SOUTH CAROLINA
STATE DEPARTMENT
OF EDUCATION

TITLE I RULES AND REGULATIONS HANDBOOK

2013

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Purpose of Handbook

The technical assistance documents in the Title I, Part A Handbook are intended to provide an overview of the authorizing statute and should be used in conjunction with the U.S. Department of Education (USDOE) policy guidance that may be found at http://www.ed.gov/policy/elsec/guid/edpicks.jhtml?src=ln. The following policy guidance documents are currently available. The U.S. Department of Education will place others on their website as they become available.

1. **Improving Teacher Quality Guidance** – (for Title II state grant programs) focuses on preparing, training, and recruiting high quality teachers and principals.

2. **Identifying Eligible Title I Schools and Attendance Areas** – outlines how districts identify eligible Title I schools and allocate funds to those schools.

3. **School Improvement Guidance** – provides overview of district and school improvement under Title I, Part A of the Elementary and Secondary Education Act (ESEA), as reauthorized under the No Child Left Behind Act (NCLB).

4. **Parental Involvement** – assists states, districts and schools in administering the parental involvement provisions of Title I, Part A of the ESEA.

5. **Serving Preschool Children under Title I** – provides the rationale for using Title I funds for preschool services, identifies the components of a quality program, and addresses many administrative issues.

6. **Schoolwide Programs** – provides information on effectively implementing the 10 components of a schoolwide program.

7. **Title I Paraprofessionals Guidance** – provides questions and answers on requirements for and assessment of Para educators.

8. **Title I Services to Private School Children** – addresses a district's responsibilities in making sure that eligible private school children receive equitable services under Title I, Part A of ESEA. There is also a Toolkit with sample documentation.

9. **Title I Fiscal Issues** – provides guidance on comparability, supplement versus supplant, etc.

10. **Supplemental Educational Services-** addresses a districts responsibility to offer additional academic instruction to increase the academic achievement of students in schools that did not meet State targets.

11. **Public School Choice-** addresses a districts responsibility to offer options when schools do not meet State targets for improving the achievement of all students.

The technical assistance documents in the handbook are based on the USDOE policy

guidance, non-regulatory guidance and the No Child Left Behind Act. The particular sections of the NCLB legislation are referenced in the title of each document. The NCLB legislation and the NCLB regulations are available on the USDOE website at http://www.ed.gov/about/offices/list/oese/legislation.html.

Use the technical assistance documents in the handbook, the policy guidance, the legislation, the non-regulatory guidance and the regulations in planning and implementing the many aspects of Title I, Part A to maximize services to disadvantaged children. If you have questions or want to discuss any aspect of Title I, Part A, please call the Title I program staff at (803)734-8102.

Organizing the Title I, Part A Online Application

Organizing the Title I, Part A Online Application

The LEA's Title I application will be submitted online at www.ed.sc.gov by logging in and accessing the Title I online application. For questions concerning the Title I online application, please contact your SCDE Title I project manager.

Order of Pages for Online Submission

LEA Portion of the Application

Page 1	**Cover Sheet – South Carolina Department of Education Application for Grant to Meet the Special Educational Needs of Educationally Deprived Children**
Page 2	**Eligible Attendance Areas** Completed by each LEA to list all public schools (Title I and non-Title I) and list all charter schools (Title I and non-Title I) in the LEA. Multiple copies of this page may be needed.
Page 2-A	**School Allocations/District Set-Aside – 125 Percent Minimum** Used only by LEAs serving Title I school(s) with a poverty percent that is less than 35 percent.
Page 2-B	**Allocations to Served Schools –125 Percent Minimum** Used only by LEAs serving Title I school(s) with a poverty percent that is less than 35 percent.
Page 2-C	**School Allocations/District Set-Aside – Above 35 Percent Poverty** Used only by LEAs when each school served by Title I has a poverty percent that is at or above 35 percent.
Page 2-D	**Allocations to Served Schools (Schools At or Above 35 Percent Poverty)** Used only by LEAs when each school served by Title I has a poverty percent that is at or above 35 percent. Multiple copies of this page may be needed.

