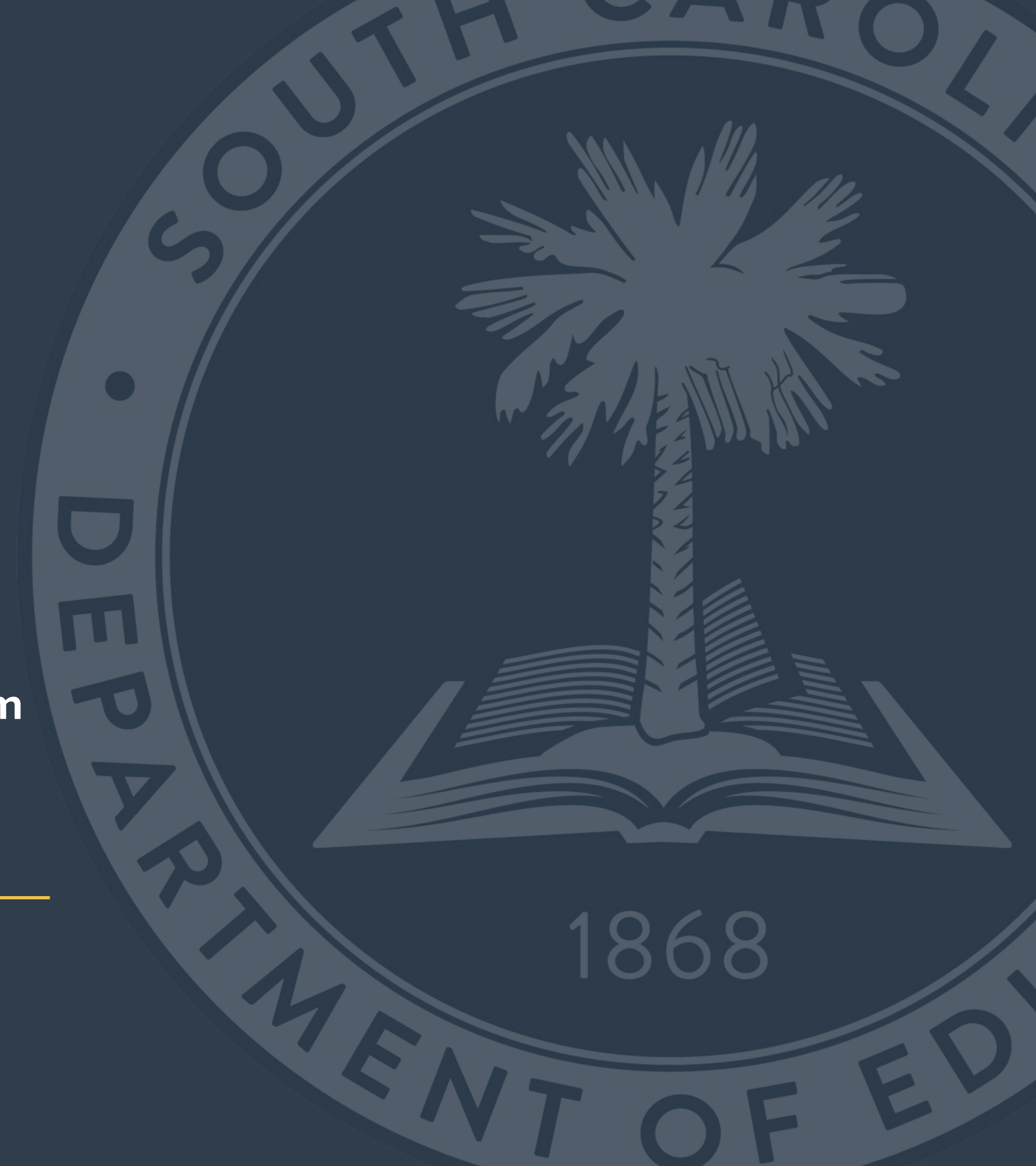


Title I, Part A

Coordinator's Training

Consolidated Finance and Applications Team

July 2025



Day One Agenda

- **General Information**
- **Key Components for Title I**
- **Uses of Funds**
- **Required LEA Set Asides**
- **Fiscal Expectations**
- **New Update-N&D**



What is Title I?

- Title I is the first title in the ESEA of 1965 as reauthorized as the NCLB Act of 2001 and now as ESSA of 2015.
- Title I is the largest federal aid program for K-12 schools.
- The purpose is to ensure that all students have a fair, equal, and significant opportunity to obtain a high-quality education and reach, at a minimum, proficiency on challenging state academic achievement standards and assessments.



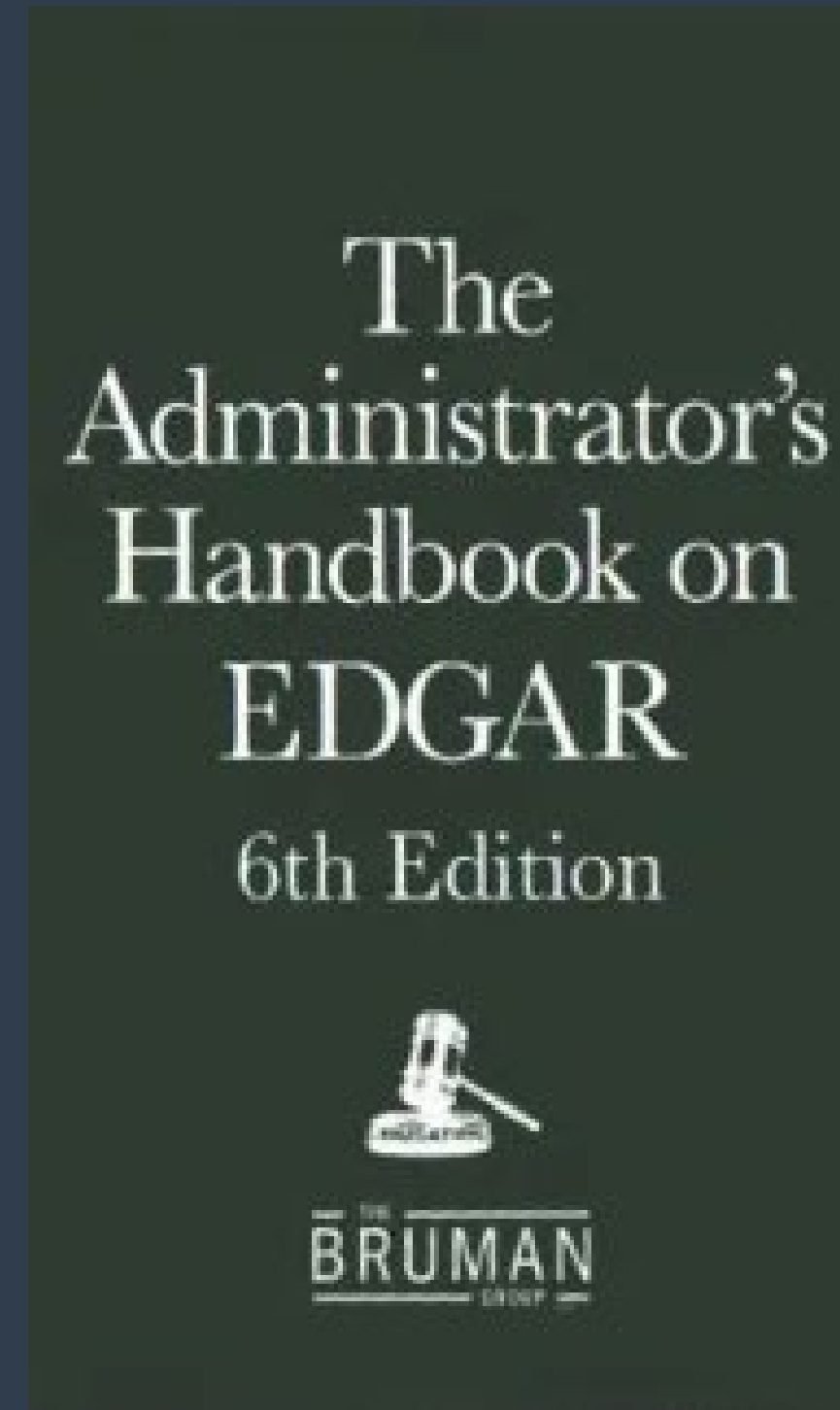
President Lyndon B. Johnson signing ESEA 1965.



President Barack Obama signing ESSA in December 2015.

Title I Coordinator Roles

- Title I Coordinators need to be up-to-date on the latest in education reform efforts and to understand curriculum and instruction.
- Title I Coordinators need to know the law, the regulations, and guidance related to Title I.
- Title I Coordinators also need to be familiar with EDGAR (Education Department General Administrative Regulations).



Title I Coordinator Roles- cont'd.

- Title I Coordinators have a **major responsibility** to see that the funds that flow to the districts are used for the educational purposes intended in the law.
- Title I Coordinators have a **major role** in overseeing that the funds which are spent are in compliance with applicable law, regulations, and guidance.
- Title I Coordinators need to be well-versed in both program and compliance.



“Fund your plan, rather than planning your funds”



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Key Components to Grant Implementation



PLANNING



EVALUATING



IMPROVING

Plan Development



Each LEA plan shall be developed in consultation with teachers, principals, administrators (include administrators of programs described in other parts of this title) and other appropriate school personnel, and with parents of children in schools served under this part. (*Section 1112*)

- What does this look like?
- The Title I Coordinator should meet with stakeholders to plan based on need (timely manner).
- Sign In, Agenda, and Meeting Minutes should correlate with information within GEMS.
- Needs Assessment should tie directly to activities within the GEMS plan.

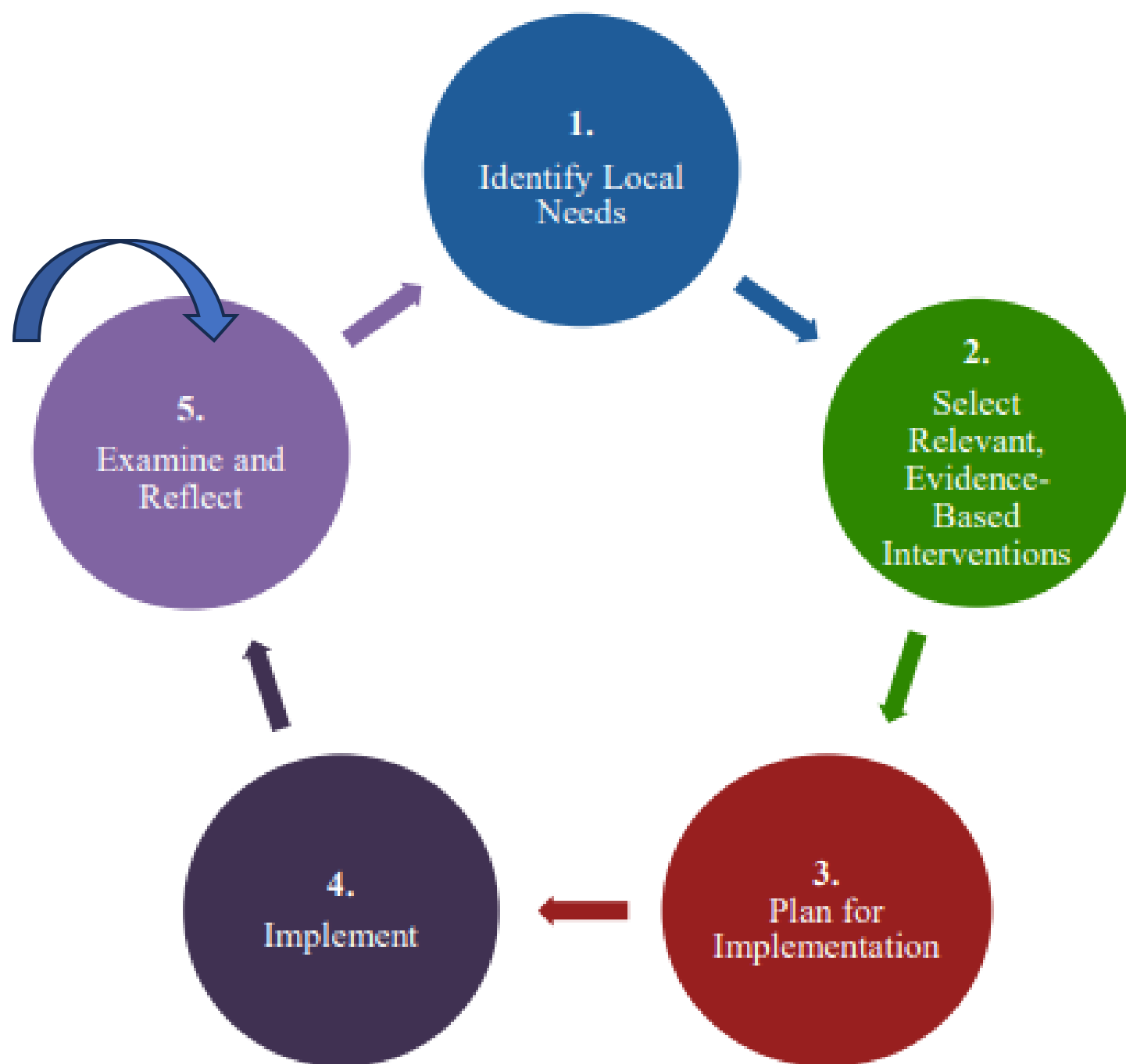
LEA Assurances

The LEA plan must ensure that it will:

- Ensure that migratory children and former migratory children are selected to receive Title I services on the same basis as other children.
- Provide equitable services to private school children.
- Coordinate and integrate Title I services with other educational services such as MLs, children with disabilities, migratory children, and homeless children and youth.
- Designate a point of contact with DSS. Establish procedures for transporting foster care students to the school of origin.
- Ensure that teachers and paraprofessionals working in Title I programs meet state certification and licensure requirements.



Program Evaluation Process



Strengthening **ESEA Investments**:

- Identify local needs
- Choose evidence-based interventions
- Plan and support implementation
- Monitor and reflect on results
- Set and evaluate goals throughout the year

Together, these steps drive continuous improvement and support better student outcomes.

Examine and Reflect

Monitor and Improve Your Activity

- **Track progress** using data and specific goals
- **Check implementation:** Is it going as planned?
- **Assess milestones:** Are key targets being met?
- **Adjust as needed** to improve results and impact



Use data to guide continuous improvement.

Examine and Reflect

Evaluate Effectiveness and Impact

- **Measure success:** Did the activity achieve its goals?
- **Assess impact:** Is it making a difference in the target areas?
- **Key questions to answer:**
 - Did the program work?
 - Are we reaching our desired outcomes?

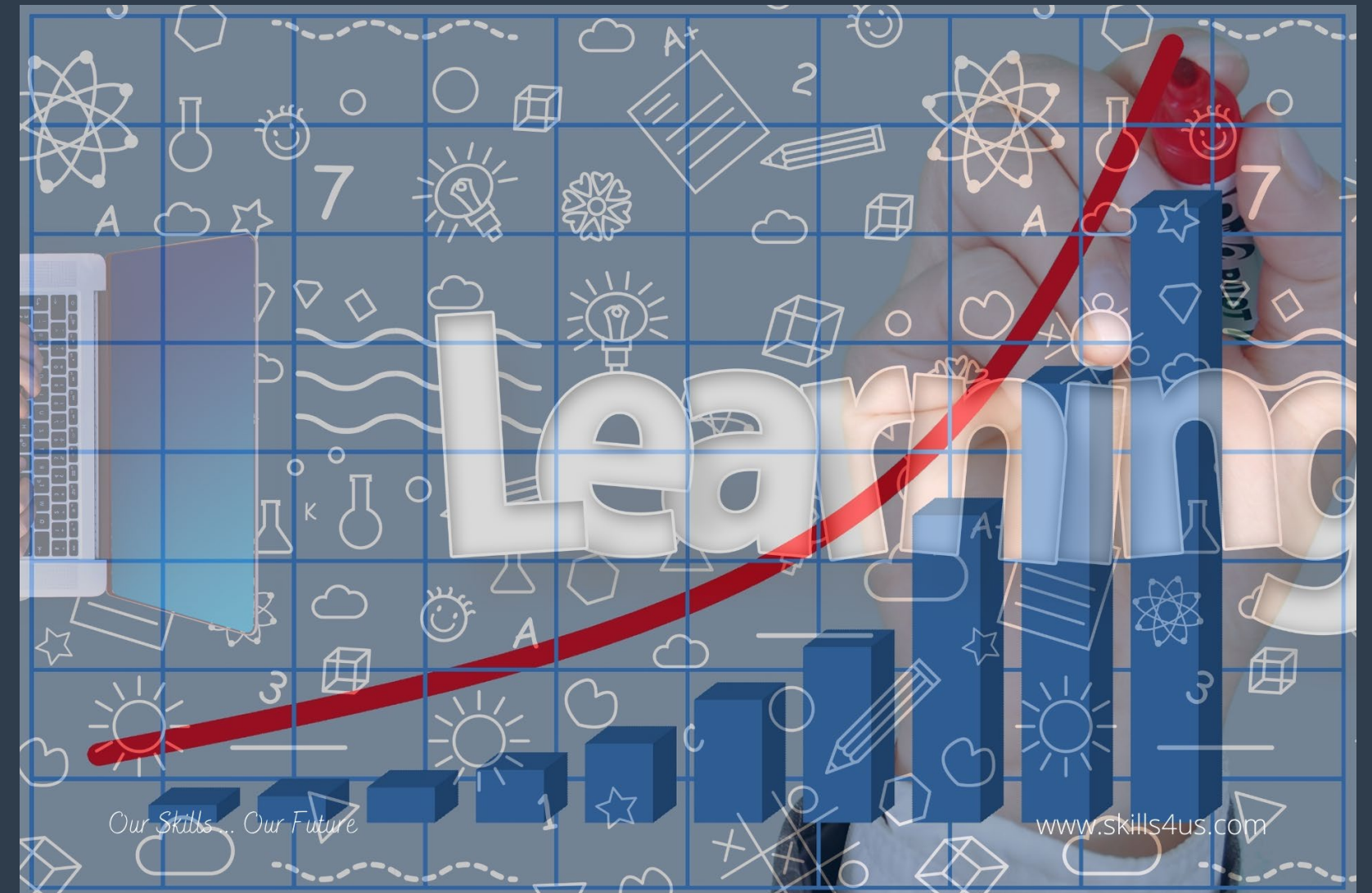
Use evaluations to confirm results and adjust if needed.



Examine and Reflect

Decision-Making for Future Investments

- **Use insights** from monitoring and evaluations to guide decisions
- Decide whether to:
 - Continue, modify, or scale the activity
 - Try a different approach if needed
- **Informed decisions** = Better strategies and improved outcomes
- **Adjust strategies to maximize long-term success.**



Key Questions for Evaluating Success

- What are reasonable expectations of success?
- How can success be measured (e.g., milestones, outcomes)?
- What are the progress and performance milestones to track?
- What have participants (students, educators) shared about their experience?
- How can insights from this intervention be shared and used in future decision-making?
- Did the program meet its goals?
- Should the intervention continue, be modified, or discontinued?

Use these questions to guide reflection and decision-making.

