Funct	S/O	Org	PIC	EdSp	Proj	Obj	Account Number Description	Purpose of Amendment	Adopted Budget Amount	From Amt	To Amt	Amended Budget Amount
EXAMPLE:													
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1994	11	00	001	22	0	00	6399	CTE Supplies		-		1,000.00	1,000.00
1995	23	00	001	23	0	00	6399	Gen Op Cmps Ldr SPED Supplies	Account not budgeted	-		1,000.00	1,000.00
1995	23	ES	001	99	0	00	6399	Gen Op Cmps Ldr ES Supplies	Account not budgeted	-		1,000.00	1,000.00
1995	23	MS	001	99	0	00	6399	Gen Op Cmps Ldr MS Supplies	Account not budgeted	-		1,000.00	1,000.00
1995	23	HS	001	99	0	00	6399	Gen Op Cmps Ldr HS Supplies	Account not budgeted	-		1,000.00	1,000.00
													-
1995	51	00	001	99	0	HR	6429	Gen Op Commercial Ins	Budget overage	159,108.00	(4,000.00)		155,108.00
													-
	BUDGET UNIT		Account		Title			Budget	YTD Expense	Encumbrances	Balance		-
	1995230000123000		6399		GEN OP SCH LDR SPED SUPPLIES			0.00	0.00	0.00	0.00		-
	1995230000199000		6399		GEN OP SCH LDR ADM SUPPLIES			150.00	127.99	0.00	22.01		-
	199523E500199000		6399		GEN OP CMPS LDR ES SUPPLIES			0.00	0.00	0.00	0.00		-
	199523HS00199000		6399		GEN OP CMPS LDR HS SUPPLIES			0.00	0.00	0.00	0.00		-
	199523MS00199000		6399		GEN OP CMPS LDR MS SUPPLIES			0.00	0.00	0.00	0.00		-
								GRAND TOTAL		159,108.00	(4,000.00)	4,000.00	159,108.00



Date: 10/08/24

Budget Amendment: ☒
(between Functions)
**** BOT Approval Required****

Approved by: Kelly Ritchie
Head of School (for Budget Amendments)

[illegible]