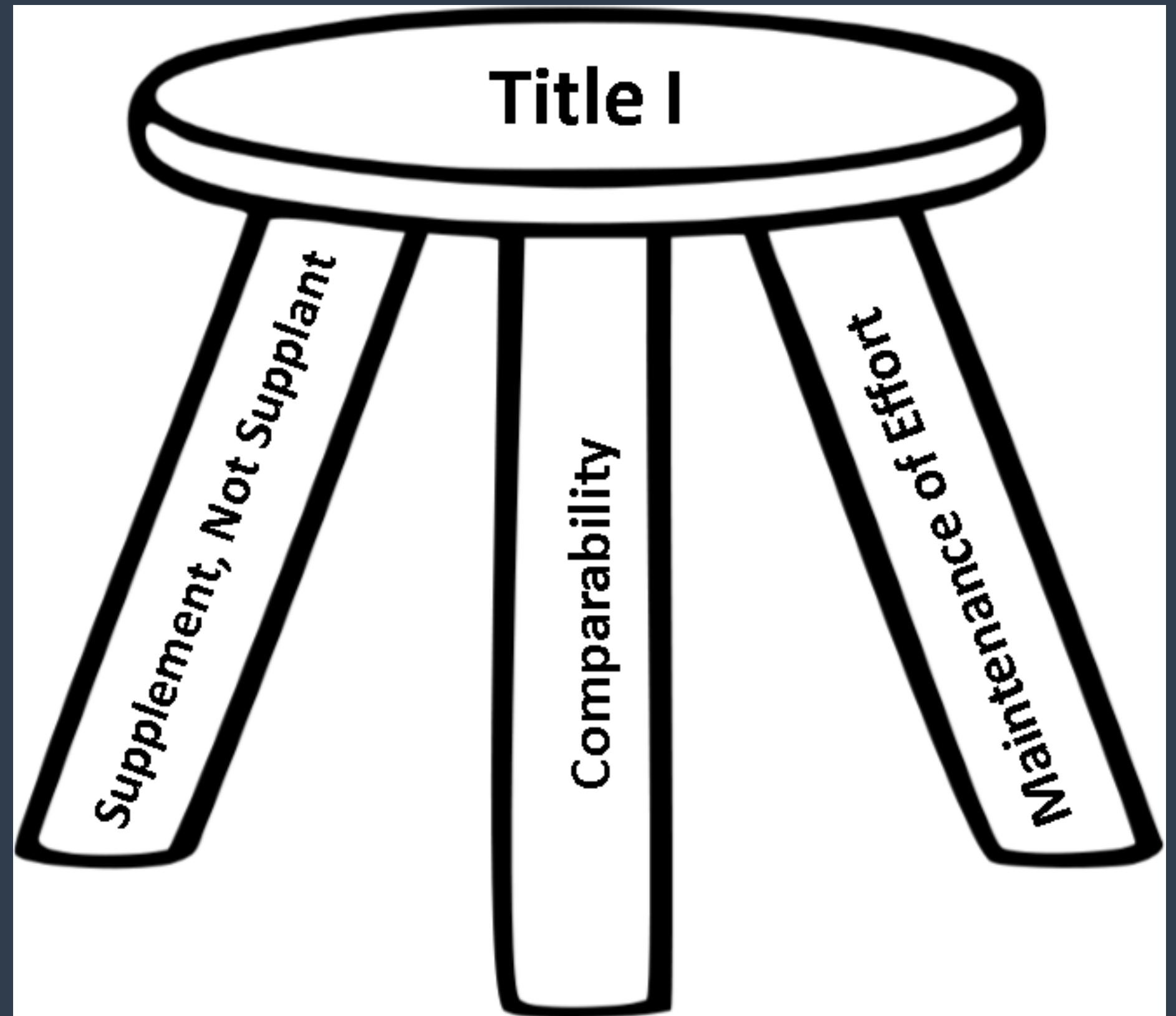


Fiscal Requirements

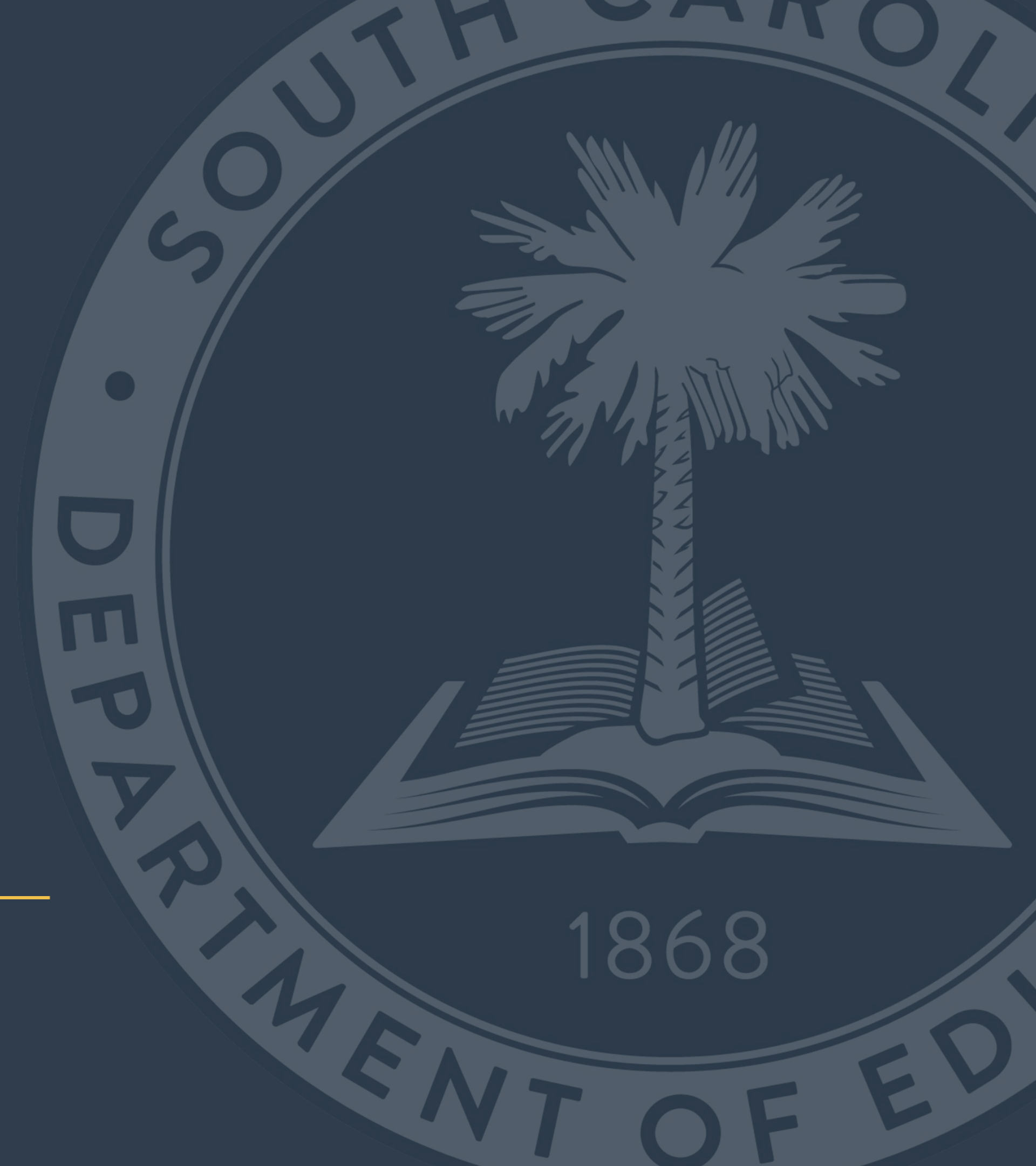
There are three major fiscal rules that reinforce the fundamental Title I requirement:

- Supplement Not Supplant (SNS)
- Comparability
- Maintenance of Effort (MOE)

These fiscal rules ensure that federal funds are used to provide extra services to children who are at greater risk of failing to reach state academic standards.



Maintenance of Effort



What is Maintenance of Effort?

Maintenance of Effort (MOE) is a federal requirement that requires grant recipients and/or sub-recipients to maintain a certain level of state/local fiscal effort to be eligible for full participation in federal grant funding.



In Other Words

- MOE is a test of equity.
- MOE requires LEAs to demonstrate that the level of state and local funding remains relatively constant from year to year.
- An LEA may receive Title I funds only if the LEA has maintained its fiscal effort.



Purpose

- Title I is *in addition (supplemental)* to the minimum education that all students receive.
- To ensure the sub-recipient of federal funds does not spend those funds in place of state and local dollars (supplanting)
- To ensure the sub-recipient spends their state and local funds for the same activities that would be provided if federal dollars were not available



“Meeting” MOE

- MOE is based on the two previous years
- Districts meet MOE for 2021-2022 if:
- 2020 state/local effort is at least 90% of 2019

For example:

MOE for 2019: \$ 7,305.50

MOE for 2020: \$7,246.03 (-\$59.47)

90% of \$7,305.50 = \$6,574.95

\$7,246.03 > \$6,574.95 so MOE has been met



What is Maintenance of Effort?

- Maintenance of Effort (MOE) is a federal requirement that requires grant recipients and/or sub-recipients to maintain a certain level of state/local fiscal effort to be eligible for full participation in federal grant funding.



Step 1:	
Preceding Year Audit Report Total Expenditures:	
(Refer to the audited Location Reconciliation Schedule)	\$ 15,200,000
Step 2:	
Items Subtracted From Total Expenditures in Step 1:	
(List page number for each data source from Audit Report.)	
Federal Expenditures (SEFA) <u>Page</u>	\$595,000
Capital Outlay (Attach Report)	\$170,000.00
Debt Service <u>Page</u>	\$73,500.00
Community Services <u>Page</u>	\$ 1,600.00
Pupil Activity Fund <u>Page</u>	\$ 45,000.00
Intergovernmental <u>Page</u>	\$ 9,800.00
Total Amount Excluded:	\$ (894,900.00)
Total Expenditures for MOE Calculation:	\$ 14,305,100.00
Step 3:	
135 ADM:	2,105
The per pupil MOE calculated for the preceding year from Audit Year <u>2020</u> :	\$ 6,795.77
Step 4:	
The per pupil MOE calculated for the second preceding year from Audit Year <u>2019</u> : (Attach Worksheet)	\$ 6,576.98
Met MOE Requirements? *	Met MOE

*Compare the per pupil MOE in Step 3 to the per pupil MOE of Step 4. The per pupil amount in Step 3 must be not less than ninety percent of the per pupil amount in step 4 to meet the MOE requirement.



MOE in GEMS

- GEMS Home
- Administer
- Search
- Reports
- Inbox
- Funding
- Grant Summary
- LEA Document Library
- Address Book
- SCDE Resources
- Help for Current Page
- Request Help
- GEMS Sign Out

Stanley, Jewell
Production

Session Timeout
00:59:53

Maintenance of Effort

2001 - Fairfield County School District (2001) Public District - FY 2019 - Title I Part A - Rev 0 - Title I Part A

Go To

Step 1:	Audit Source Page #	Amount
Preceding Year Audit Report Total Expenditures: (Refer to the audited Location Reconciliation Schedule)	* 67	* \$ 50,111,437.00
Step 2: Items Subtracted From Total Expenditures in Step 1:	Audit Source Page #	Amount
Federal Expenditures (SEFA) (Upload page to Related Documents)	* 72	* \$ 5,457,651.00
Capital Outlay (Upload report to Related Documents page)	NA	* \$ 3,222,812.00
Debt Service (Upload page to Related Documents)	* 63	* \$ 1,237,711.00
Community Services (Upload page to Related Documents)	* 13	* \$ 114,661.00
Pupil Activity Fund (Upload page to Related Documents)	* 65	* \$ 473,263.00
Intergovernmental (Upload page to Related Documents)	* 13	* \$ 626,397.00
Total Amount Excluded:		\$ 11,132,495.00
Total Expenditures for MOE Calculation:		\$ 38,978,942.00
Step 3:	Audit Year	Amount
135 ADM:(Upload to Related Documents)		* \$ 2,511.00
The per pupil MOE calculated for the preceding year from Audit Year	* 2016-2	\$ 15,523.27
Step 4:	Audit Year	Amount
The per pupil MOE calculated for the second preceding year from Audit Year	* 2015-2	\$ 14,645.94
Met MOE Requirements? +		Met MOE

+ Compare the per pupil MOE in step 3 to the per pupil MOE of step 4. The per pupil amount in step 3 must be not less than ninety percent of the per pupil amount in step 4 to meet the MOE requirement.



ESSA Reminders

An LEA may fail to meet the Maintenance of Effort (MOE) test once every five years without penalty.

- If an LEA fails to meet MOE in the current year **AND** has failed to meet it in the previous five years, a penalty will be assessed.
- The penalties have not changed.



Waiver Requests

The State has no authority to waive the MOE requirement. The U.S. Dept. Of Education may waive the requirement for the following:

- Waivers may now include “a change in the organizational structure of the LEA.” 20 USC 7901 (a)
- Exceptional or uncontrollable circumstances, such as natural disaster
- A precipitous and unforeseen decline in the financial resources of the State
- Waivers may now include “a change in the organizational structure of the LEA.”
20 USC 7901 (c)



Penalties

- The penalties for not meeting Maintenance of Effort remain the same.
- An LEA will receive a reduction in **all** federal program funding if it fails to meet the requirement and a waiver is not granted.

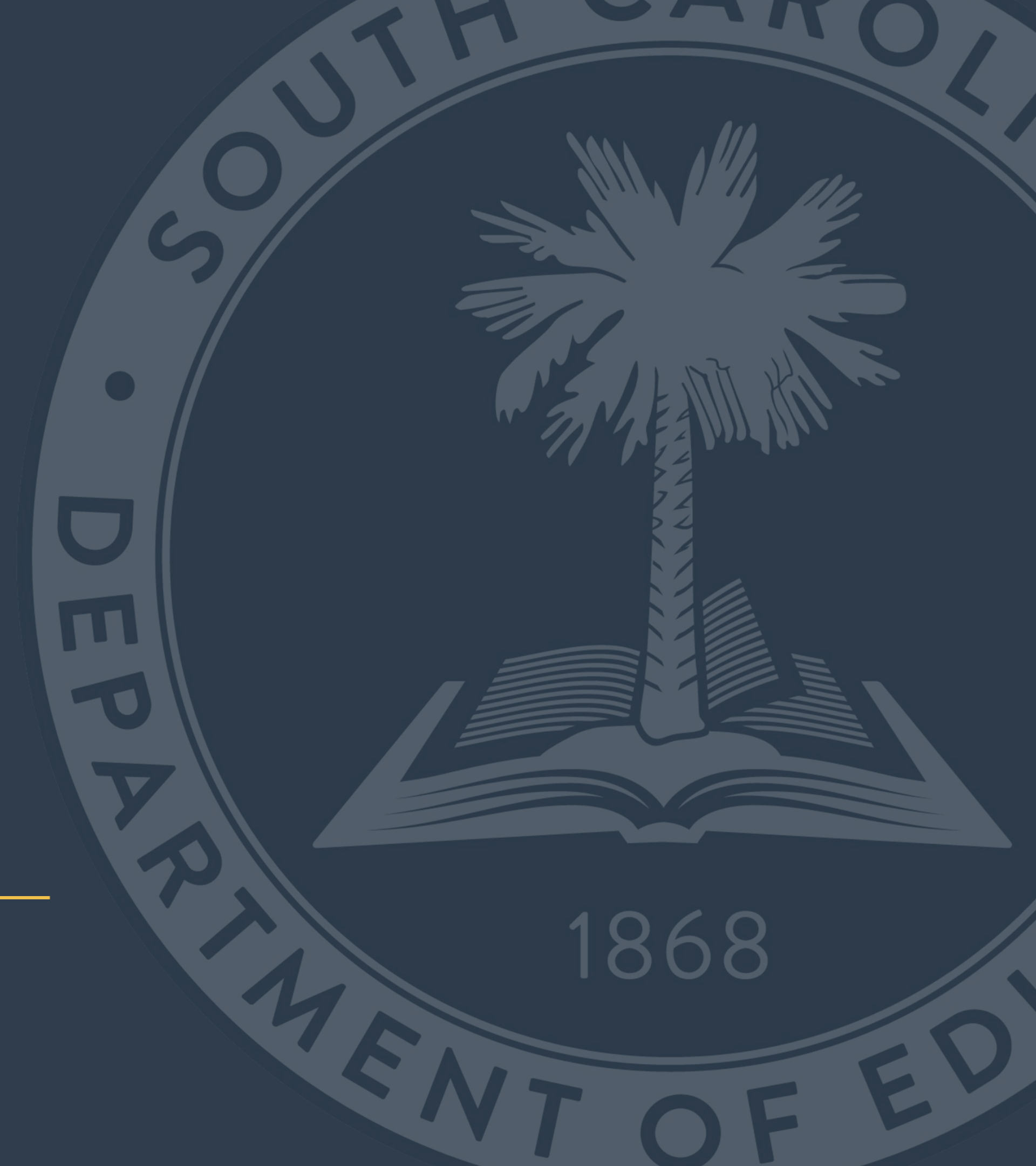


Tips and Friendly Advice

- Do not reinvent the wheel.
- Use and fully complete the form from the SCDE website...it works!
- Do not use “custom” forms.
- Keep everything consistent from year to year.
- Beware of large anomalous capital outlays.
- Work closely with your Finance Director.
- **Review in July and January to allow for adjustments.**
- Ask Questions



Comparability



Comparability Basics

What is comparability?

- A test of **Fairness** in staffing

Why do we calculate comparability?

- **Required** every year that the LEA receives Title I funding (ESSA, Section 1120A (c))

Important Dates:

- Complete review by November 15
- LEA must be comparable by January 15



Exemptions (Possibly)



One school per grade span



One large school and one small school

Comparability Timeline

January- April



Proactively engage in district-level budget (State and local funds) discussions concerning staff assignments, equipment, and material for the purpose of ensuring compliance with Title IA comparability requirements.

May- July



Conduct an introductory meeting with Human Resources and LEA Finance representative to discuss the requirements for the completion of the upcoming Comparability Report.



Establish participant roles and responsibilities



Establish LEA-specific timelines for the completion of the report.

August



Obtain a copy of the preliminary district-wide school staffing report from Human Resources.



Compare the list of Title IA-funded staff as reflected on the School Allocation page to the Title IA-funded staff as reported by Human Resources.



Comparability Timeline (Continued)

September

It is a recommendation and best practice to gather the data needed to complete calculations (student and staff assignments data) and run a preliminary report.

Run comparability using the Comparability Worksheet found on the SCDE website.

Make comparability corrections immediately for all schools that are shown to be non-comparable.

October

An LEA should collect the necessary data to demonstrate comparability as of the October full-time equivalent (FTE) count day.

November

Title IA Comparability Report is submitted annually to the Consolidated Oversight and Monitoring Team.

December-January

If all schools in an LEA are not comparable by the October FTE count day, the LEA will file a revised comparability report with the SCDE demonstrating that, as of a date determined by SCDE, comparability has been met.



Federal Criteria

There are eight comparability tests. The SEA determines the test it will use.

South Carolina uses **student : teacher ratio**.

Required data include:

- District-wide salary schedule
- District policy to ensure equivalence of staff
- District policy to ensure equivalence in materials and supplies



Eligible Employees for Counting Purposes

- **Instructional staff members to be included:**

When an LEA measures compliance by comparing student/staff ratios, the LEA should **consistently** include the same categories of staff members in the ratios for both Title IA and non-Title IA schools.

- (Instructional staff may include teachers and other personnel assigned to schools who provide direct instructional services, including music, art, and physical education teachers; guidance counselors; speech therapists; and media specialists, as well as other personnel who provide services that support instruction, such as school social workers and psychologists.)



Eligible Employees for Counting Purposes

Calculating Comparability

LEAs should only include staff paid with State and local funds.

- **Exclude** staff paid with private or federal funds.
- **Exclude** principals, assistant principals, custodians, cafeteria personnel, school nurses, security personnel, pre-kindergarten teachers, pre-kindergarten paraprofessionals, secretaries, and non-instructional paraprofessionals.

Authorized Activities

- Include activities that are authorized by Title VII of ESEA, the Impact Aid Program. Impact Aid is considered general aid to recipient LEAs; these funds may be used for an educational activity consistent with local and State requirements.
- Impact Aid funds are effectively deemed State and local funds for which no accountability to the federal government is required, and staff that is paid with Impact Aid funds is included in comparability determination.



Comparability Procedure

- Must count students and teachers **ON SAME DAY!**
- Compare Title I schools by grade spans served.
- Compare non-Title I to Title I schools, *or* if all Title I schools, compare schools with the highest poverty rates to those with the lowest poverty rates.
- Count students using the district's Membership Count.
- Count **allowed** staff using the best possible system (ex. personnel or finance).
- **Do not** count 3- or 4-year-olds.
- **Source data** must be **verifiable** by an auditor.
- Social security numbers and salaries are **not** needed.
- A K-8 school can be counted as one K-5 and one 6-8 school.



Comparability Calculation Example

School	Grade Span	Student Enrollment	FTE Instructional Staff	Student/ Instructional Staff Ratio	Comparable?
Title I Elementary Schools					
Beaufort Elementary	KG - 5	528	70.2	7.5	Yes
Broad River Elementary	KG - 5	510	49.4	10.3	Yes
Davis Elementary	KG - 5	417	38.7	10.8	Yes
Shanklin Elementary	KG - 5	726	59	12.3	Yes
Port Royal Elementary	KG - 5	189	16	11.8	Yes
St. Helena Elementary	KG - 5	808	56	14.4	No
Shell Point Elementary	KG - 5	673	60	11.2	Yes
Non-Title I Elementary Schools					
Hilton Head	KG - 5	1,764	114.5	15.4	
Lady's Island	KG - 5	757	70.0	10.8	
MC Riley	KG - 5	1,005	88.0	11.4	
Mossy Oaks	KG - 5	484	42.0	11.5	
Total		4,010	314.5	12.8	
110% of Student/FTE ratio for non-Title I schools *					14.08



Not Comparable?

If student : teacher ratio does not work, try to:

- Adjust funding source
- Use another method (contact SCDE first)
- Move personnel



Required Reading

Non-Regulatory Guidance

Title I Fiscal Issues:

Maintenance of Effort

Comparability

Supplement, Not Supplant



<https://www.ed.gov/sites/ed/files/2020/07/fiscalguid.pdf>

<https://www.ed.gov/sites/ed/files/2024/01/essaguidance160477-1.pdf>

Questions



Supplement, Not Supplant



ESSA SNS – Title I

- Districts developed a methodology beginning in 2018-2019 SY for demonstrating that Title I funded schools receive their fair share of state and local dollars (which the SCDE monitors).
- The SEA must look at school budgets, staffing formulas, weighted per pupil distribution funds for instruction, MOE, comparability, and other factors affecting equity.
- The bottom line is to look at state/local funding of schools, in the absence of federal funding, and determine if the schools are receiving funding or resources equitability.

The image shows a chalkboard with handwritten mathematical derivations. On the left, a graph of a curve $y = g(x)$ is shown with a point x and a secant line labeled "Secant Lines". A tangent line is also shown, labeled "Tangent Line". The point $x+h$ is marked on the x-axis. The main part of the board shows the limit process for finding the derivative of $f(x) = x^2$:

$$f'(x) = \lim_{h \rightarrow 0} \frac{f(x+h) - f(x)}{h}$$
$$f(x) = \lim_{h \rightarrow 0} \frac{(x+h)^2 - x^2}{h}$$
$$= \lim_{h \rightarrow 0} \frac{x^2 + 2xh + h^2 - x^2}{h}$$
$$= \lim_{h \rightarrow 0} \frac{2xh + h^2}{h}$$
$$= \lim_{h \rightarrow 0} h(2x + h)$$

Exemptions (Possibly)



One school per grade span



One large school and one small school

Supplement Not Supplant Methodology

PPA

Richland School District Two

ESSA Title I Part A Supplement, Not Supplant Methodology

The Every Student Succeeds Act (ESSA) requires Local Education Agencies (LEAS) to demonstrate that their methodology complies with Section 1118 of ESSA describing a neutral methodology of distributing state and local funds to schools in the District.

The district gives a discretionary budget to each school or stand-alone center. Below are the allocation formulas.

Discretionary Per Pupil Allocation (PPA)

Elementary Schools

PPA

PY 135 ADM	\$85
PY 135 Pupils in Poverty	\$35
PY 135 ADM	\$17 (Supply Allocation)
PY 135 ADM	\$1 (Health Room Allocation)

Middle Schools

PPA

PY 135 ADM	\$90
PY 135 Pupils in Poverty	\$35
PY 135 ADM	\$17 (Supply Allocation)
PY 135 ADM	\$1 (Health Room Allocation)

High Schools

PPA

PY 135 ADM	\$105
PY 135 Pupils in Poverty	\$35
PY 135 ADM	\$17 (Supply Allocation)
PY 135 ADM	\$1 (Health Room Allocation)
PY 135 CTE ADM	\$51
Flat Amount	\$2,930 (Advanced Placement)



Supplement Not Supplant Methodology

At Risk PPA

Richland School District Two

ESSA Title I Part A Supplement, Not Supplant Methodology

General fund allocations are also made specifically to address the needs of students at risk of school failure. Funding is allocated as follows:

<u>At Risk Per Pupil Allocation</u>		
Elementary Schools		
PY 135 Pupils in Poverty	\$165	
Middle Schools		
PY 135 Pupils in Poverty	\$125	
High Schools		
PY 135 Pupils in Poverty	\$90	



Supplement Not Supplant Methodology

Staffing Standards

Richland School District Two

ESSA Title I Part A Supplement, Not Supplant Methodology

Staffing Standards

Richland School District Two								
School Staffing Standards								
Elementary			Middle			High		
Position	Membership	FTE/Ratio	Position	Membership	FTE/Ratio	Position	Membership	FTE/Ratio
Principal	Any	1.0	Principal	Any	1.0	Principal	Any	1.0
Assistant Principal	≥ 350	1.0	Assistant Principal	≥ 500	2.0	Assistant Principal	< 750	2.0
	≥ 600	2.0		≥ 800	2.0		≥ 1000	3.0
Media Specialist	< 250	0.5	Media Specialist	< 250	0.5		≥ 2000	4.0
	≥ 250	1.0		≥ 250	1.0	Assistant Administrator	< 750	2.0
Guidance Counselor	> 350	0.5	Guidance Counselor &		300:1		≥ 1000	3.0
	≥ 350	1.0	Career Specialists				≥ 1400	4.0
	≥ 750	1.5					≥ 1700	5.0
	≥ 1000	2.0					≥ 2100	6.0
	≥ 1250	2.5				Media Specialist	≥ 400	1.0
							≥ 1000	2.0
						Guidance Counselor &		300:1
						Career Specialists		Min 1 per GL
Teachers			Teachers			Teachers		
GR 1-5		22:1	GR 6 ELA/Math		20:1	Academic Classes		20:1
GR 1-3 Reading/Math		22:1	GR 6 Other Subjects		20:1	Music & PE		40:1
GR 1-3 Other Subjects		22:1	GR 7-8		20:1	Health		35:1
GR 4-5 Lang Arts/Math		22:1	PE & Music		35:1	Athletic Director	Any	1.0
GR 4-5 Other Subjects		22:1	Health		40:1	Magnet		
Pre Kindergarten		20:1	Technology Specialist	< 500	0.5	Schoolwide		1.0
Kindergarten		22:1		≥ 500	1.0	School within a school		2.0
Art	> 350	0.5	Academic Effectiveness	Any	0.5	ROTC		2.0
	≥ 350	1.0	AVID	Any	0.5	Technology Specialist	Any	1.0
	> 750	1.5	Magnet					
	≥ 1000	2.0	Schoolwide		1.0	Career Prep		3.0
	≥ 1250	2.5	School within a school		2.0	Extra Curricular Tutorial		0.25
						Arts Magnet PCA		2
Music		Max class size 40				HS Initiatives		
Physical Education		Max class size 28	Orchestra	< 500	0.5	Orchestra	< 500	0.5
Technology Specialist	< 350	0.5		≥ 500	1.0		≥ 500	1.0
	≥ 350	1.0	Band	Any	1.0	Band	Any	1.0
Nurse	< 350	0.5	Nurse	Any	1	Nurse	Any	1
	≥ 350	1.0	Psychologist	< 500	0.5	Psychologist	< 500	0.5
Psychologist	Any	0.5		≥ 500	1.0		≥ 500	1.0
Classified Staff			Classified Staff			Classified Staff		
Administrative Assistant	Any	1.0	Administrative Assistant	Any	1.0	Administrative Assistant	Any	1.0
Student Data Coordinator	Any	1.0	Student Data Coordinator	Any	1.0	Student Data Coordinator	Any	1.0
Attendance Secretary	Any	1.0	Secretary II (185 day)	> 750	1.0	Secretary II (215 day)	Any	3.0
Secretary II	> 750	1.0		> 1000	2.0	Secretary II (185 day)	> 1650	2.0
Health Room Aide	Any	1.0	Secretary II Guidance (240 day)	Any	1.0	Secretary II Guidance (240 day)	Any	1.0
Media Aide	Any	1.0	Bookkeeper	Any	1.0	Bookkeeper	Any	1.0
GR 1-5 Instruc. Aides	< 600	2.0	Media Aide	Any	1.0	Media Aide	Any	1.0
	600-749	3.0	Health Room Aide	Any	1.0	Health Room Aide	Any	1.0
	750-899	4.0	Instructional Aides	< 850	2.0	Clerical - Fees	Any	1.0
	900-1050	5.0		850 - 1099	3.0	Instructional Aides	< 1400	4.0
	> 1050	6.0		1100-1349	4.0		1400-1699	5.0
Kindergarten Aides	Any	1 per classroom		1350-1600	5.0		1700-1799	6.0
							1800-2000	7.0
						Maintenance Worker	Any	1.0



Related Documents

- SCDE may request that LEAs attach additional documentation to funding application
- SCDE can provide document template
- Documents may be required or optional
- Clicked links will open in new browser window

Related Documents

0701 - Beaufort County School District (0701) Public District - FY 2019 - Title V - Rev 0 - Title V

Go To

Optional Documents		
Type	Document Template	Document/Link
Additional Documentation	N/A	Upload New



What must be included in a LEA Title I Plan?

Under Section 1112 of ESEA, the district plan must describe:
How the LEA will identify and address disparities that result in low-income and minority students being taught by ineffective, out-of-field, inexperienced teachers.

- Poverty criteria the LEA will use to select served schools
- The services to be provided to homeless children and youth
- Strategies for parent and family engagement
- How the LEA will support, coordinate, and integrate Title I services for preschool students with other early childhood programs (if applicable)



Title I, Part A – Equitable Services



Equitable Services – Title I, Part A

Equitable Education Opportunity for All Children

Goal

- Provide all children a fair, equitable, high-quality education
- Close educational achievement gaps

ESEA Section 1117 Requirements

- LEAs must consult with private school officials
- Provide eligible private non-profit school children, their teachers, and families with:
 - -Title I services or benefits
 - -Equitable to those provided in public school
- *Eligible Private School Children*
 - Reside in a Title I public school attendance area
 - Are low achieving



Equitable Services – Title I, Part A Eligibility

To be eligible for services, a child must:

- Reside in a participating Title I public school attendance area and
- Be identified by the LEA as low achieving based on multiple, educationally related, objective criteria.

A child may be identified as eligible solely by their status as follows:

- Homeless children;
- Children who in the preceding two years had participated in Head Start, a literacy program under Title II, Part B, Subpart 2, a Title I preschool program, or a Title I, Part C (Migrant Education) program; and
- Children in a local institution for neglected or delinquent children and youth or attending a community day program.

Identifying Low-Income Students

- **To be eligible for services, a child must:**
 - Reside in a participating Title I public school attendance area and
 - Be identified by the LEA as low achieving based on multiple, educationally related, objective criteria.
- **A child may be identified as eligible solely by their status as follows:**
 - Homeless children;
 - Children who in the preceding two years had participated in Head Start, a literacy program under Title II, Part B, Subpart 2, a Title I preschool program, or a Title I, Part C (Migrant Education) program; and
 - Children in a local institution for neglected or delinquent children and youth or attending a community day program.

Remember: Poverty is not a criterion for services.



LEA Responsibilities

- List all available services
- Important – Set specific deadlines
- Ensure all services are secular, neutral, and non-ideological
- Ensure services go to low-achieving students at participating schools
- Maintain control of ALL funds, materials, equipment, and property purchased
- Maintain ongoing communication with the private schools
- Identify and reach out to all private schools inside and outside of the geographic boundaries
- Verify the physical location of the school
- Invitations sent to attend the meeting
- Invitations should have indicators to ask for “Acceptance” or “Decline”



Consultation

- Timely and Meaningful
- How the needs of the children and educators will be identified
- What services will be offered
- How, where, and by whom the services will be provided
- How the services will be assessed and how the results of the assessment will be used to improve those services
- The size and scope of the equitable services to be provided to eligible private school children and educators, the amount of funds available for those services, and how that amount is determined



Consultation, continued

- How and when the agency, consortium, or entity will make decisions about the delivery of services, including a thorough consideration and analysis of the views of the private school officials on the provision of contract services through potential third-party providers
- Whether the LEA will provide services directly or through a separate government agency, consortium, or entity or through a third-party contractor
- Whether to provide equitable services to eligible private school children and educators
 - (1) by creating a pool or pools of funds with all the funds allocated under a program or
 - (2) on a school-by-school basis based on the equitable share of funds available to provide services in each



Terms/Timelines of Grants



- Discussed during initial consultation
- Private Schools CAN use the funds past 1 year
- Allowed to use the entire time of the grant
- Private Schools can deny the funds after they receive their allocation
- Must be offered to all the remaining participating Private Schools first
- If they accept, recalculation must be completed
- If they deny additional funds, LEA may use them in Public Schools
- NOTE: Must be communicated during the consultation

Documents Requirement (NEW)

- All Private School documentation – Related Document section GEMS
- Document to include:
 - Invitations with established deadlines for all private schools within the geographical boundaries and outside of your geographical boundaries (Meeting attendance)
 - Letters of Intent with established deadline (original mailing and returned responses)
 - Certified Mailing receipts with USPS stamp or receipt, returned mail, or any email communications (additional contact proof for no response received or any decline of funding).



Resources

- Intent to Participate Letter
- Needs Assessment for Equitable Services
- Private School to Parent Letter and Family Income Letter
- Evaluation of Equitable Services
- Complaint Process Forms
- Affirmation of Consultation for Title I, Part A
 - **(Must be completed and submitted to SCDE for Participating Private Schools Only)**
- Private Schools in South Carolina - South Carolina Department of Education

United States Department of Education (USDE)

Title-I-ES-guidance-revised-5-2023.pdf





Contact Information

Theresa Gregory

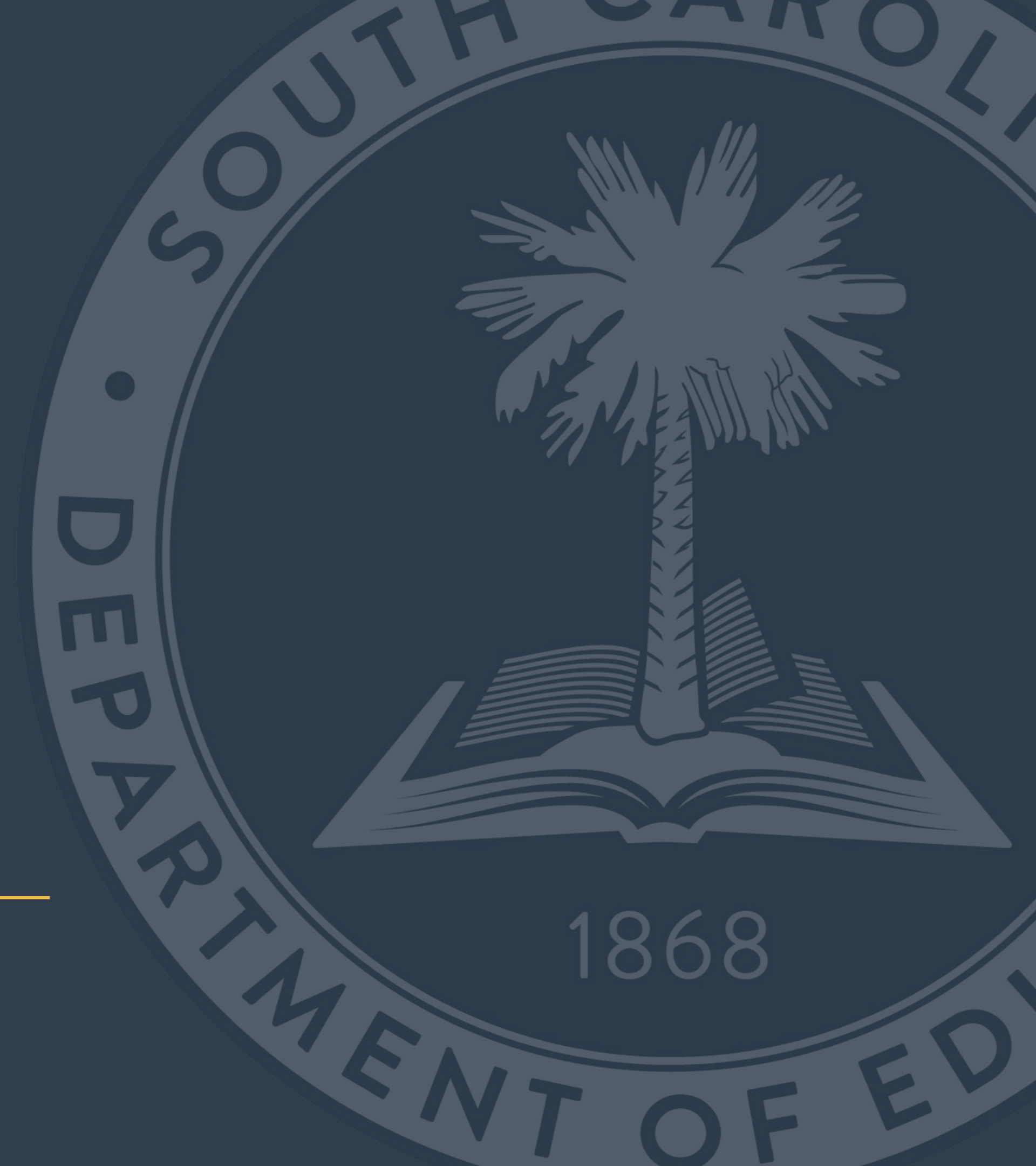
Email: tgregory@ed.sc.gov
Phone Number: (803) 734-3749

Equitable Services

Email: equitableServices@ed.sc.gov



LEA Set Asides



District Set-Asides

Definition: Reservations for district-wide activities that are taken from the current year Title I allocation prior to distributing funds to schools.



Required Set-Asides:

- **Parent and Family Engagement** - One percent (1%) of the current year allocation must be reserved (if current allocation is \$500,000 or more).
 - Ninety (90) percent of the 1% for Parent Involvement **must** be allocated to Title I schools. *Note: If served from the LEA, the GEMS narrative must clearly describe how schools are receiving their fair share of parenting funds. Coordinators are encouraged to push the funds down into the schoolwide plans.*
- **Homeless** - District **must** set aside funds for homeless.



LEA Funding for Parent and Family Engagement

Set Aside Item

Parent and Family Engagement (minimum of 1% of your Public Share allocation if your Title I, Part A allocation is at least \$500,000). 90% of funds must be distributed to schools.

For LEAs receiving at least \$500,000 in Title I allocations:

\$ 1,021,550.40 - your Title I, Part A original public share amount

\$ 10,215.50 - 1% of your Title I, Part A original public share amount - (Total Contributed from Schools + District Set Aside) must meet this minimum

\$ 9,193.95 - 90% of the above number (this amount must be distributed to your schools for parent and family engagement activities)

\$ 14,550.00 - Total Contributed from Schools (from Budget Code 188)

\$ 14,550.00 - Total Parent and Family Engagement (Total Contributed from Schools + District Set Aside)



What if my Title I allocation is less than \$500,000?



You **ARE NOT** required to reserve 1% of your allocation



You **ARE** required to follow the expectations of ESEA Section 1116.

Equitable Services & Parent & Family Engagement Activities

Participating Schools						
School	# Low Income Private School Students (from Title I Attendance Areas)	Total Allocation for this Private School	Parent and Family Engagement	Indirect Cost (Maximum allowed)	Indirect Cost Taken	Amount Available for Services to Students and Professional Development
Our Lady of Peace School	20.00	\$ 18,355.93	\$ 183.56	\$ 519.05	\$ 415.45	\$ 17,756.92
Totals:	20.00	\$ 18,355.93	\$ 183.56	\$ 519.05	\$ 415.45	\$ 17,756.92

\$ 10,338,059.78 Original Allocation	\$ 917.80 Average PPA for Public and Private	2.91 % Indirect Cost Rate
--------------------------------------	--	---------------------------

- LEA's must reserve at least 1% of the private school proportional share to carry out parent and family engagement activities.
- An LEA must ensure that teachers, parents, and families participate, on an equitable basis, in services and activities for parents and families.
- Activities of private school participants must be planned and implemented after meaningful consultation with private school officials and parents and families.



LEA Requirements according to ESEA 1116

- Activities and strategies should be consistent with the LEA's Parent and Family Engagement policy.
- LEAs must ensure that activities and strategies include at least one of the following:

Supporting PFE PD for LEAs and Schools

Supporting programs that reach parents at home, in the community and in schools

Disseminating information on best practices focused on Parent and Family Engagement

Collaborating or providing allocations to schools to collaborate with community based organizations that have a record of success of increasing parent and family engagement



Additional Information on Title I Parent and Family Engagement Requirements

Contact Information

- SC Parent and Family School Requirements
- Title I, Parent & Family Engagement Non-regulatory Guidance

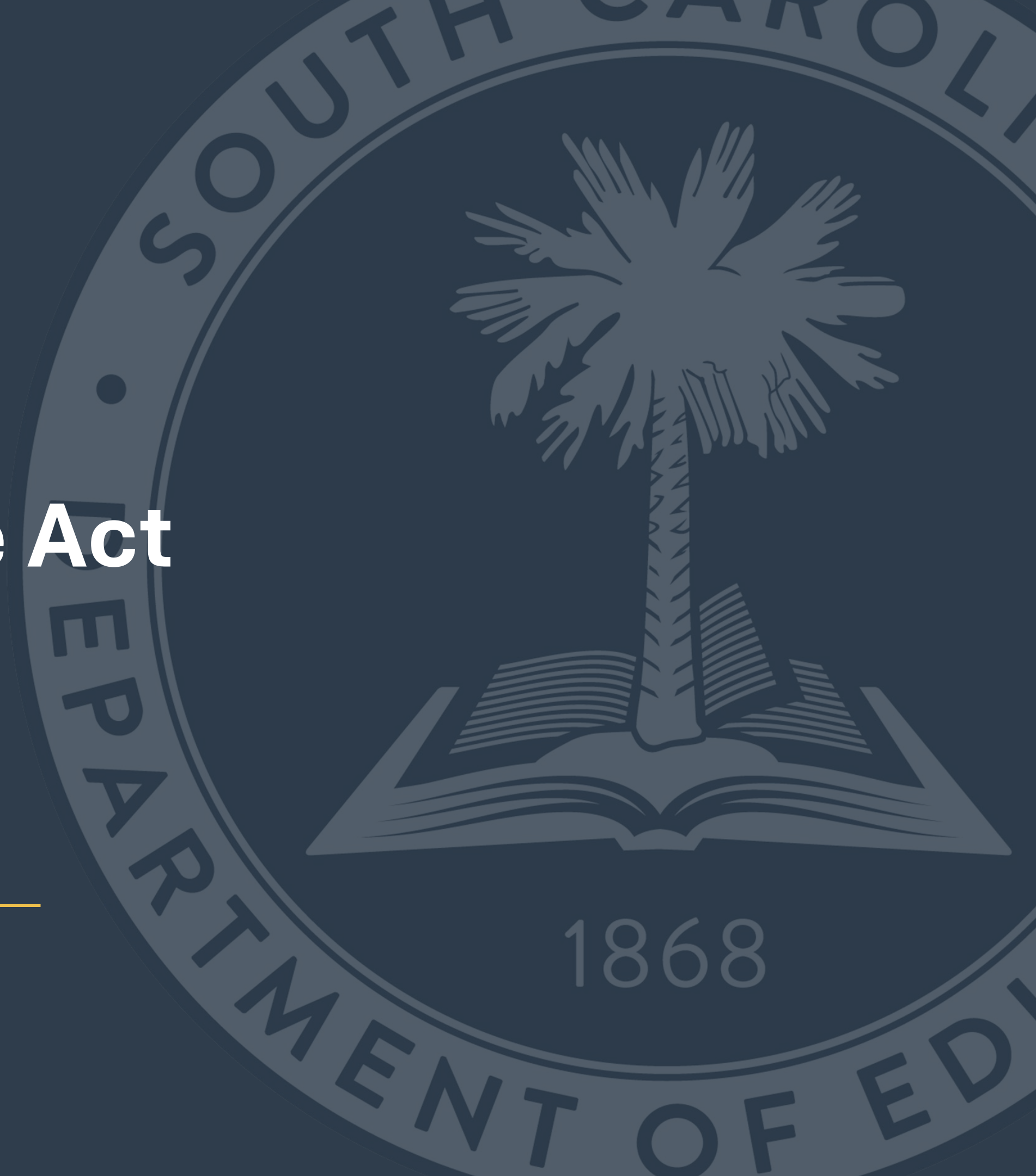
Leslie Bloss

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McKinney-Vento Homeless Assistance Act



McKinney-Vento Homeless Assistance Act

Individuals who lack a fixed, regular, and adequate nighttime residence



Definition of McKinney-Vento

- Includes sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason;
- Motels, hotels, trailer parks, or camping grounds due to the lack of alternative adequate accommodations; are living in emergency or transitional shelters; or are abandoned in hospitals
- Living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations
- Migratory children who qualify due to the above circumstances
- A family experiencing domestic violence, or other types of violence would be included in this definition.

South Carolina McKinney-Vento Identification

School Year	Number of MV Students	Percent Identified
2020-2021	11,986	1.6%
2021-2022	11,543	1.5%
2022-2023	13,770	1.8%
2023-2024	16,082	2.03%

**We are
increasing
our
Identification!**

Data: US Dept of Education


*In School Year 2024-25 we could see another increase
of ~2000 just due to Helene



Expectations for Title I, Part A Homeless Set-Aside:

- Allowable
- Sufficient
- Sustainable



Sufficiency is Key

LEAs must reserve a sufficient amount for Homeless Set-Aside

How do LEAs determine “sufficiency”?

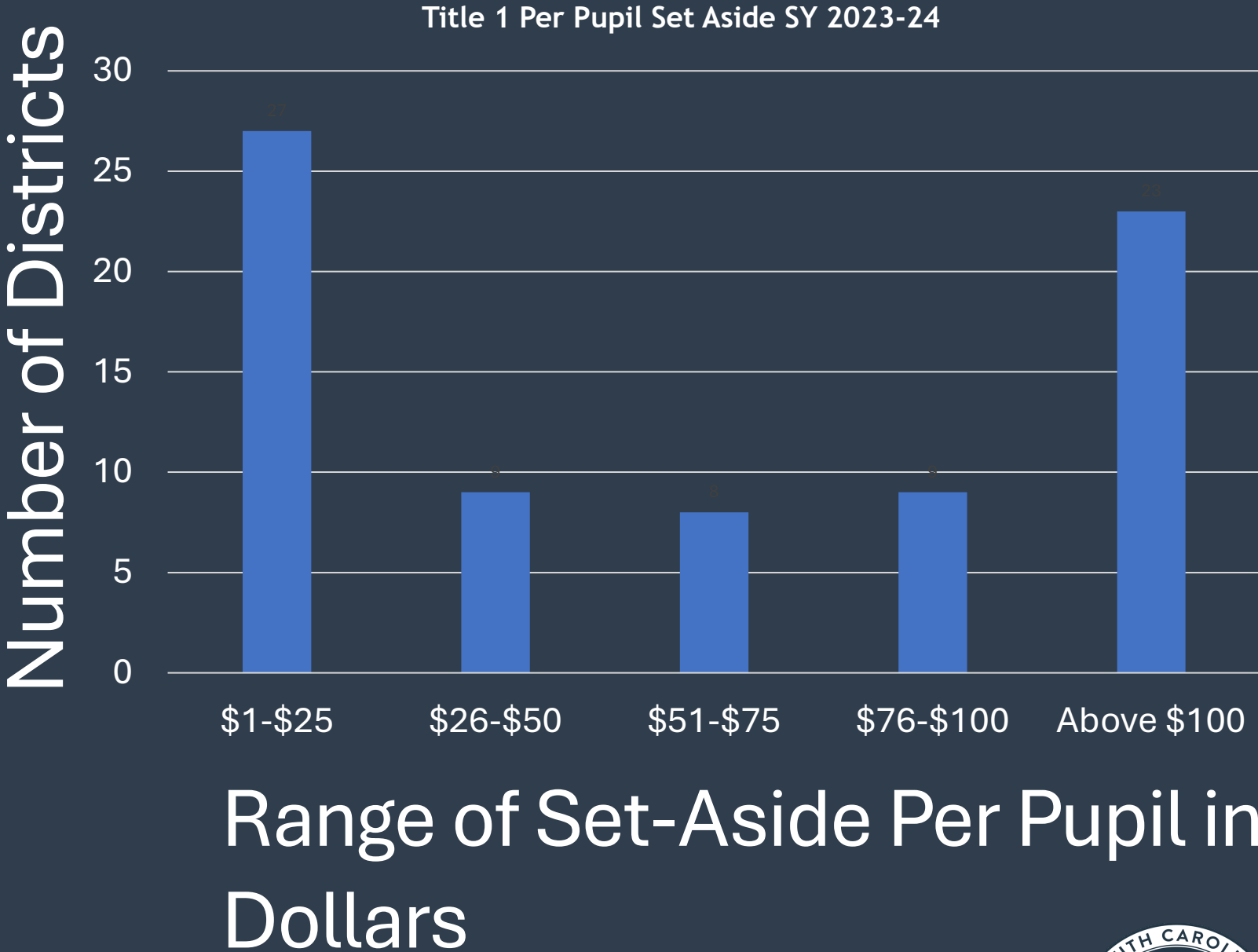
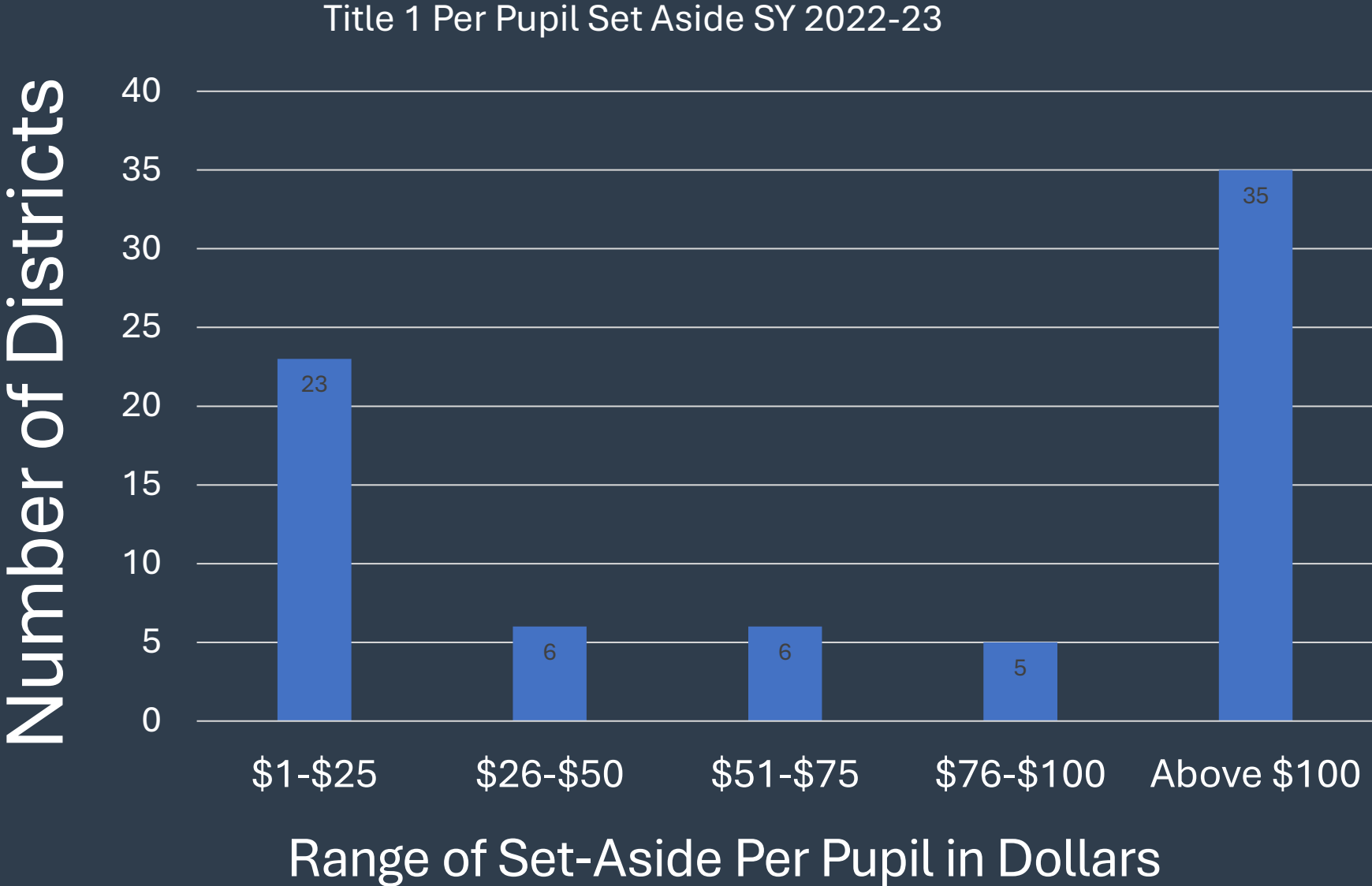
- Consider other funding streams connected to students experiencing homeless (e.g., EHCY, ESEA, State/Local funds)
- MV LEA Needs Assessment, enrollment data, program effectiveness, and cost data on expenditures
- Mandated Collaboration between Title I and MV Liaison (42 U.S.C. § 11432)

Must include plan/justification in GEMS Set-Aside Narrative

- SCDE Title I/MV teams will collaborate to verify sufficiency as needed



LEA Per MV Pupil Amount SY 2022-2023 and 2023-2024



TIPAH: SCDE Resource



Title I, Part A Homeless Set-Aside (TIPAH)

This document will assist Local Educational Agencies (LEAs) with clarification on how to strategically address the concerns of their students' experiencing homelessness through TIPAH.

Two principles govern the use of Title I, Part A funds to provide such services to homeless students:

- ✓ The services must be reasonable and necessary to assist homeless students to take advantage of educational opportunities. (ESEA section 1113(c)(3)(A); 2 CFR § 200.403(a))
- ✓ Title I, Part A funds must be used only as a last resort when funds or services are not available from other public or private sources.

Critical Assistance for Students Experiencing Homelessness

Students experiencing homelessness are part of Title I, Part A target population of disadvantaged students. However, the high mobility, compounding stress, and poverty associated with homelessness create unique educational barriers and challenges that Title I, Part A students with fixed, regular, and adequate housing may not face. Homelessness can be associated with lower standardized test scores in reading, spelling, and math. Students experiencing homelessness also change schools more frequently, which requires them to adapt to new curricula, teachers, and peers, while coping with the increased loss of social connections, all of which negatively impact a student's learning. Thus, students in homeless situations require support beyond what typically may be offered to other students to increase their academic achievement. For these reasons, children and youth experiencing homelessness are automatically eligible for Title I, Part A services, whether or not they attend a Title I, Part A school, or meet the academic standards required of other students for eligibility (20 U.S.C. § 6315(c)(2)(E)). Additionally, automatic Title I, Part A eligibility allows students in homeless situations who are doing well academically to receive additional non-instructional education-related support services needed to succeed in school.

Summary of TIPAH

- ✓ Aids students at a time of uncertainty
- ✓ Increases academic achievement
- ✓ Provides student specific support
- ✓ The total amount of set-aside is LEA specific based on resources, data and student needs



Homeless Set-aside Reminders

- Above and beyond what is already provided to students experiencing homelessness under Title I, Part A.
- An LEA should not reserve the same amount of Title I, Part A funds over multiple years when the student count increased or decreased significantly from the previous year.
- Evaluate. Is the set-aside improving outcomes? Is the amount sufficient to meet the student's needs?
- No “money parking”. TIPHA has the same claiming expectations.
- Foster Care transportation cannot be included in TIPAH plan. Foster Care transportation can be in a different set-aside.



District Set-Asides (Instructional Programs)

Equitable Services Requirement for Title I Set-Asides

Key Rule:

If the district reserves Title I funds for instructional activities or professional development for public Title I schools, it must also:

- Provide equitable services from those same funds to eligible private school children and educators

Examples of Funded Activities:

- Summer School
- Professional Development (for teachers & paraprofessionals)
- Parental Involvement Activities



Things to Keep in Mind-Supplemental District Set-Asides

Supplement, Not Supplant (SNS)

- All plans must be reviewed to ensure they do not violate SNS rules
- District set-asides follow the old SNS methodology

Evaluate Funding Placement

- Carefully examine activities, programs, or interventions:
 - Do they belong in a school allocation or a district set-aside?

Justification is Key

- Maintain a clear rationale for choosing district-level funding over direct school allocation
- Be prepared to defend the decision based on need, efficiency, or broader impact



Supplemental District Set-Asides

Monitoring Findings: Misuse of District Set-Asides

What USED Found:

- Funds from district set-asides were used or distributed to schools
 - Without considering school poverty levels or
 - Ignoring per pupil allocation (PPA) requirements
- Contact your Program Manager if needed for technical assistance to ensure compliance with Title I fund distribution rules.



Supplemental District Set-Asides

Rationale & Requirements for District Set-Asides

-Clear Rationale is Essential: Set-asides must have a documented and justifiable purpose

Examples include:

- LEA Administration
- District-sponsored Title I summer school (serving multiple schools)
- Pre-K Programs

-Private School Consultation Required

- If serving private schools, districts must consult with private school officials during the planning of supplemental set-asides

-Unallowable Set-Asides

- **NO** - Supplies or technology purchases without a tie allowable activity are not permitted
- **YES** - Place bulk purchases (e.g., supplies, tech) in schoolwide program plans



Supplemental District Set-Asides

Examples of Allowable District Set-Asides:

- Job Embedded Professional Development
 - Instructional Coaches at Title I schools with identified needs
- Extended learning time for Title I schools
 - After-school programs, summer learning, or extended day



Consultation Requirements Title I Set-Asides

- **Why it matters:**
 - Reserving funds at the district level reduces funds available for individual schools
 - Therefore, stakeholder input is required as part of the LEA plan
- **Who must be consulted:**
 - Teachers, Principals, Pupil Services Personnel (where appropriate), Parents of children in participating schools
 - Consultation with **private school officials must** occur before any decisions on set-asides are made



District Set-Asides

District's total allocation

\$ 2,460,545.00

— District's set-asides

— 326,215.00

**Amount available to
allocate to schools**

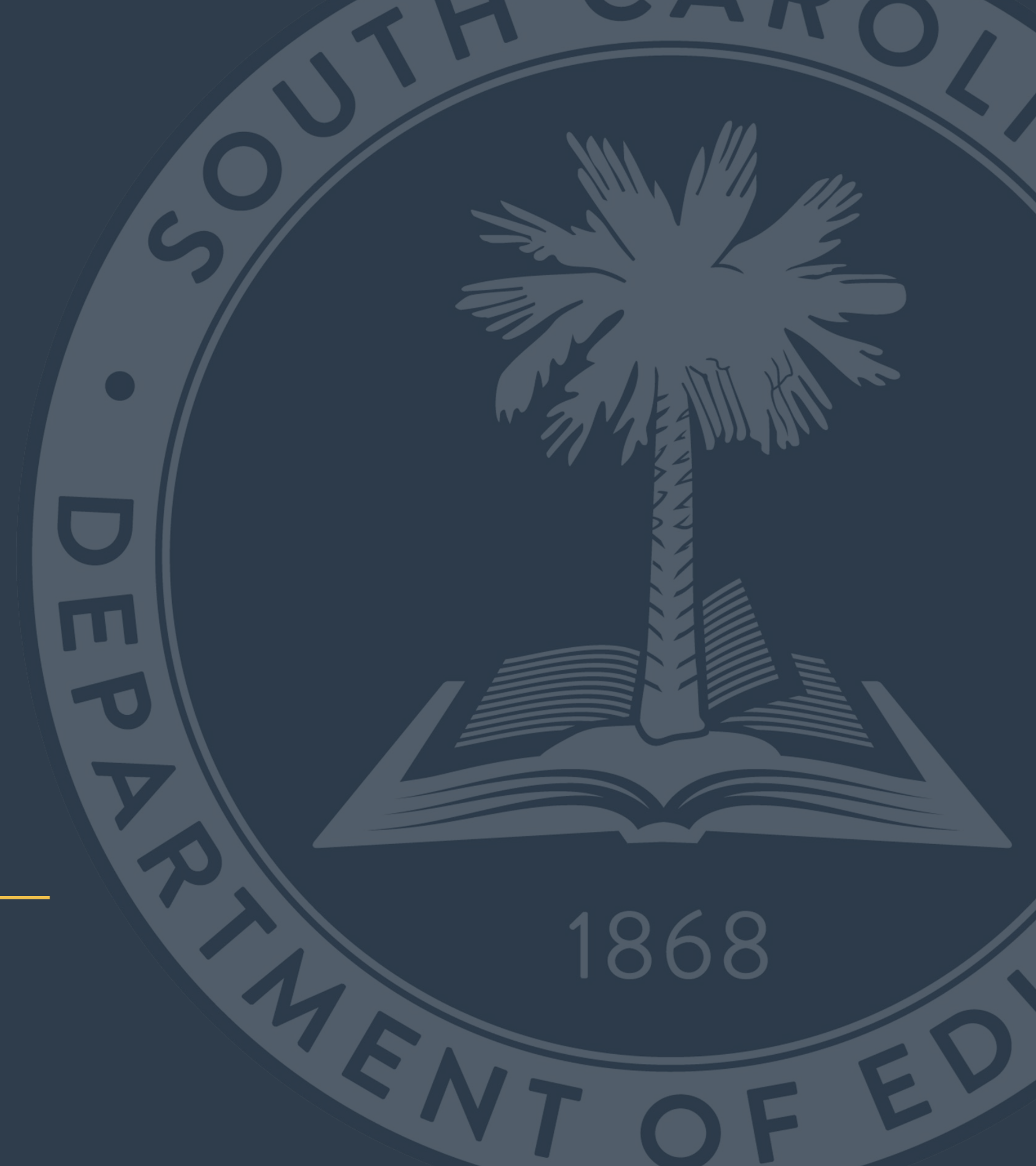
\$2,134,330.00



Table Talk: Questions regarding District Level Set Asides



School Allocations



School level Allocations

- The district has discretion in determining the per-pupil amount.
- Schools must be served by rank order according to the school eligibility page.
- This amount may be determined by a formula with the same per pupil amount in each of the schools served.
- The district may also determine poverty bands with a lesser per pupil amount allocated to the poverty band with a lesser poverty percentage.
- The district must provide the highest-ranked poverty school with more funding or equal to the amount given to the other served schools.
- Remember that **poverty** is the only factor on which a district may determine funding. In other words, an LEA may not allocate funds based on the instructional model, educational need, or any other non-poverty factor. *Section 1113 (1)(A)(3)*



GEMS Eligibility Page

School Name (9 Buildings)	LEA ID - School Number	Grade Span	Service	K-12 Public Enrollment	K-12 Private School Count	All Students (K-12 Public Enrollment + Private School count)	Poverty Factor	K-12 Low Income Students						Sort Order (Asc)	Eligibility For Service
								Public Count	Adjusted Public Count	Private Count	Total Low-Income J+K	Percent (I+K)/G	Adjusted Percent L/G		
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
Johnston Elementary	1901005	PK-5	Schoolwide ▼	216	0	216	PIP (Pupils in Poverty) ▼	186	186	0	186	86.11 %	86.11 %		<input checked="" type="checkbox"/>
Douglas Elementary	1901003	PK-5	Schoolwide ▼	193	0	193	PIP (Pupils in Poverty) ▼	165	165	0	165	85.49 %	85.49 %		<input checked="" type="checkbox"/>
Johnston-Edgefield-Trenton Middle	1901009	6-8	Schoolwide ▼	389	0	389	PIP (Pupils in Poverty) ▼	297	297	0	297	76.35 %	76.35 %		<input checked="" type="checkbox"/>
W. E. Parker Elementary	1901007	PK-5	Schoolwide ▼	320	0	320	PIP (Pupils in Poverty) ▼	234	234	0	234	73.13 %	73.13 %		<input checked="" type="checkbox"/>
Strom Thurmond High	1901002	9-12	None ▼	725	0	725	PIP (Pupils in Poverty) ▼	468	468	0	468	64.55 %	64.55 %		<input checked="" type="checkbox"/>
Merriwether Elementary	1901008	PK-5	Schoolwide ▼	742	0	742	PIP (Pupils in Poverty) ▼	360	360	0	360	48.52 %	48.52 %		<input checked="" type="checkbox"/>
Merriwether Middle	1901010	6-8	None ▼	354	0	354	PIP (Pupils in Poverty) ▼	170	170	0	170	48.02 %	48.02 %		<input checked="" type="checkbox"/>
Strom Thurmond Career and Technology Center	1901995	9-12	None ▼	0	0	0	Select... ▼	0	0		0	0.00 %	0.00 %		<input type="checkbox"/>
Central Office (for ATSI only)	1901-CO		None ▼	0	0	0	Select... ▼	0	0		0	0.00 %	0.00 %		<input type="checkbox"/>
Totals:				2939	0	2939		1880	1880	0	1880	63.97 %	63.97 %		

Methods for Determining Poverty Rates

A district may use **one option** for an apples-to-apples comparison:

Option 1: Meal Data

- Free and Reduced Lunch Count
- National School Lunch Program application

Option 2: Direct Certification

- Supplemental Nutrition Assistance Program (SNAP)
- Temporary Assistance for Needy Families Program (TANF)

Option 3: Pupils in Poverty (Highly recommended and provided by SCDE)

- Supplemental Nutrition Assistance Program (SNAP)
- Temporary Assistance for Needy Families (TANF)
- Medicaid (within three years)
- Foster Care, Migrant, and Homeless/Runaway



School Eligibility and Fund Distribution

School Eligibility Criteria

A school may receive Title I funds if:

$\geq 35\%$ of students are from low-income families, or
The school's poverty rate \geq district's average poverty rate

LEA Fund Distribution Options

LEAs may choose one or more of the following rules:

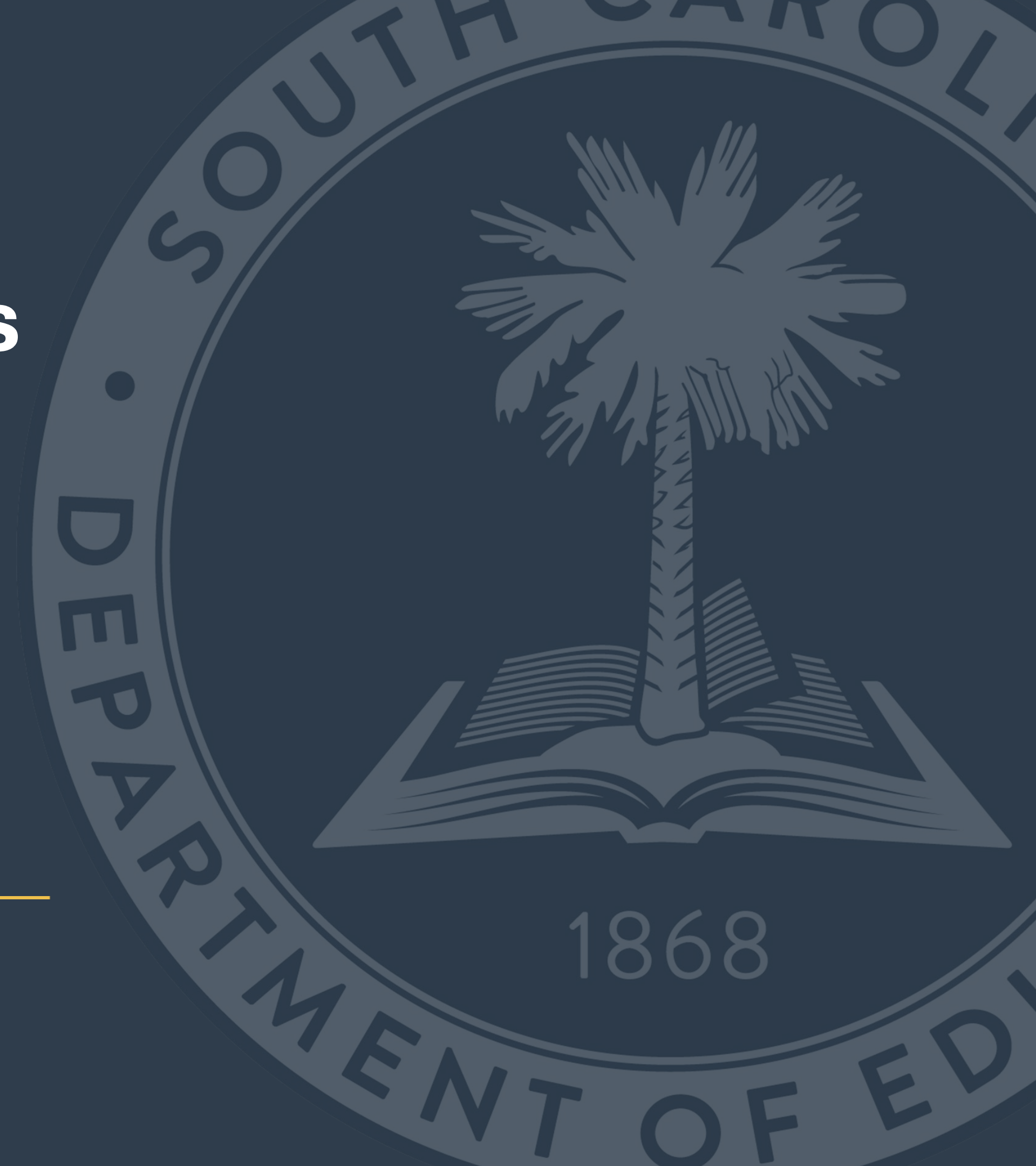
- **75% Rule**
(Prioritize schools with $\geq 75\%$ poverty first)
- **Grade Span Rule**
(Distribute funds by grade level groupings – e.g., K–5, 6–8, 9–12)
- **Small District Exemption**
(Districts with $< 1,000$ students have more flexibility)
- **High School Rule**
(May serve high schools under 75% before lower-grade schools)



Allocations to Served Schools

School	Poverty Factor	Low Income		School Allocations		
		Adjusted Percent	Adjusted Public Count	Sort Order	PPA	Allocation
A	B	C	D	E	F	G D x F
West End Elementary	PIP (Pupils in Poverty)	80.65%	498.05		950.00	\$473,147.50
McKissick Elementary	PIP (Pupils in Poverty)	78.36%	359.97		940.00	\$338,371.80
Crosswell Elementary	PIP (Pupils in Poverty)	78.04%	352.27		940.00	\$331,133.80
Pickens Middle	PIP (Pupils in Poverty)	76.79%	405.41		930.00	\$377,031.30
Liberty Primary School	PIP (Pupils in Poverty)	76.59%	354.75		930.00	\$329,917.50
Liberty Elementary	PIP (Pupils in Poverty)	75.92%	339.53		930.00	\$315,762.90
Hagood Elementary	PIP (Pupils in Poverty)	75.03%	387.48		750.00	\$290,610.00
Liberty Middle	PIP (Pupils in Poverty)	73.92%	340.47		650.00	\$221,305.50
Total Adjusted Public Count:			3037.93		Total Allocations:	\$2,677,280.30
Remaining:						(\$0.00)

Schoolwide Programs



Schoolwide Programs – Key Requirements

Supplement, Not Supplant

Targeted Assistance Schools:

Title I funds must *supplement* services for eligible students — not replace state or local funding.

Schoolwide Programs:

Must receive their equitable share of state and local resources *before* using Title I funds.

Allowable Use of Funds

All expenditures must be:

Necessary, Reasonable, & Allocable to achieving Title I goals

Consistency with Program Purpose

Use of Title I funds should always be consistent with the program requirements and the general uses of federal funds.



Purpose and Benefits of Schoolwide Programs

Maximize Funding Flexibility

- Enables strategic use of federal, state, and local resources
- Promotes innovative, schoolwide strategies tailored to student needs



Whole-School Reform

- Supports comprehensive reform efforts
- Prioritizes improving outcomes for lowest-achieving students
- Empowers schools to implement sustainable, systemic changes

Leverage Multiple Funding Streams

- Encourages alignment of Federal and non-Federal funds
- Reduces duplication and increases impact
- Enhances coordination of services and supports

Needs-Based Planning

- Driven by a comprehensive needs assessment
- Schoolwide plans address academic, social-emotional, and behavioral needs
- Informed by data, stakeholder input, and continuous improvement cycles

Schoolwide Program Core Components

1. Comprehensive Needs Assessment

Data-driven review of academic, behavioral, and contextual factors

Identifies strengths, gaps, and areas of greatest need

2. Comprehensive Schoolwide Plan

Aligns strategies and resources with identified needs

Involves all stakeholders: educators, families, and community partners

Focused on improving outcomes for *all* students

3. Annual Review of the Title I Plan

Evaluates the impact of implemented strategies

Informs adjustments and continuous improvement

Ensures accountability and effectiveness



Comprehensive Schoolwide Plan



provide opportunities for all children, including each of the subgroups of students (as defined in section 1111(c)(2)) to meet the **challenging State academic standards**;



use methods and instructional strategies that **strengthen the academic program** in the school, increase the amount and quality of learning time, and help provide an enriched and accelerated curriculum, which may include programs, activities, and courses necessary to provide a **well-rounded education**; and

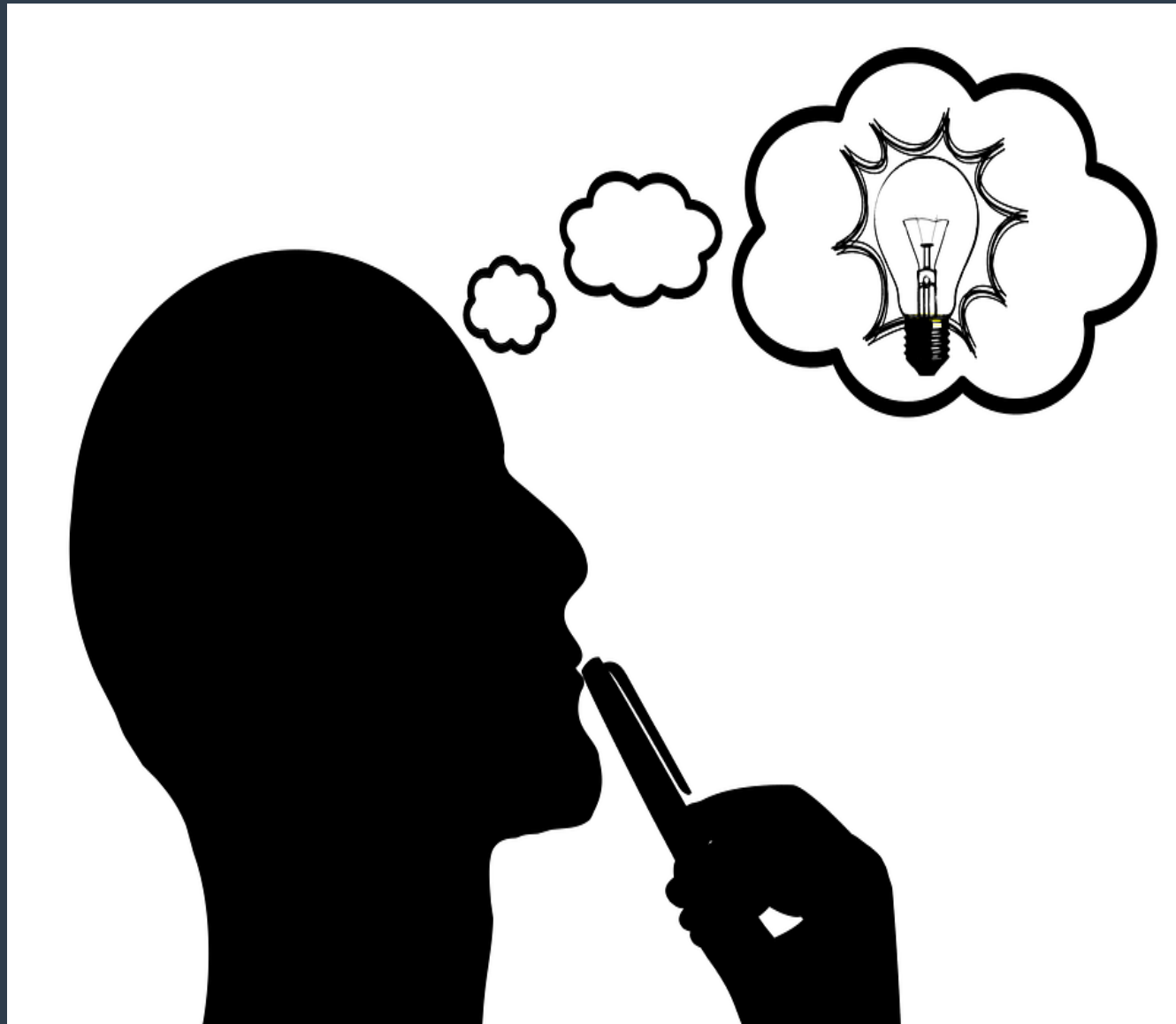


Determining Allowability

- **Costs must be:**
 - ✓ Necessary
 - ✓ Reasonable
 - ✓ Allocable
 - ✓ Conform to EDGAR
 - ✓ Meet Terms and Conditions of the Grant Award
 - ✓ Consistent with State and Local Policies
 - ✓ Provided Consistent Treatment
 - ✓ Adequately Documented
 - ✓ Supplemental



Questions to Ponder



When determining if expenditures are appropriate, ask the following questions:

- How does this expenditure directly support student achievement for at-risk students?
- How does this expenditure directly support meaningful professional development?
- How does this expenditure increase the participation of parents in school activities or assist parents to support student achievement?
- How does this expenditure foster continuous improvement? Have activities been evaluated to modify or discontinue?

Allowable vs Non-allowable

Allowable

Salaries and Benefits

- Hiring teachers to reduce class size
- Providing remediation services for struggling students

Professional Development

- Conference attendance for instructional staff
- Bringing in speakers or consultants to train teachers

Instructional Supplies and Materials

- Supplemental reading or math programs
- Books and resources for Professional Learning Communities (PLCs)
- May include materials supporting subjects beyond ELA and Math

Family Engagement Activities

- Events and activities that increase family involvement in student learning

Extended Day Programs

- After-school programs, tutoring, or enrichment activities that extend learning time

Student Incentives (*Capped at 1% of school allocation*)



Allowable vs Non-allowable

Non-Allowable

Entertainment Costs

- Includes amusement, social activities, ceremonial events, and any associated costs

Certain Field Trips

- All field trips require prior approval for allowability
- Must have a clear connection to student achievement or the program's academic goals
- Non-allowable examples: visits to amusement parks, fairs, or purely recreational locations

Gift Certificates / Gift Cards

- Treated as cash equivalents
- Prohibited due to tracking and auditability issues

Under the Trump Administration, Districts are encouraged to avoid activities that could be considered DEI.



Keep in mind...

USED has not released allocations for:

Title I, Part C – Migrant Education

Title II, Part A – Teacher and School Leader Support

Title III, Part A – English Learners

Title IV, Part A – Student Support and Academic Enrichment

Title IV, Part B – 21st Century Community Learning Centers

These allocations are in process as usual:

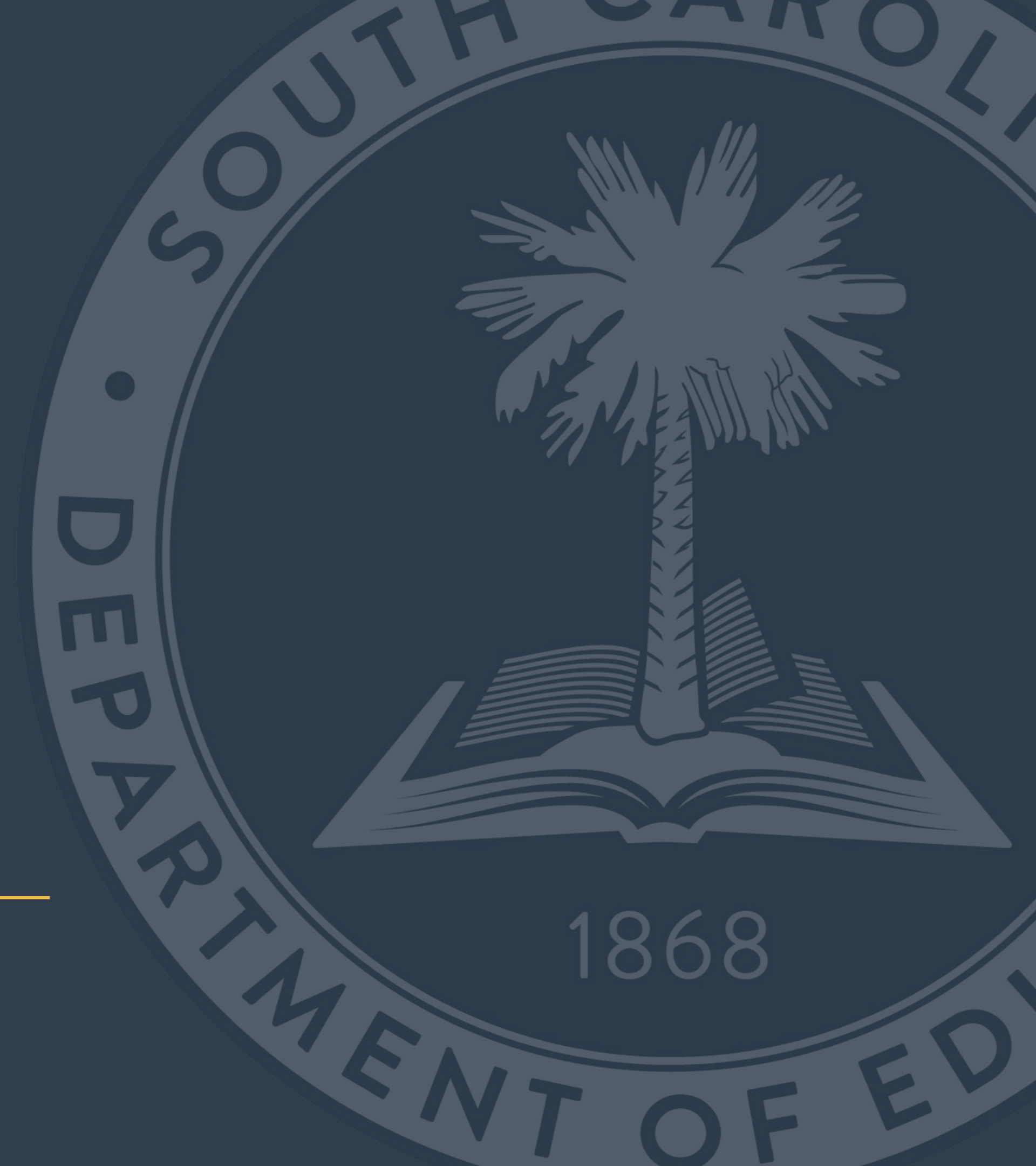
Title I, Part A

Title I, Part D – Neglected and Delinquent

McKinney Vento



Related Documents



Professional Development Form

The Title I Professional Development Tracker Form is a tool that districts will need to use to document all professional learning activities. This form helps ensure all professional development efforts are aligned with Title I goals.

Grant	Conference Name and Location	School/LEA Programs, Maximum Number of Attendee(s) by School, Role of Attendee(s)	Estimated Total Cost	Estimated Cost Per Attendee	Justification/Connection to School Needs Assessment	Evaluation and Follow-Up



Field Trip Request Form

School	Grade	# of Students	Location/ Name of Program	Description of Program	Units of Study and Standard	Standards-Aligned activities for field experiences	Field Trip Date(s)	Cost of Program	Transportation Cost



LEA Parent and Family Engagement Policy

LEA's must incorporate their written parent and family engagement policy into its local plan that you submit to SCDE.

If the plan is not satisfactory to the parents of Title I schools, the LEA must submit any parent comments along with the LEA's plan.



Private School Documentation

- All Private School documentation – Related Document section GEMS
- Document to include:
 - Invitations with established deadlines for all private schools within the geographical boundaries and outside of your geographical boundaries (Meeting attendance)
 - Letters of Intent with established deadline (original mailing and returned responses)
 - Certified Mailing receipts with USPS stamp or receipt, returned mail, or any email communications (additional contact proof for no response received or any decline of funding).



What are the allowable costs in the federal grants?

ESEA Law and Regulations

- Foundational federal statute for K–12 education
- Establishes core program requirements and funding purposes

ESEA Program Guidance

- Issued by the U.S. Department of Education
- Provides clarification and interpretation of the law for program implementation

2 CFR Part 200 – Uniform Guidance

- Outlines basic cost principles for federal grants
- Covers allowability, allocability, reasonableness, and documentation of costs

34 CFR Part 76 – General USDE Rules

- Specific regulations from the U.S. Department of Education
- Applies to the administration of federal education programs

USED Policy Letters

- Offer official clarification or guidance on specific scenarios
- Often issued in response to state or district inquiries

Understanding these layers helps ensure full compliance and effective program implementation.

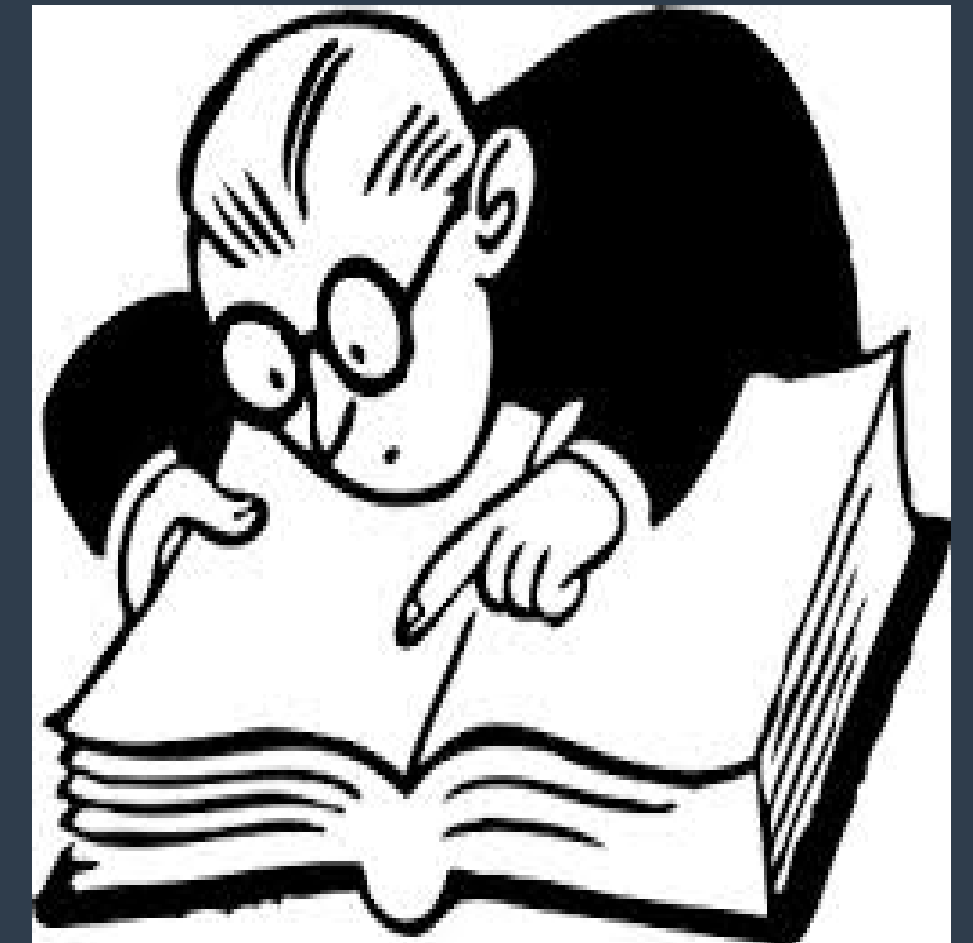


TABLE TALK

- What am I concerned about?
- What do I feel good about?
- What do I need clarity on?
- What new information have I gained?



Fiscal Compliance



Documentation

2 CFR § 200.403(g) – Cost Principles

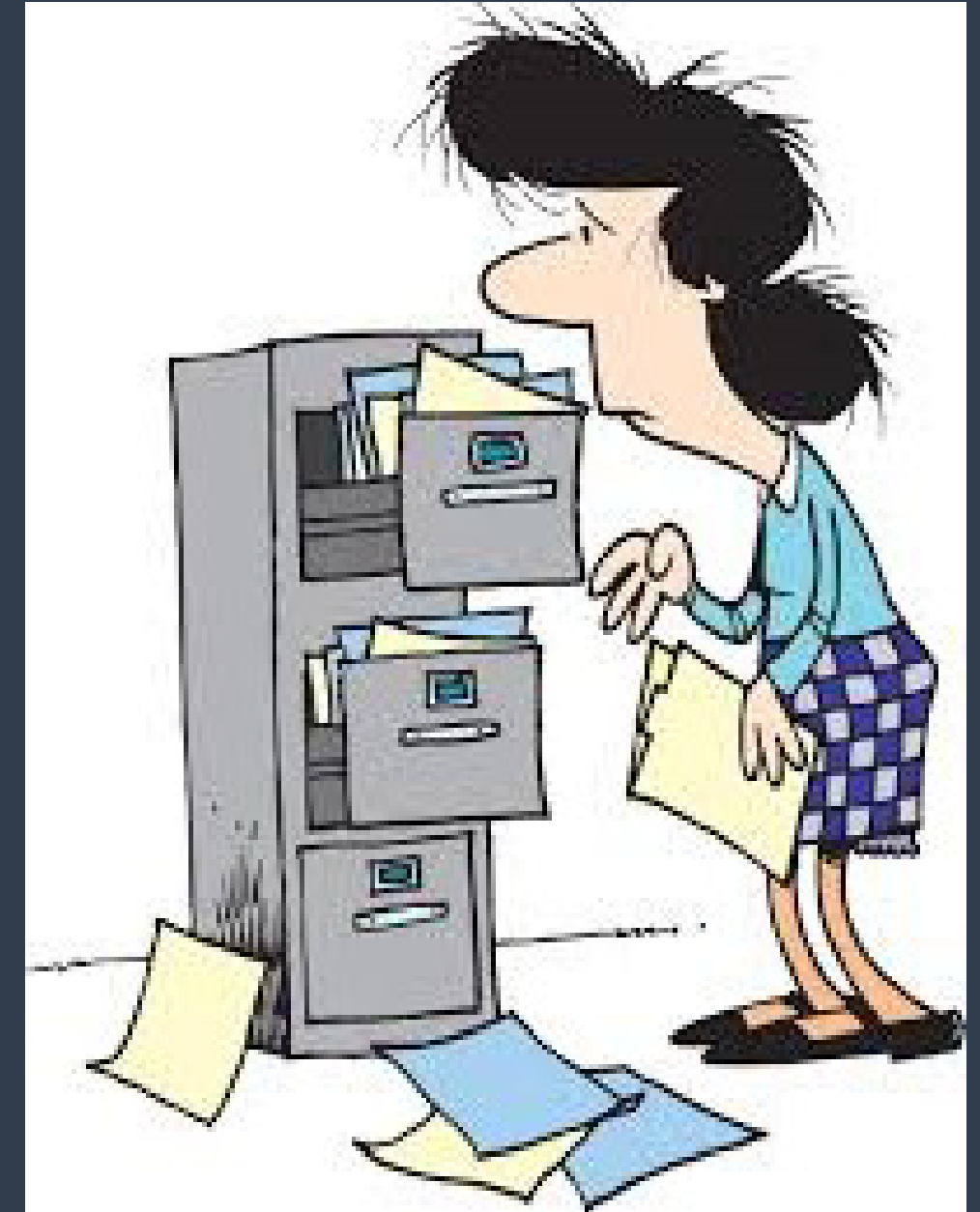
- All costs must:
- Be adequately documented
- Have clear supporting records

34 CFR §§ 76.730 – 76.731 – USDE Requirements

LEAs (Local Education Agencies) must maintain detailed records that show:

- Compliance with all applicable program requirements
- The amount of funds received
- How funds were used
- The total cost of each project or activity
- Other records needed to support a clear and effective audit trail

Strong documentation ensures accountability, supports monitoring, and protects funding integrity.



GEMS Application Expectation- Escalation Model



Claiming Deadline Reminder

- Districts must submit quarterly claims.
- Submitting timely claims is not only a good fiscal practice but can save from problems at the end of a grant.
- Claims will be tracked on a quarterly basis.
- The GAPS system shuts down automatically on Aug 15.
- OFSA has no power over this automatic shutdown.

Reporting Period	Deadline for submitting claims
July 1-Sept 30	November 15
Oct 1-Dec 31	February 15
Jan 1-March 31	May 15
April 1-June 30	August 15



Claiming Expectation Emails

Quarterly Tracking by OFSA

The Office of Federal and State Accountability (OFSA) will track claims quarterly to ensure:

- Funds are being expended responsibly
- Timely use of federal grant allocations
- Compliance with grant requirements

District Notification Emails

Districts will receive an email each quarter from Sharay Mosley indicating one of the following:

- a) *“Your district has not made any claims for this quarter.”*
- b) *“Your district has failed to meet the claiming criteria for this quarter.”*
- c) *“Your district has met the claiming criteria for this quarter.”*

Why This Matters

- OFSA monitors claiming patterns across districts
- Helps ensure districts spend funds effectively and on time
- Supports strong fiscal management and audit readiness

Watch for quarterly emails from Sharay Mosley—your compliance may depend on it!



Claiming Expectations

Grant	Claiming Percentage Expectation Y1/Q1 (July 1 - Sept 30)	Claiming Percentage Expectation Y1/Q2 (Oct 1 - Dec 31)	Claiming Percentage Expectation Y1/Q3 (Jan 1 - March 31)	Claiming Percentage Expectation Y1/Q4 (April 1 - June 30)
	Deadline for Claiming – November 15	Deadline for Claiming – February 15	Deadline for Claiming – May 15	Fiscal Year End Deadline for Claiming – August 15
<i>Title I</i>	-	40%	60%	85%
<i>Title II</i>	-	15%	30%	50%
<i>Title IV</i>	-	15%	30%	50%
<i>Title V</i>	-	0%	0%	50%

Grant	Claiming Percentage Expectation Y2/Q1 (July 1 - Sept 30)	Claiming Percentage Expectation Y2/Q2 (Oct 1 - Dec 31)	Claiming Percentage Expectation Y2/Q3 (Jan 1 - March 31)	Claiming Percentage Expectation Y2/Q4 (April 1 - June 30)
	Deadline for Claiming – November 15	Deadline for Claiming – February 15	Deadline for Claiming – May 15	Fiscal Year End Deadline for Claiming – August 15 Grant Closing Deadline for Claiming – December 30
<i>Title I</i>	85%	90%	95%	100%
<i>Title II</i>	60%	75%	90%	100%
<i>Title IV</i>	60%	75%	90%	100%
<i>Title V</i>	60%	75%	90%	100%

Carryover Restrictions

15% Carryover Limitation

- At the end of the project period, carryover is calculated based on the final Expenditure Report
- For districts receiving \$50,000 or more, the carryover limit is 15% of the next year's allocation

Waiver Option

- A district may submit a waiver request to the Office of Federal and State Accountability (OFSA)
- Waivers can be granted only once every three years, even if a district exceeds the limit multiple times

Plan ahead and monitor expenditures to avoid exceeding the carryover cap.



SAMPLE ACKNOWLEDGEMENT FORM

ACKNOWLEDGEMENT OF CARRYOVER LIMITATION EXCEEDED
Title I, Part A Funds

The Office of Federal and State Accountability (OFSA) has shared with the state the Title I claiming expectations below to help districts stay on target with their quarterly expensing.

Grant	Claiming Percentage Expectation/Target Y1/Q1 (July 1 - Sept 30)	Claiming Percentage Expectation/Target Y1/Q2 (Oct 1 - Dec 31)	Claiming Percentage Expectation/Target Y1/Q3 (Jan 1- March 31)	Claiming Percentage Expectation/Target Y1/Q4 (April 1 - June 30)
	Deadline for Claiming - November 15	Deadline for Claiming - February 15	Deadline for Claiming - May 15	Fiscal Year End Deadline for Claiming - August 15
Title I	-	40%	60%	85%
Grant	Claiming Percentage Expectation/Target Y2/Q1 (July 1 - Sept 30)	Claiming Percentage Expectation/Target Y2/Q2 (Oct 1 - Dec 31)	Claiming Percentage Expectation/Target Y2/Q3 (Jan 1- March 31)	Claiming Percentage Expectation/Target Y2/Q4 (April 1 - June30)
	Deadline for Claiming - November 15	Deadline for Claiming - February 15	Deadline for Claiming - May 15	Fiscal Year End Deadline for Claiming - August 15
				Grant Closing Deadline for Claiming - December 30
Title I	85%	90%	95%	100%

Does «Grantee_Organization» currently have these claiming expectations in place for their Title I schools and administrative budgets? ☐ Yes ☐ No

If yes, what steps will be taken to ensure that the targets are met moving forward?

If no, please outline what controls were in place with claiming expectations, describe the actions that will be implemented to ensure that funds will be expended moving forward, and check the box below to agree to input these claiming expectations in the future.

☐ By checking this box I agree that the above claiming expectations will be implemented in the future

By signing below, I acknowledge that «Grantee_Organization» has exceeded the Title I, Part A 15% carryover limitation by \$«Award_Amount» and I have been made aware that an amended grant award notification will be issued to reduce «Subaward_Name» by this amount.




Waiver Request Form

The official Title I Waiver Request Form is available on the South Carolina Department of Education (SCDE) website.

[SCDE Title 1 Carryover Request Form](#)

SCDE Due Date:
November 15

SOUTH CAROLINA
DEPARTMENT OF EDUCATION

WAIVER REQUEST TO EXCEED CARRYOVER LIMITATIONS
TITLE I, PART A FUNDS

District Name: _____

Name and Title of Person Submitting this Request: _____

Email address: _____ Phone: _____

Please mark the check box below indicating that the District is requesting a waiver to exceed the 15% Title I carryover limitation. Only districts that received \geq \$50,000 in Current Funds for SY2023-2024 and wish to carry 15% or more are required to complete this form

☐ Title I, Part A (To exceed 15%, allowable once every 3 years)

Districts must respond to the items listed below in order to receive consideration for exceeding the carryover limitation.

1. Please describe why the district did not spend the awarded funds during the SY2023-2024 school year. Provide justification as to why the district should be considered to exceed the carryover limitation.

2. Describe actions/activities that will be implemented during the SY2023-2024 school year to ensure that funds will be expended and carryover funds, if any, will not exceed the limitation in the following year.

Districts receiving approval to exceed the 15% carryover threshold for the SY2023-2024 school year will not be allowed another carryover waiver until closing out the 2026-2027 school year.

All requests must be submitted in writing via email jrhodes@ed.sc.gov. The person submitting this request will be notified via email as to whether the carryover waiver request is approved or denied.



SAMPLE SUPERINTENDENT LETTER



**STATE OF SOUTH CAROLINA
DEPARTMENT OF EDUCATION**

December 3, 2024

«Name_of_Authorized_Official»
«Grantee_Organization»
«Address_Line_1»
«Address_Line_2»
«City», «St» «Zip4»

Dear «Greeting»:

According to Section 1127(a) of the Every Student Succeeds Act (ESSA), not more than 15% of the Title I, Part A funds allocated to a district for any fiscal year may remain available for obligation by such agency for one additional fiscal year. This means that the district may not carry over more than 15% of its funds beyond September 30. Districts must ensure that at least 85% of Title I, Part A funds are obligated for activities no later than September 30 of the following fiscal year. This requirement limits the amount of funding that can be carried over to the subsequent year to ensure that funds are spent in a timely manner while providing services and support to students.

«Grantee_Organization» exceeded the 15% threshold by the amount of \$«Award_Amount». As a result, an amended grant award notification (GAN) will be issued to reduce the district's «Subaward_Name» subaward by this amount.

Please complete and sign the attached form acknowledging that you agree with the above referenced amount and return it to Jennifer Rhodes at jrhodes@ed.sc.gov. If you have any questions or concerns, please contact Jennifer at 803-734-8110, or via the email above.

Sincerely,

Fiscal Process and Procedures as related to final allocations (Title I, II, IV, V and N&D)

- OFSA completes and releases final allocations for Title I, II, IV, V and N&D prior to attending the SCATA Fall Conference in October of each year.
- Grant Award Notifications are loaded into the agency's internal routing system for review (ART).
- OFSA awaits completion of ART routing. Superintendents then receive the GAN and Assurances/Terms and Conditions to be signed and returned.
- OFSA loads the final allocations into the GEMS application system for coordinators to then complete revisions.
- The SCDE Grants Accounting Office loads the final allocations into GAPS.
- Upon Director Approval of GEMS, coordinators may load final allocation budgets into GAPS for review.
- Jennifer Rhodes reviews and approves GAPS budgets once in receipt of signed award documents.



New Change to Fiscal Process

- Indirect cost rates will no longer be updated during the second year of Title I, II, III, IV, V and N&D grants as of the fall of 2025.
- LEAs must make updated changes to their indirect cost budgets within GAPS to reflect the newly negotiated rates.
- GEMS warning messages will remain in place under “Validation Messages” on the sections page.



Program Manager Assignments

<i>Jennifer Rhodes</i>	<i>Leslie Bloss</i>	<i>Makesia Sumpter</i>	<i>Theresa Gregory</i>	<i>Sharay Mosley</i>	<i>Sarah Wagers</i>	<i>Martha Walker</i>
Kershaw	Aiken	Abbeville	Anderson 1	Dillon 3	Barnwell 45	Allendale
Laurens 55	Clarendon Consolidated	Deaf and Blind-T2 only	Anderson 2	Dillon 4	Barnwell Consolidated	Bamberg Consolidated
Marlboro	Erskine	DJJ	Anderson 3	Fairfield	Chester	Beaufort
Richland 1	Florence 2	Edgefield	Anderson 4	Horry	Dorchester 2	Berkeley
Spartanburg 1	Florence 5	Florence 1	Anderson 5	Lee	Dorchester 4	Charleston
	Greenville	Florence 3	Calhoun	McCormick	Marion	Cherokee
	Greenwood 52	Greenwood 50	Colleton	Oconee	Newberry	Chesterfield
	Hampton	Greenwood 51	Darlington		Union	Laurens 56
	Limestone	Palmetto Unified	Georgetown		York 4	Lex/Rich 5
	Pickens	Saluda	Lancaster			Lexington 1
	Richland 2	Spartanburg 5	Orangeburg			Lexington 2
	SC Public Charter	Spartanburg 6	Spartanburg 3			Lexington 3
	Spartanburg 7		Spartanburg 4			Lexington 4
	Williamsburg		Sumter			Spartanburg 2
	York 1					York 3
	Jasper					

Resources

<https://ed.sc.gov/policy/federal-education-programs/title-i/scde-title-1-carryover-request-form/>

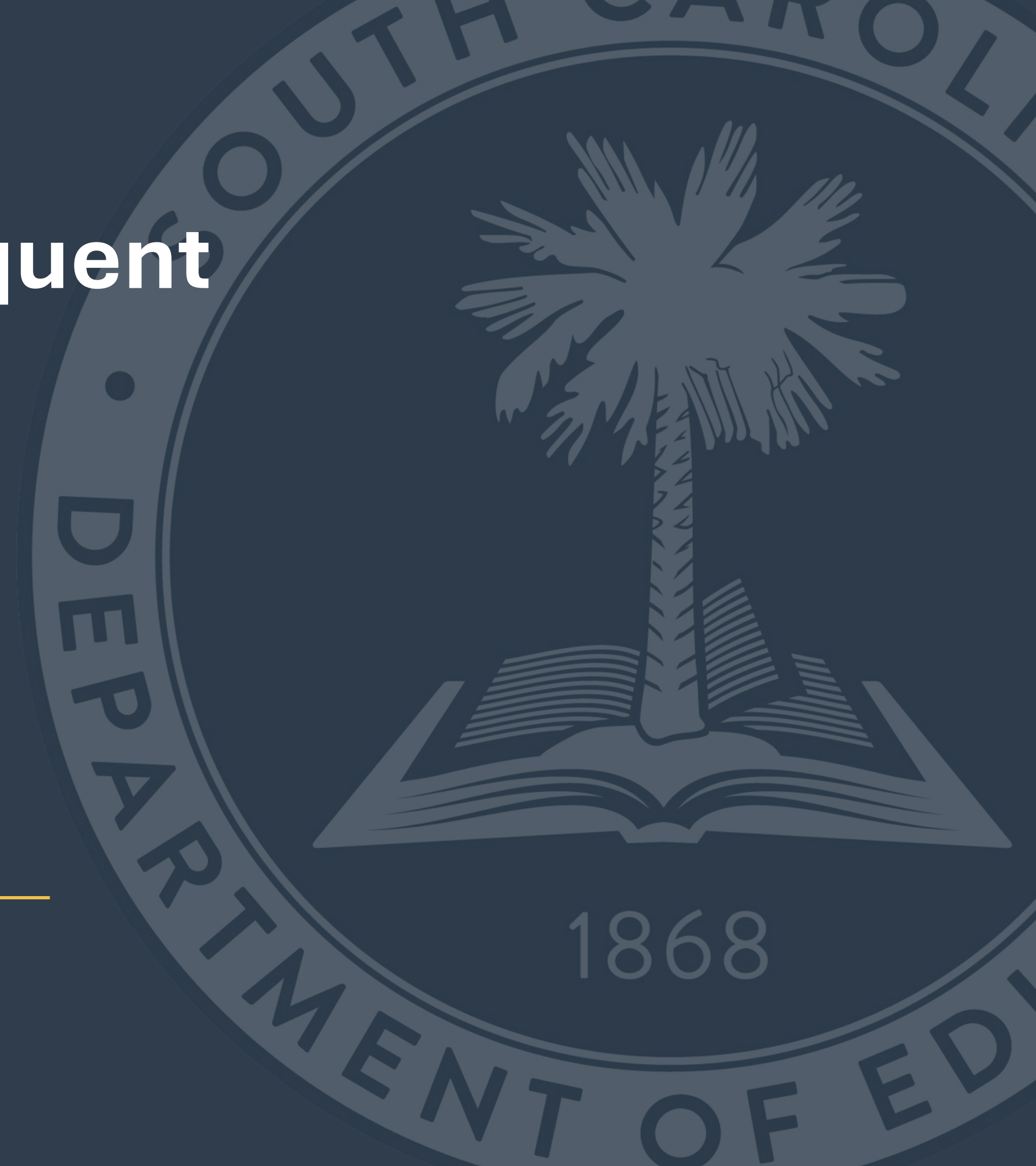
<https://ed.sc.gov/policy/federal-education-programs/title-i/>

<https://ed.sc.gov/policy/federal-education-programs/title-i/updated-claiming-expectations/>

<https://ed.sc.gov/policy/federal-education-programs/esea-title-ii-part-a1/allowable-use-of-funds/>



Neglected and Delinquent updates



Eligibility Audit

To ensure that Neglected and Delinquent facilities are functioning in alignment with their intended purpose, an audit will be conducted.



Purpose of a Neglected Facility

A public or private residential facility other than a foster home, that is operated primarily for the care of children who have been committed to the institution or voluntarily placed in the institution under applicable state laws because of the abandonment, neglect, or death of their parents or guardians



Purpose of a Delinquent Facility

A public or private residential facility that is operated primarily for the care of children who have been adjudicated to being delinquent or in need of supervision because of the violation of state or local laws.



The primary purpose of the facility must be stated in its mission/charter.

Your "Who" must be clearly identified.




What to Expect

- The State Coordinator will conduct a training session (date to be determined) to provide information regarding the upcoming audit.
- LEAs will be responsible for facilitating the completion of the audit questionnaire.



N&D Eligibility Questionnaire

The due date for the questionnaire will be communicated during the training session. Once all questionnaires have been submitted, audit results will be shared with LEAs (at a later time). These results will impact funding allocations for Fiscal Year 2027

SOUTH CAROLINA
DEPARTMENT OF EDUCATION

Office of Federal and State Accountability
Neglected and Delinquent Questionnaire

SECTION A: District Information

School District/LEA:

Title I Coordinator:

Residential Institution's Name:

SECTION B: Definitions

Based on its mission statement, charter, license or stated purpose that meets the criteria of Neglected and Delinquent (N&D) facility, as defined by the Every Student Succeeds Act, the participating residential facility must be designated as *either* Neglected *or* Delinquent. The students may be identified by either designation; however, the participating **residential facility must annually maintain this designation for funding purposes**. For example, if the participating facility is designated Delinquent but the student caseload count for this year is majority Neglected, the caseload count is still recorded as Delinquent.

Neglected Institution-Primary purpose stated in its mission/charter: A public or private residential facility other than a foster home, that is operated primarily for the care of children who have been committed to the institution or voluntarily placed in the institution under applicable state laws because of the abandonment, neglect, or death of their parents or guardians.

Delinquent Institution-Primary purpose stated in its mission/charter: A public or private residential facility that is operated primarily for the care of children who have been adjudicated to being delinquent or in need of supervision because of the violation of state or local laws.

Note: Programs where students are placed privately by their parents or guardians *do not meet* the definition of a neglected institution

SECTION C: Facility Eligibility *(Check All That Apply)*

☐ Is this institution operated primarily for the care of children who are abandoned, neglected, or who are committed because of

☐ Is this institution operated primarily for the care of children who have been adjudicated by appropriate state or local authorities to





Thank you for participating!

Please reach out to us if you have any questions:

- Leslie Bloss, lbloss@ed.sc.gov
- Theresa Gregory, tgregory@ed.sc.gov
- Sharay Mosely, smosely@ed.sc.gov
- Jennifer Rhodes, jrhodes@ed.sc.gov
- Makesia Sumpter, msumpter@ed.sc.gov
- Sarah Wagers, slwagers@ed.sc.gov
- Martha Walker, mwalker@ed.sc.gov



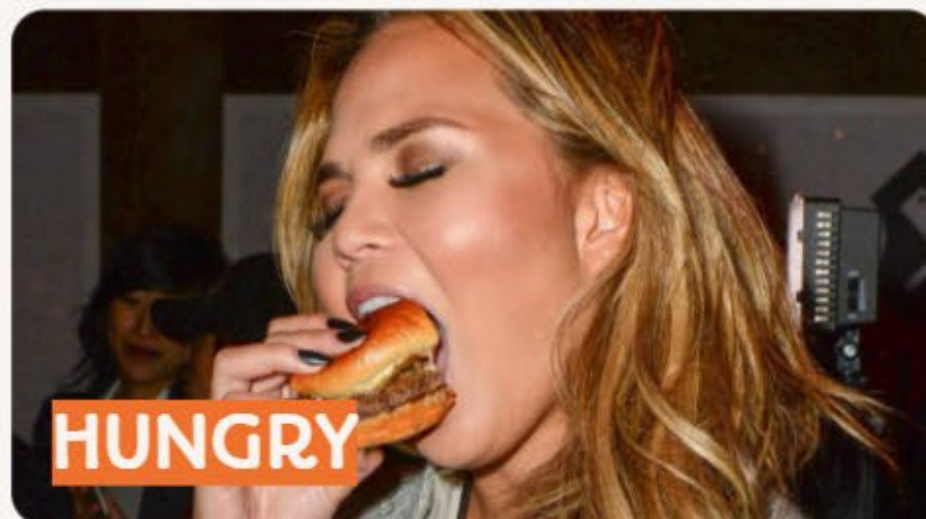
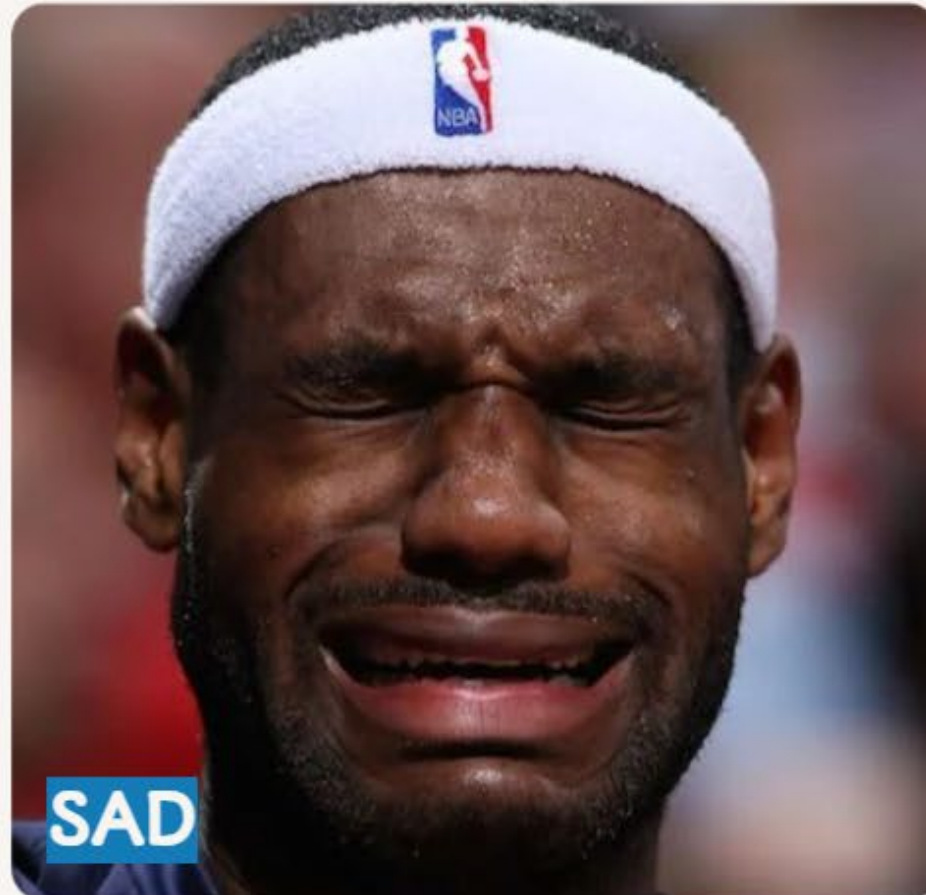
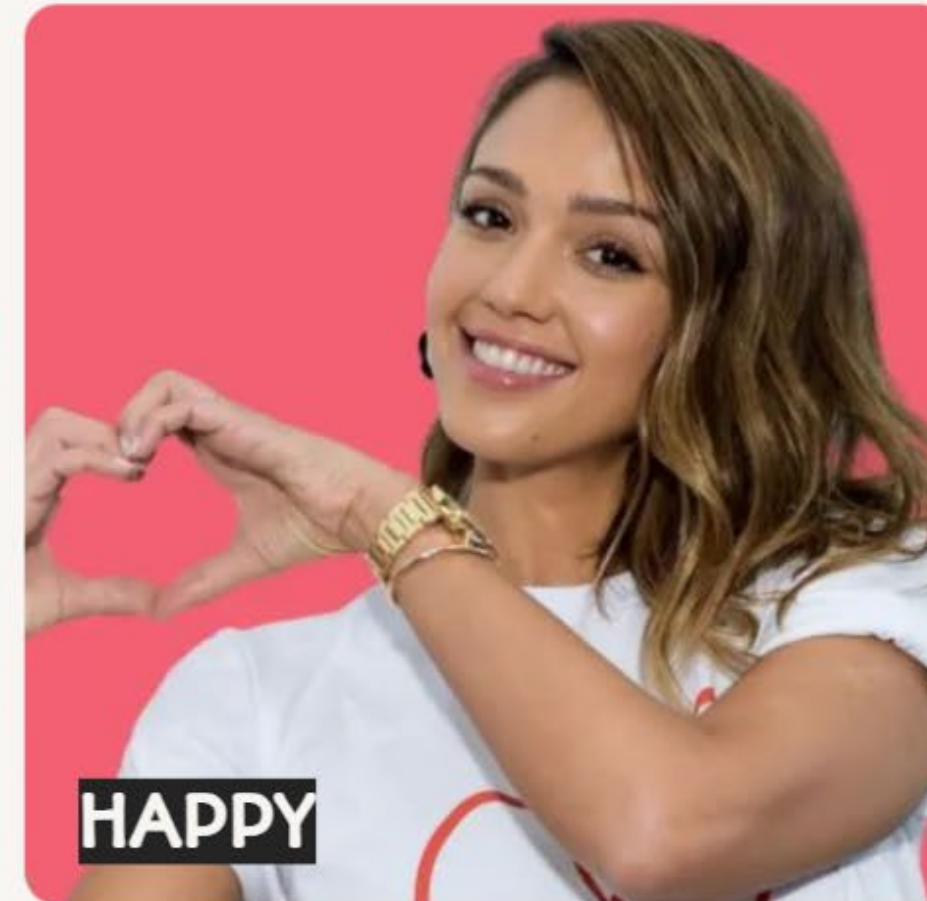
Day Two Agenda

- Title II
- Title IV
- Equitable Services
- Title V
- Q&A



Mood Gallery

How are you
feeling
coming into
Day 2?



Title II



**SOUTH CAROLINA
DEPARTMENT OF EDUCATION**

Agenda

- **General Information**
- **LEA Uses of Funds**
- **Continuous Improvement**





General Title II, Part A Information

Title II, Part A Non-regulatory Guidance



Overview

- The purpose of the Title II, Part A grant is to:
 - Increase student achievement consistent with challenging state academic standards
 - Improve the quality and effectiveness of teachers and principals
 - Increase the number of teachers and principals who are effective in improving student academic achievement in schools
 - Provide low-income and minority students greater access to effective teachers and principals



Key Definitions

Evidence-Based- An activity, strategy, or intervention that demonstrates a statistically significant effect on improving student outcomes or other relevant outcomes based on strong, moderate, or promising evidence or that demonstrates a rationale to improve student outcomes. (Section 8101(21))

Professional Development- It must be sustained, rather than consisting of stand-alone, one-day, or short-term workshops, and it must be intensive, collaborative, job-embedded, data-driven, and classroom-focused. (Section 8101(42))

Training- Typically refers to stand-alone, one-day, or short-term workshops. Unless explicitly mentioned in section 2101(c)(4)(B) or if the training is part of a professional development or school improvement plan, trainings are typically not able to be funded by Title II.



Allowable Uses of Title II, Part A Funds *Per ESSA Section 2101(c)(4)(B)*

Program Support & Oversight

- Administration, monitoring, and technical assistance *(vi)*

Professional Development & Training

- Evidence-based PD for teachers and leaders *(ii), (v), (viii), (ix), (xvii)*

Instructional Integration

- Integrate CTE content into academic instruction *(xviii)*

Data Use & Privacy

- Use student data while ensuring compliance with privacy laws *(xx)*

Workforce Support

- Recruit, hire, and retain effective educators *(v)*
- Reform certification and licensure systems *(i)*
- Establish/improve alternative certification routes *(iv)*

Educator Support Systems

- Support induction, mentoring, and early career development programs

Evaluation Systems

- Design or improve educator evaluation systems





LEA Uses of Funds

Title II, Part A Non-regulatory Guidance



District Uses of Title II Funds

When considering how to use Title II funds, the district must:

- Address the learning needs of all students. (Section 2103(b)(2))
- Focus, to the extent possible, on evidence-based decision-making. Use the funds to develop, implement, and evaluate comprehensive programs and activities that encompass the wide range of options provided in the ESEA. (Section 2103(b)(3)(D, E, & P))
- Prioritize the allocation of funds to high-need schools (e.g., schools identified for comprehensive or targeted support and improvement). (Section 2102(b)(2)(C))



District Uses of Title II Funds (continued)

When considering how to use Title II funds, the district must:

- Consult required stakeholders including teachers, principals, school leaders, paraprofessionals, charter school leaders, parents, community partners, and other stakeholders in the planning and implementation of Title II activities. (Section 2102(b)(3)(A))
- Funds made available under Title II, Part A must supplement, not supplant, non-Federal funds that would otherwise be used for activities authorized under Title II. (Section 2301)



District Uses of Title II Funds

Professional Growth & Development

- Ongoing, high-quality, and evidence-based professional learning
 - Instructional coaching, mentoring, and collaboration
 - Technology integration in teaching
- Recruitment & Retention of Effective Educators
- Teacher residency and grow-your-own programs
 - Induction and mentoring for new teachers
 - Recruiting individuals from other fields to become teachers, principals, or other school leaders

Supporting Effective Instruction

- Teacher and leader evaluation and support systems
- Targeted class size reduction strategies
- Evidence-based instructional practices

Specialized Training & Certification

- STEM, literacy, and special education support



Recruit, Hire, and Retain Effective Teachers

Recruitment & Hiring Support

- Signing bonuses
- Expert help screening candidates
- Early hiring assistance
- Recruitment fair registration & travel
- Incentive pay in high-need subject/specialty areas

Induction & Mentoring Programs

- Structured mentoring for new educators
- Early release time for mentors
- Compensation for mentoring
- Evidence-based PD for novice educators & mentors

Evaluation & Professional Growth

- Training on feedback, performance differentiation, and data use
- Systems to audit quality of evaluation/support systems
- Use of evaluations to inform PD and personnel decisions

Classroom & Career Support

- Class size reduction
- Professional advancement and leadership opportunities
- Compensation for added leadership roles



Continued Educator Supports

Recruiting from Other Professions

- Attract mid-career professionals, veterans, and high-achieving recent graduates
- Support transition into teaching or leadership roles

➤ *Supports alternative pathways to certification and fills critical vacancies*

School Climate & Feedback Systems

- Develop tools to gather and publicly report educator feedback
- Improve school working conditions through actionable inputs

➤ *Fosters transparency and a more supportive school environment*

Teacher Residency Programs

- Fund residencies that combine coursework with classroom experience
- Must meet ESSA-defined quality criteria

➤ *Builds a strong pipeline of well-prepared, committed teachers*

Time for Collaboration & Growth

- Enable peer observations, joint planning, and educator-led training
- Use substitutes as needed to provide release time during the school day

➤ *Strengthens instructional practices and builds professional culture*



Class Size Reduction (CSR)

LEAs may reduce class size by creating additional classes in a particular grade or subject and placing effective teachers hired with program funds in those classes. LEAs must ensure it is using an evidence-based strategy to reduce class size to a level demonstrated to improve student achievement.

- Federal funds cannot be used to meet state or local class size requirements.
- The school and grade level for CSR must be documented in the Needs Assessment and listed in the online application.
- CSR cannot be used for gifted or SPED programs.



Professional Development Definition

The term “professional development” means activities that are –

1. An integral part of the district’s strategies for providing educators...with the knowledge and skills necessary to enable students to succeed in a well-rounded education and to meet challenging state standards; and
2. Sustained (not stand-alone, 1-day, or short-term workshops), intensive, collaborative, job-embedded, **data-driven**, and classroom-focused.
3. Evidenced-based and proven effective



PD – Teachers, Principals, Other School Leaders

Building Essential Skills

- Support teacher development in readiness and academic success strategies

Using Student Data

- Train educators to interpret and use data to tailor instruction and improve outcomes

Experiential Learning

- Enable learning through observation of best practices in real-time classroom settings
- Integrating Technology
- Professional learning on effective tech integration in instruction

School Leadership Programs

- Develop programs to grow strong instructional leaders

Supporting High-Need Student Populations

- Focus on Multilingual Learners (ML) and Students with Disabilities (SPED)

STEM Focus

- Build teacher capacity to deliver high-quality STEM instruction

Early Learning Standards

- Align instruction with early learning and developmental benchmarks

Induction & Mentoring Programs

- Develop and implement supports for new teachers and principals



School Leader Definition

Section 8101(44) of ESSA defines “school leader” as a principal, assistant principal, or other individual who is:

- A. An employee or officer of an elementary or secondary school, district, or other entity operating an elementary or secondary school; **AND**
- B. Responsible for the daily instructional leadership and managerial operations in the elementary or secondary school building.



ESEA Professional Development Requirements

Professional Development Must Be:

- **Sustained:** Ongoing, not one day or short-term
- **Intensive:** Deep, focused learning experiences
- **Collaborative:** Engages educators working together
- **Job-Embedded:** Directly connected to classroom practice
- **Data-Driven:** Informed by student and teacher data
- **Classroom-Focused:** Targets real teaching and learning needs

Travel Considerations



Professional Development - Additional Compensation

- **Supplements:** Funds received for providing services above and beyond salary; commonly used for funding mentors and paying teachers to provide professional learning
- **Stipends:** Given to certified personnel for having successfully completed PD that has occurred outside of the employee's contracted hours
- **Substitutes:** Can be funded from Title II for time teachers are out of the classroom attending a Title II funded PD



Professional Development Supplies

Title II funds can be used to purchase PD supplies that are reasonable and necessary to carry out the PD.

- MAY purchase professional learning books for a book study on a topic that aligns with the needs assessment
- MAY NOT purchase books to stock a professional learning reference library
- MAY purchase 15 graphing calculators for 15 teachers to use during PD on math content
- MAY NOT purchase a classroom set of graphing calculators for the teacher to implement the strategies learned



Professional Development - Leadership

Leadership Development for Current Leaders

- Provide professional development for principals and superintendents
- Focus on building capacity as outstanding managers and instructional leaders
- Emphasize skills in data use, staff development, school improvement, and equity

Leadership Academies for Aspiring Leaders

- Develop and support academies or pipelines for
 - Talented aspiring principals
 - Future district leaders and superintendents
- Include mentorship, field experience, and evidence-based leadership training

All leadership development must align with ESEA requirements and be part of a sustained, job-embedded, and outcomes-focused professional development plan.



May LEAs use Title II funds to support of creating curriculum, content, and materials aligned with State standards?

General Rule: No

- Title II, Part A funds are not intended for standalone curriculum development.
- The law does not list curriculum development as a specific allowable use.

Conditional Allowance: Yes, If...The activity is part of a larger professional development program that meets the definition in Section 8101(42)

- The primary purpose is professional development, not content production

Examples of Allowable Use

- Teacher working groups collaboratively develop lesson plans and assessments
 - As part of job-embedded PD focused on improving instructional practice
- Curriculum development integrated into a school improvement plan and supported by PD

Not Allowable If...

- The main goal is to produce materials or content, not build educator capacity
- The activity is not sustained, collaborative, or classroom-focused



Teacher Advancement

- Promote professional growth
 - Mentor training
 - Additional certifications (Montessori, GT, ESOL, etc.)
 - National Board
 - Advanced degrees
- Costs may include:
 - The certification application
 - Related professional development to help educators prepare, obtain as well as retain certification
 - Paid leave to work on application process



Supporting Paraprofessionals or Out of Field Teachers

Allowable Activities *(If tied to evidence-based educator development and certification)*

Coursework

- Classes required for certification or endorsement

Exam Preparation

- Study materials, prep courses, and instructional support

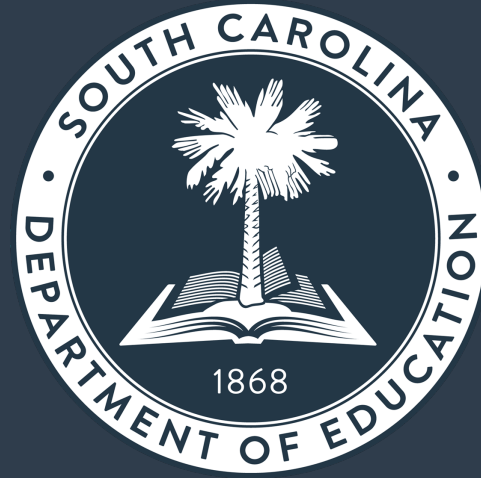
Exam Fees

- State certification or licensure tests (e.g., Praxis)

Conditions

- Activities must be part of a broader strategy to:
 - Recruit, prepare, and retain effective teachers
 - Improve instructional quality in high-need areas
 - Align with state certification requirements





Continuous Improvement

Title II, Part A Non-regulatory Guidance



Meaningful Consultation: Stakeholders

- Teachers, principals, other school leaders and paraprofessionals
- Specialized instructional support personnel
- Charter school leaders/Private school leaders (in LEAs that have these schools)
- Parents
- Community Partners
- Other organizations or partners with relevant and demonstrated expertise in programs and activities designed to meet the purpose of Title II.



Key Data Sources to Inform Title II, Part A Programs

1. Student Data

- Assessment results (achievement and growth)
- Indicators of well-being, engagement, and college/career readiness
- Class size reduction outcomes (*if applicable*)

2. Educator & Leader Data

- Recruitment and retention trends
- Educator and school leader evaluations
- IOI Reports (Inequitable distribution of effective teachers)

3. Survey & Perception Data

- School climate surveys from educators, students, and families
- Surveys on professional development needs and availability

Purpose of Data Use

- Identify needs and equity gaps
- Measure impact of Title II investments
- Refine PD strategies, staffing approaches, and leadership development
- Ensure alignment with ESSA's continuous improvement model



Allowable or Not?

Scenario:

- An LEA uses Title II funds to pay stipends for teachers attending professional development outside of their regular work hours.

Allowable? Yes

Why It's Allowable:

- The PD activity supports improved teaching quality and student achievement
- The stipend compensates educators for time spent outside of contract hours

Citation: ESEA section 2103(b)(3)(E) allows the use of Title II funds for professional development that improves teaching as well as student learning and achievement.



Allowable or Not?

Scenario:

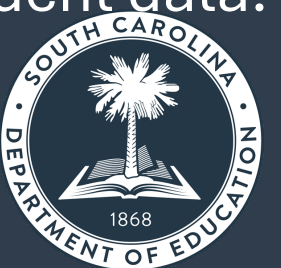
An LEA implements a district-wide professional development initiative to train teachers and school leaders on selecting and implementing formative assessments. The program includes technical assistance on designing classroom-based assessments, analyzing student performance data, and using data to adjust instruction. Additionally, the LEA provides teachers with dedicated time during the school day for collaborative data review and instructional planning.

Allowable? Yes

Why It's Allowable:

- Aligns with professional development that is:
 - Sustained, job-embedded, and data-driven
 - Focused on improving instructional practice and student outcomes
- Supports evidence-based instructional decisions
- Enhances teacher and leader capacity to use data effectively

Citation: Section 2103(b)(3)(H) allows LEAs to provide training and support to educators on using formative assessments, designing classroom assessments, and analyzing data to improve instruction, including time for teachers to review and respond to student data.



Allowable or Not?

Scenario:

- A State mandates literacy training for all K-3 teachers and asks if Title II funds can be used to cover the training costs.

Allowable? No

Why It's Not Allowable:

- Title II funds must supplement, not supplant, state or local funding
- If the training is required by the State, it is considered a basic education obligation
- Federal funds cannot be used to pay for activities that a State or LEA is already required to fund

Citation: ESEA section 2301 (supplement, not supplant) prohibits using Title II funds for State mandated activities .



Best Practices: Finishing with the Beginning in Mind

Purposes on Title II:

- Increase student achievement.
- Improve the quality and effectiveness of educators.
- Increase the number and provide greater access to qualified teachers, principals and other school leaders.

Partner Activity:

- With a partner - Discuss one or two innovative use of Title II funds to enhance professional development, recruitment and retention, or improving access to effective instruction for all students



Resources

[Title II, Part A Non-regulatory Guidance](#)

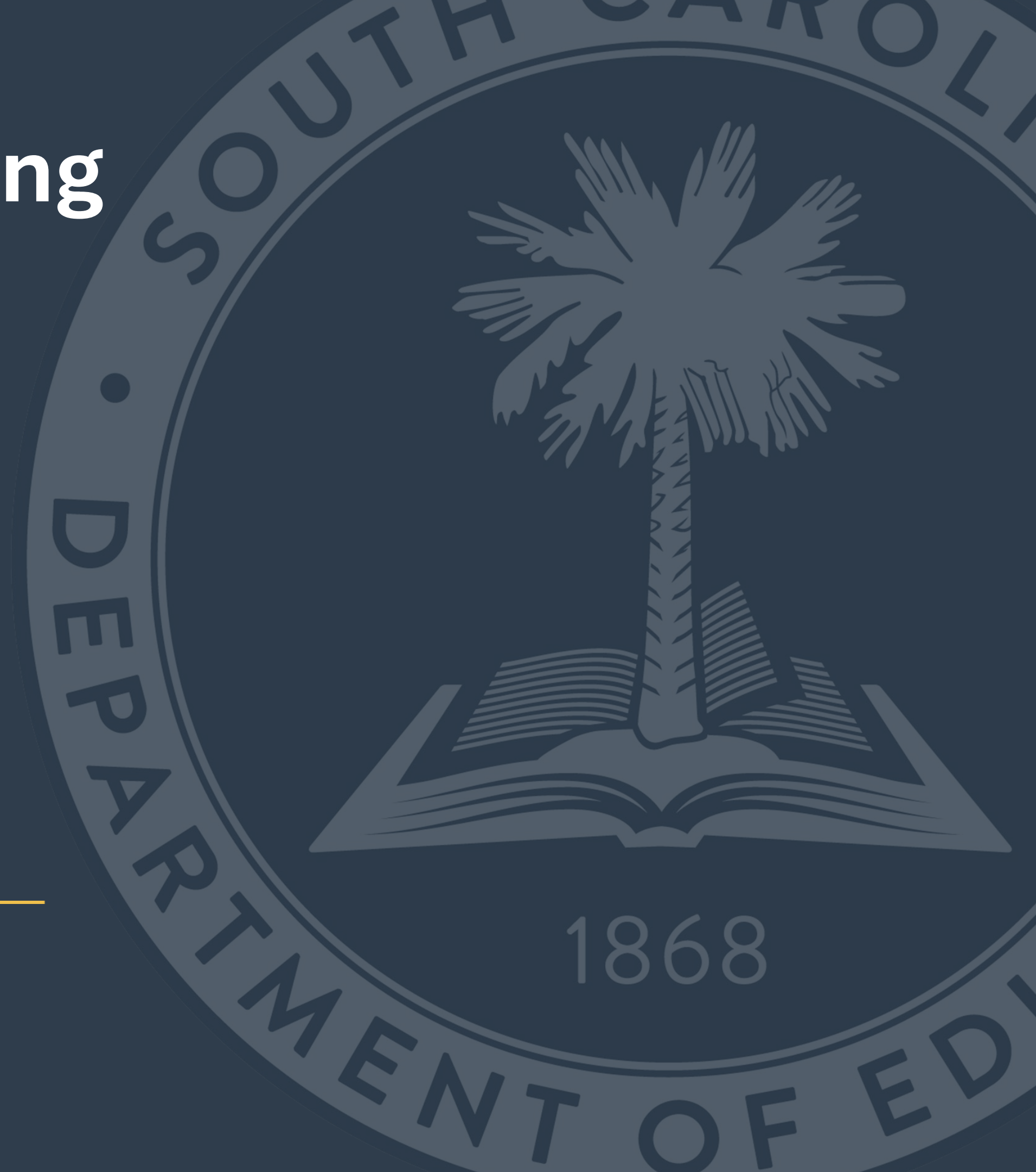
[Using Title II, Part A Funds Strategically To Support Educator Recruitment, Retention, Professional Learning , and Improved Student Outcomes Non-regulatory Guidance](#)

[Supporting a Diverse Educator Workforce to Strengthen Teaching and Learning: Non-Regulatory Guidance](#)

[State and District Uses of Title II, Part A Funds 2023-2024](#)



Title IV, Part A: Enhancing Student Support and Academic Enrichment



Overview of Title IV, Part A

- **Program Name:** Student Support and Academic Achievement
- **Authorized Under:** Every Student Succeeds Act (ESSA)
- **Purpose:** Enhance academic achievement by increasing the capacity to:
 - Provide all students with access to a well-rounded education.
 - Improve school conditions for student learning.
 - Improve the use of technology to enhance academic achievement and digital literacy.



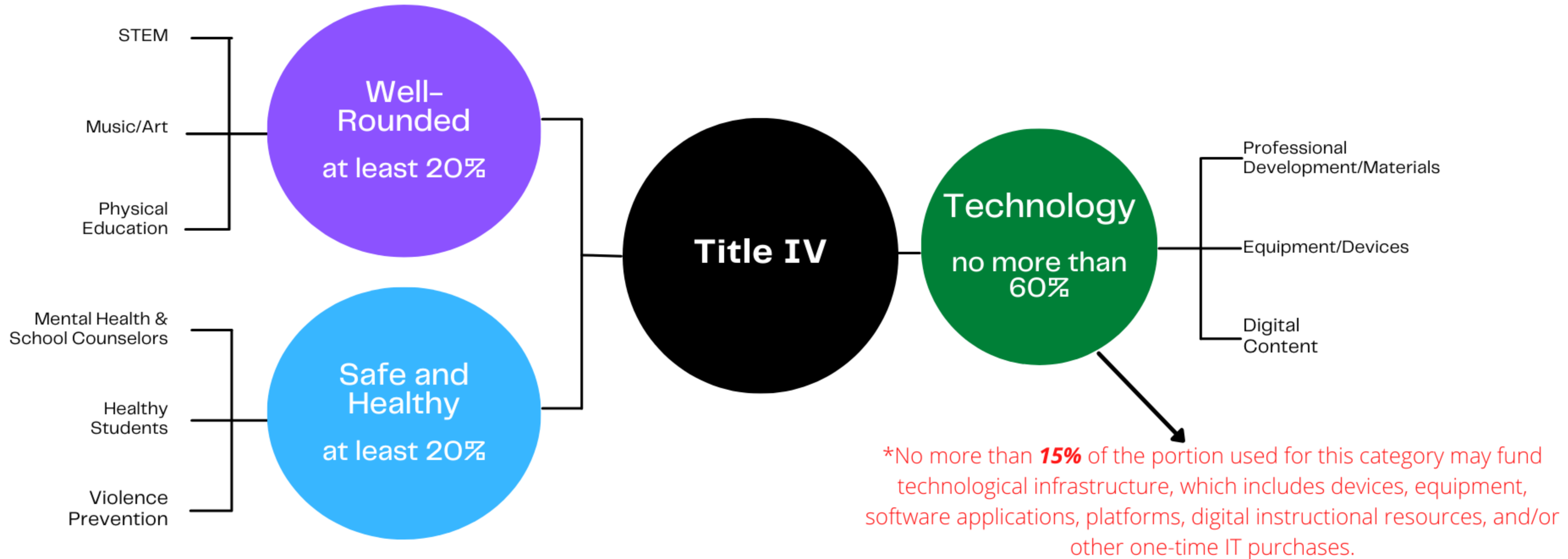
Program Components

Well-Rounded Education	Safe & Healthy Students	Effective Use of Technology
ACCESS & OPPORTUNITY A Students' Civil Right!	<i>Evidence-based activities</i>	<i>Evidence-based activities</i>
<ul style="list-style-type: none"> ➤ Arts Education ➤ Advanced Learning (AP/IB/Dual Enrollment, etc.) ➤ American History, Economics, Civics, Environmental Ed ➤ College & Career Counseling ➤ Foreign Language ➤ Gifted Education ➤ Physical Education ➤ Professional Development ➤ Social & Emotional Learning ➤ STEM / STEAM ➤ And Much More! 	<ul style="list-style-type: none"> ➤ Community Partnerships ➤ Conscious Discipline ➤ Dropout Prevention ➤ Mental Health Services and Counseling ➤ Parent and Family Engagement ➤ Professional Development ➤ PBIS and SEL programs ➤ Physical Activity/Wellness ➤ Restorative Justice 	<ul style="list-style-type: none"> ➤ PD for teachers, students, administrators to effectively <u>use</u> technology ➤ Blended Learning ➤ Flipped Classrooms ➤ Independent Study ➤ Technology Integration PD ➤ Technology Infrastructure* <p style="margin-top: 10px;">*may be subject to the 15% Special Rule</p>

Funding and Allocations

- **Allocation Formula:** Based on Title I, Part A allocations
- **Minimum funding requirements:**
 - At least 20% for Well Rounded Education
 - At least 20% for Safe and Healthy Students
 - A portion for Effective Use of Technology (no more than 15% percent of this portion on infrastructure.)

Districts or schools that receive above \$30,000 must do a needs assessment and spend:



Minimum Funding Requirements

Total Allocation: \$60,000

Well Rounded
\$15,000

Safe &
Healthy
\$20,000

The Effective Use of Technology
\$25,000

Professional
Development
\$21,250

Technology
Infrastructure
\$3,750



Planning for Title IV: Needs Assessment



Step 1: Determine activities based on identified needs



Step 2: Write high-quality objectives and outcomes

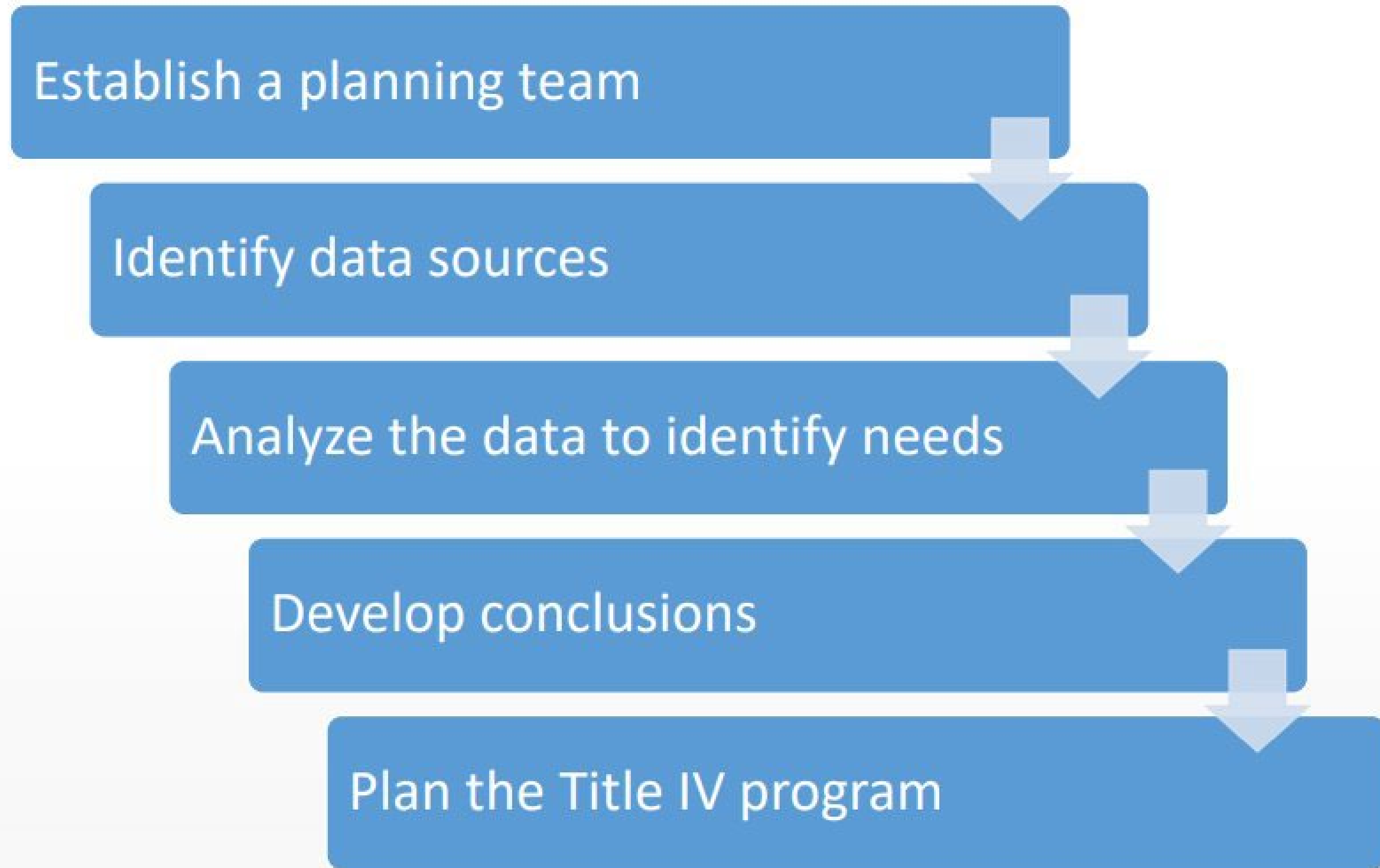


Step 3: Continuously monitor and evaluate objectives



Step 4: Publicly report outcomes

Needs Assessments



Establish a Planning Team

Who should be at the table?

1. Students
2. Parents/Families
3. Teachers and Support Staff
4. School Counselors
5. School Administrators
6. Private Schools Administrators
7. Community Stakeholders (local law enforcement, health and wellness experts, local government officials)
8. Community Organizations (afterschool providers, mental health partners, etc.)



Identify Data Sources – Well-Rounded



Track enrollment and offerings in music, art, world languages, AP/IB, STEM



Pull graduation rates, test scores, and access to advanced coursework



School climate surveys and student interest surveys



Feedback from parent nights or advisory councils

Identify Data Sources – Safe and Healthy



SIS attendance data - monitor chronic absenteeism and tardiness



PBIS and discipline dashboards - track incidents and referrals



Afterschool/summer partner participation logs – assess out-of-school support



School-based service providers – nurses, social workers, counselors – track caseloads and needs

Identify Data Sources – Effective Uses of Technology



Teacher tech integration surveys



EdTech tool usage data



Professional development attendance participation



Staff tech skills self-assessments – identify training needs by theme



Student tech literacy assessments – digital skills, safety, and citizenship



Parent digital access and literacy surveys

Analyzing Data to Identify Needs

- Review the Data Categories
- Look for patterns and trends – compare current vs. prior year data to identify increases, decreases, or consistencies
- Ask Key Questions – What is working? Where are funds most effective? Are we meeting our goals?
- Identify areas for Improvement
- Form Conclusions and Next Steps – summarize major findings
- How will outcomes be measured?
- Develop Logic Model



DATA --> PATTERNS --> INSIGHTS --> ACTION

What is a Logic Model?

A visual tool to link needs, activities, and outcomes

Helps plan, implement, and evaluate Title, IV Part A programs

Required for program improvement and compliance



Components of a Logic Model

Inputs – Resources used (funds, staff, materials)

Activities – Actions taken (trainings, purchases, etc.)

Outputs – Immediate deliverables (events held, devices bought, etc.)

Outcomes – Short, medium, and long-term changes (student access, engagement, achievement)



Logic Model Best Practices

- Keep it simple and aligned to the grant application
- Use SMART outcomes: Specific, Measurable, Achievable, Relevant, and Time-Bound
- Regularly review and update based on program evaluation



Example Logic Model

Problem Statement:

Students at a high school face high dropout rates and frequent discipline referrals. Many of these students struggle with academic performance, attendance, and behavioral issues. There is a lack of coordinated support systems and staff training to address these challenges.



Example Logic Model

Goal	Reduce dropout rates and discipline referrals by increasing student engagement, providing academic and behavioral support, and improving school climate.
Inputs – Resources used	<ul style="list-style-type: none"> - Title IV-A - School counselors, behavior interventionists - Attendance and academic tracking systems - Community mentors - PBIS training - Credit recovery resources
Activities – what you do	<ul style="list-style-type: none"> - Train staff in PBIS and restorative practices - Launch a mentorship program for at-risk students - Provide after-school tutoring and credit recovery - Conduct early warning interventions for chronic absenteeism
Outputs – What you produce. The direct results of our activities – usually countable and tangible	<ul style="list-style-type: none"> - 100% of staff trained in PBIS/restorative practices - 30 students paired with mentors - Weekly intervention team meetings held - 50 students enrolled in credit recovery/tutoring - MTSS tracking tools used consistently
Short-Term Outcomes – immediate changes/results	<ul style="list-style-type: none"> - More consistent behavioral responses from staff - Better student attendance and engagement - Fewer minor discipline incidents - Increased credit recovery completion
Long-Term Outcomes – broader changes/results	<ul style="list-style-type: none"> - Dropout rate reduced by X% in 2 years - X% decrease in discipline referrals - Improved graduation rates - Stronger student-teacher relationships
Data & Measurement	<ul style="list-style-type: none"> - Discipline referral data - Attendance records - Graduation and dropout reports - Academic progress tracking - Climate surveys - Mentor program feedback logs



Report Outcomes

- Title IV-A statute requires that **SEAs** publicly report on how funds allocated to LEAs are expended, including a summary of **LEA progress toward meeting desired objectives and outcomes**.
- Reporting on program outcomes is important not only to meet grant requirements but to demonstrate progress, provide accountability, inform decision-making, influence public perceptions, and (as applicable) complement evaluation efforts.



Title IV-A Reporting Requirement

LEA Expenditure Data Reporting Requirement

Report to SCDE on how funds are being used to meet the distribution limits across three budget categories annually. (GEMS & GAPS)

LEA Outcomes Data Reporting Requirements

Report to SCDE the degree to which it has made progress toward meeting objectives and outcomes annually.

SCDE Public Reporting Requirement

Publicly post how funds are being expended by LEAs, and the degree to which LEAS have made progress toward meeting objectives and outcomes.



GAPS Update

Expenditure - Create New

Sub Program	Function Code	Object Code
01	210 - Pupil Services	400 - Supplies and Materials
Remaining Funds	Expenditure Amount *	Fiscal Year Quarter for this Expenditure *
\$468.53	\$468.53	Select a Fiscal Quarter ▼
Document Upload		
Browse		
Comment Text *		
Select a reason ▼		
Select a reason		
Well Rounded		
Technology		
Safe and Healthy		
Other		

- LEAs input expenditure data in GAPS and sort totals by content area
- SCDE pulls expenditure data in GAPS to determine totals expended by each LEA and reviews content area totals
- SCDE creates an expenditure report to post publicly on website



Public Reporting Website

Title IV-A Public Reporting

SC Title IV-A Student Support and Academic Enrichment Grant

The purpose of this grant is to improve students' academic achievement by increasing the capacity of States, local educational agencies, schools, and local communities to— (1) provide all students with access to a well-rounded education; (2) improve school conditions for student learning; and (3) improve the use of technology in order to improve the academic achievement and digital literacy of all students.

ESSA Section 4104. State Use of Funds

- (a) IN GENERAL. —Each State that receives an allotment under section 4103 for a fiscal year shall— (2) reserve not more than 1 percent of the allotment for the administrative costs of carrying out its responsibilities under this subpart, including public reporting on how funds made available under this subpart are being expended by local educational agencies, including the degree to which the local educational agencies have made progress toward meeting the objectives and outcomes described in section 4106(e)(1)(E)

How LEAs are Using Their Title IV-A Funds

The spreadsheet below reports how funds made available under Title IV-A are being expended by local educational agencies.

- Title IV FY 2023 LEA Objectives and Outcomes Evaluation
- 2022 Title IV Public Report
- 2019-21 Budget and Expenditure Tracking

Note: The LEA allocations and spending reports listed are for the Grant Year shown on the tab.

[LINK - Title IV-A Public Reporting - South Carolina Department of Education](#)



Next Steps

- LEAs review logic models and evaluate the degree to which they have met TIV FY24 objectives and outcomes
- LEAs report progress toward meeting their objectives/outcomes using the self-reporting survey form
- SCDE reviews the LEA self-reporting survey form and responds with any questions prior to creating the public report
- SCDE creates an outcomes progress report to post publicly on the website



Survey Information

After the FY24 grant closes, you will receive a survey from the SCDE to self-report on how your District met the objectives and outcomes stated in your logic model(s).

Well Rounded Educational Opportunities Activities



Please review your **FY24** Title IV-A Well-Rounded Educational Opportunities activity evaluations and the data you collected for those evaluations. Answer the following questions about your **FY24** Title IV-A Well-Rounded Educational Opportunities activities only.

1. Please select your LEA from the drop-down list. *




Select your answer




Survey Example

4. What is the total number of Well-Rounded activities that were funded with your **FY24** Title IV-A allocation? (Please report using a numeral, ie: 0,1, 2, 3, etc.) * 


Enter your answer

5. What is the total number of objectives (outcomes) in all the activities that supported Well Rounded Educational Opportunities (WRE) in your **FY24** Title IV-A program year? (Please report using a numeral, ie: 1,2,3, etc.) If you have no Well-Rounded activities for this section, answer with a 0) * 


Enter your answer

6. Considering all the objectives (outcomes) for the **FY24** Well-Rounded activities, how many of those objectives were **never met?** (Please report using a numeral, ie: 1, 2, 3, etc. If you have no Well-Rounded activities for this question, answer with a 0) * 


Enter your answer

7. Considering all the objectives (outcomes) for the **FY24** Well-Rounded activities, how many of those objectives were **partially met?** (Please report using a numeral, ie: 1, 2, 3, etc. If you have no Well-Rounded Activities for this question, answer with a 0) * 

Enter your answer

8. Considering all the objectives (outcomes) for the **FY24** Well-Rounded activities, how many of those objectives were **substantially met?** (Please report using a numeral, ie: 1, 2, 3, etc. If you have no Well-Rounded Activities for this question, answer with a 0) * 

Enter your answer

9. Considering all the objectives (outcomes) for the **FY24** Well-Rounded activities, how many of those objectives were **completely met?** (Please report using a numeral, ie: 1, 2, 3, etc. If you have no Well-Rounded Activities for this question, answer with a 0) * 

Enter your answer

FY24 Survey:

- You will not be required to upload evaluation data.
- The last question of each section will ask you to confirm if your District has data to support your survey answers.
- Keep all Title IV evaluation data on file.

10. Does your LEA have data that supports the results you just reported for your **FY24** Well-Rounded Educational Opportunities activities? Please list the types of data measurements used. * 

Enter your answer



Pre-Survey – Questions to Consider

How is your district currently evaluating the effectiveness of your Title IV activities?

How are existing data currently organized and stored?



Post-Survey - Questions to consider

- Does the public report of your data tell the best story possible about your school or district's Title IV-A program?
- Do your data collection and evaluation plans ask and answer the appropriate questions?
- What can you do to make the data collection easier and more effective for your school or district? Do you need to adjust your timing or data-gathering strategies?
- Were the objectives specific enough to provide meaningful results and impact on students?



Title VIII, Part F – Equitable Services



Equitable Services – Title VIII, Part F

Provide all children significant opportunity to receive a fair, equitable, and high-quality education and to close educational achievement gaps

ESEA section 8501

Requires an LEA participating in a covered ESEA program, in consultation with appropriate private school officials, to provide eligible private school children and educators with services or other benefits that are equitable to those provided to eligible public-school children and educators.

Eligible private school children are children who reside in a participating Title I public school attendance area and are low achieving.



private schools

Equitable Services – Title VIII, Part F

Grant Eligibility

- All Private Schools are eligible to participate
- Private Schools must be non-profit
- Consultation same expectations as Title I, Part A
- Title VIII, Part F:
 - Title I, Part C - Education of Migratory Children
 - Title II, Part A - Supporting Effective Instruction
 - Title III, Part A - English Language Acquisition, Language Enhancement, and Academic Achievement
 - Title IV, Part A - Student Support and Academic Enrichment Grants
 - Title IV, Part B - Nita M. Lowey 21st Century Community Learning Centers (21st CCLC)
 - Title IV, Part F, section 4631 - Project SERV.



Eligibility

- Students **enrolled in private schools located in the area** served by the ESEA program are eligible to participate.
- May be restricted based on the purpose of the ESEA program (e.g., Title III, Part A).
- Where funding and resources may limit the number of children who can participate in the program, LEAs must consult with private school officials on this matter.

(ESEA sections 8501(a)(1) and 8501(b)(2))



Equitable Services – Title VIII, Part F

LEA Responsibilities

- List all available services
- Important – Set specific deadlines
- Ensure all services are secular, neutral, and non-ideological
- Ensure services go to low-achieving students at participating schools
- Ensure all services follow the purpose of the grant
- Maintain control of ALL funds, materials, equipment, and property purchased
- Maintain ongoing communication with the private schools



Equitable Services – Title VIII, Part F

LEA Responsibilities (continued)

- Identify and reach out to all private schools inside and outside of the geographic boundaries
- Verify the physical location of the school
- Invitations sent to attend the meeting
- Invitations should have indicators to ask for “Acceptance” or “Decline”
- Transfer of Federal Funds



Equitable Services – Title VIII, Part F

Determining Equitable Share Funds

EXAMPLE OF FORMULA TO DETERMINE AMOUNT FOR EQUAL EXPENDITURES BASED ON TOTAL ENROLLMENT OF CHILDREN

A. Number of Eligible Children

A1: LEA Enrollment	900
A2: Participating Private Schools' Enrollment	100
A3: Total Enrollment = A1 + A2	1,000

B. LEA program (e.g., Title II, Part A) Allocation

B1: Total LEA Allocation	\$1,000,000
B2: Administrative Costs (for public and private school programs)	\$50,000
B3: LEA Allocation Minus Admin Costs = B1 - B2	\$950,000

C. Per Pupil Rate

C1: B3 divided by A3	\$950
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D. Equitable Services

Amount LEA must reserve for equitable services for private school children and educators = A2 x C1	\$95,000
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Terms/Timelines of Grant



- Discussed during initial consultation
- Private Schools **CAN** use the funds past 1 year
- Allowed to use the entire time of the grant
- Private Schools can deny the funds after they receive their allocation
- Must be offered to all the Public and Private Schools (B-7)
- **NOTE:** Must be communicated during the consultation

Documents Requirement (New)

- All Private School documentation – Related Document section GEMS for Title II, Part A and Title IV, Part A
- Document to include:
 - Invitations with established deadlines for all private schools within the geographical boundaries (Meeting attendance)
 - Letters of Intent with established deadline (original mailing and returned responses)
 - Certified Mailing receipts with USPS stamp or receipt, returned mail, or any email communications (additional contact proof for no response received or any decline of funding).



Equitable Services – Title VIII, Part F

Resources

- Intent to Participate Letter
- Needs Assessment for Equitable Services
- Evaluation of Equitable Services
- Complaint Process Forms

- Affirmation of Consultation for Title II Part A, and Title IV Part A
 - **(Must be completed and submitted to SCDE for Participating Private Schools Only)**

- Private Schools in South Carolina - South Carolina Department of Education

United States Department of Education (USDE)

Title VIII, Part F of the Elementary and Secondary Education Act Equitable Services Non-Regulatory Guidance 2023

(PDF)





Title V - REAP



Overview of Title V – Rural Education Achievement Program (REAP)

The purpose of Title V is to address the unique needs of rural school districts that frequently lack the personnel and resources needed to compete effectively for federal competitive grants and who receive formula grant allocations in too small amounts to be effective in meeting their intended purposes.

- The grant is non-competitive and eligibility is determined by statute.
- Awards are issued annually to state education agencies (SEAs), which make sub-grants to local education agencies (LEAs) that meet eligibility requirements.
- Awards are made to all SEAs that apply and meet eligibility requirements.



Title V Programs

- Part B of Title V of the ESEA authorizes the REAP
- There are two programs authorized under REAP:
 - The Small Rural School Achievement Program (SRSA) provides funds targeted and designed for schools with small populations in lower-density areas. Funds are given directly to districts with designation by the National Center for Education Statistics (NCES).
 - The Rural and Low-Income Schools Program (RLIS) provides funds for states to subgrant to districts with NCES designation. RLIS funds apply more broadly and can be used for a number of purposes related to other titles of ESSA.
- The SCDE administers the RLIS.



Title V – Eligibility for the Rural Low-Income School (RLIS)

A local educational agency is eligible to use Title V funding if the LEA meets the following criteria:

- To be considered rural, all schools comprising the LEA must have a school locale code of 32, 33, 41, 42, or 43 (assigned by NCES), or be located in an area of the State defined as rural by a governmental agency of the State.
- To be considered low-income, 20 percent or more of the children ages five to 17 served by the LEA must be from families with incomes below the poverty line, based on data from the U.S. Census Bureau's Small Area Income and Poverty Estimates (SAIPE).



Title V: Needs Assessment and Application

- A needs assessment must be conducted and must clearly demonstrate a need in the areas in which funds are spent.
- The assessment should include stakeholders, such as teachers, administrators, other school personnel, parents, community members, and even students when feasible.
- The assessment summary narrative should include a discussion of the data indicating the need. Assessment narrative should be included in the related documents section of the online application.
- The online application should be based upon the needs assessment and allocation awarded.
- The guidance from the United States Department of Education (ED) and the South Carolina Department of Education (SCDE) should be followed when developing the plan.



Evaluation

The LEA is required to evaluate its Title V programs annually.

The evaluation must describe how Title V programs within the LEA affected student academic achievement.

The Office of Federal and State Accountability distributes this survey yearly as a data collection document.



Title V: Supplement, not Supplant

- Title V funds may be used only to supplement educational program activities provided with state and local funds.
- LEAs may not use Title V funds to pay for activities that, in the absence of these funds, would be provided with state and local funds.



Title V: Allowable Use of Funds

Grant funds awarded to local educational agencies under this subpart can be used for the any of the following:

- Activities authorized under Title I, Part A
- Activities authorized under Title II, Part A
- Activities authorized under Title III, Part A
- Activities authorized under Title IV, Part A
- Parental involvement activities



Title V: Allocation Process

1. In November each year, ED provides a SC Initial Eligibility Spreadsheet to the SCDE that must be completed by SCDE.
2. SCDE completes the spreadsheet providing district allocation information on each district using Title II and Title IV final allocations.
3. SCDE also provides the “average daily attendance” for each district.
4. SCDE provides at least two (2) contacts for each district.
5. This information is due to ED no later than December 5th.
6. ED then complies this information to determine eligibility and an estimated allocation for each district.
7. Once completed, ED provides the SCDE with a “Master Eligibility Spreadsheet” which shows allocation estimation for eligible districts.



Transferring Funds

Section 5103 of the ESEA permits an LEA to transfer funds from the following programs (source grants):

- Title II, Part A – Supporting Effective Instruction
- Title IV, Part A – Student Support and Academic Enrichment (SSAE)

Section 5103 allows an LEA to transfer local funds into any of the following programs (target grants):

- Title I, Part A – Improving Basic Programs Operated by LEAs
- Title I, Part C – Education of Migratory Children
- Title I, Part D – Neglected, Delinquent, or At Risk
- Title II, Part A – Supporting Effective Instruction
- Title III, Part A – English Language Acquisition
- Title IV, Part A – Student Support and Academic Enrichment
- Title V, Part B – Rural Education



Action Steps

- An LEA may transfer all or a portion of funds allocated under Title II, Part A and Title IV, Part A
- An LEA may transfer funds at any point during the 27-month period of availability of the grant into a grant award for the same fiscal year (e.g., a transfer from FY 2025 Title II, Part A funds into the LEA's FY 2025 Title IV, Part A funds).
- An LEA may only transfer funds into a program for which that LEA is receiving an allocation.
- When an LEA decides to transfer some, or all, of the funds allocated for local activities under the two eligible programs, it must take certain steps (continued on next slide).



Action Steps, cont'd

The LEA must:

1. Engage in timely and meaningful consultation, in accordance with section 8501 of the ESEA, with appropriate private school officials (5103(e)(2))
2. Determine the programs from which funds are to be transferred out of and into
3. Determine the amount and federal fiscal year of funds to be transferred
4. Establish the effective date for the transfer
5. Notify the SEA of each transfer at least 30 days before the effective date of the transfer (5103(d)(2)(C))
6. Submit, not later than 30 days after the date of such transfer, a copy of the LEA's modified plans or applications for all programs affected by the transfer to the SEA (5103(d)(2)(B))





Thank you for participating!

Please reach out to us if you have any questions:

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