Page 2-A or 2-C Addendum	**District Set-Aside Activities** The LEA will provide details of how the district set-funds will be spent based on page 2-A or 2-C.
District Set-Aside Budget Page	**District Set-Aside Budget Page** This page will populate itself based on the 2-A or 2-C Addendum page.
Page 3	**Project Budget Page** This page will populate itself based on the 2-A or 2-C Addendum page, Schoolwide Program/Technical Assistance plan(s), Targeted Assistance plan(s), and Private School plan(s). Completed by each LEA to reflect the total amount being requested on Page 1 (Cover Page), Section 1-A, Number 3.
Page 4	**District Title I Planning Team** Each LEA will provide a list of the persons required to be on the district Title I planning team.
Page 5-9	**Title I Local Educational Agency Plan** Each LEA will provide a description of how required elements of Title I, Part A, are being addressed.
Page 10	**Parental Involvement Policy for the LEA** Each LEA will insert a copy of the district's Parent Involvement Policy.
Pages 11-14	**LEA Assurances**
Pages 15-16	**Assurances – Non-Construction Programs**
Pages 17-18	**Certifications Regarding Lobbying; Debarment; and Drug-Free Workplace**
Page 19	**Certification Regarding Lobbying**
Page 20	**Certification Regarding Gun Free Schools**
Page 21	**Certification Regarding Protected Prayer in Public Education**

Page 22 **Title I Equitable Services Worksheet**

Completed only by LEAs using Title I to serve private schools. Multiple copies of this page may be needed.

Delete here and add to Specifics Regarding Completion of the LEA Portion of the Title I Application-- (Refer to the "LEA Identification and Selection of School Attendance Areas and Schools and Allocation of Title I Funds to Those Areas and Schools", Non-Regulatory Guidance, Page 17, Questions 12, 13, and 14.)

Page 23 **Summary of Professional Development**
Completed by Districts in District Improvement

The following school-level plans will follow the LEA plan, as appropriate:

- District Set-Aside Instructional Program Application(s)
- Schoolwide Program/Technical Assistance Application(s)
- Targeted Assistance Application(s)
- Support Services Activity Application(s)
- Private School Application(s)

Specifics Regarding Completion of the LEA Portion of the Title I Application

Page 1 **COVER PAGE**

Section I **Project Review and Approval**

This section completed by the SEA.

Section I-A **FUNDING**

1. Carryover – Funds remaining unspent in the FY08 project that can be expended in the FY09 project. Type this in on the online application.

On Deposit with the LEA – For the July 1st submission, the LEA will estimate this carryover amount. To determine the estimated carryover, take the difference between the total amount budgeted for FY08 and the amount of expenditures incurred for FY08. When considering expenditures incurred, be certain to include actual expenditures incurred in the project and any outstanding obligations to include fixed charges, such as salaries and benefits through the end of the project period (through June 30th or September 30th as appropriate). Cents may be included in this carryover figure. In the fall of 2008, the Office of Federal and State Accountability will distribute a final "On Deposit with the LEA" which will require an amendment. Type this in on the online application.

On Reserve with the SEA – For the July 1st submission, an LEA should use a figure (less than $1.00), which when added to the "On Deposit With The LEA" and the "New Grant Funds" makes the "Total Requested" a whole dollar amount. A final "On Reserve with the SEA" will be distributed by the Office of Federal and State Accountability in the fall of 2008. Type this in on the online application.

2. New Grant Funds – For the July 1st submission, the Office of Federal and State Accountability will distribute a preliminary allocation. Type this in on the online application. A final allocation with carryover will be distributed in the fall of 2008 and loaded into the online application and locked by the Office of Federal and State Accountability.

3. Total Requested – This is the total budget requested for the FY09 project. The total requested will equal the total on the Project Budget,

Page 3. This figure must be to the whole dollar amount.

Type this in on the online application.

Note: Number 1 and Number 2 of Section 1-A must total Number 3 of Section 1-A.

Note: When the final figures are determined in October 2008, the figures will be loaded into each districts' online application and locked.

Section II **CERTIFICATION AND STATISTICAL DATA**

Certification Date – Date on which the LEA received authorization from the district's Board of Education to file the application.

Applicant – The legal name of the LEA.

Authorized Representative – LEA representative who is authorized to request funding (the district superintendent or his/her designee) will use the district's electronic password to submit the official Title I application with an electronic signature.

Contact Person – The district person to be contacted regarding the application.

Maintenance of Fiscal Effort – Data reported for the FY08 project will be for the FY ending June 30, 2006, and the FY ending June 30, 2007. The LEA business office will be able to provide the auditor's reports for the calculation of Maintenance of Fiscal Effort. These forms are available on the Office of Federal and State Accountability website on the Title I page http://ed.sc.gov/agency/programs-services/74/MaintenanceofEffort.cfm

Source Data Used for Determining the Number of Children from Low-Income Families – Indicate the source data used to determine the number of public schools students from low-income families for the targeting of schools.

Page 2 **Eligible School Attendance Areas**

School Attendance Area – The geographic area from which a public school draws its children.

List All Public Schools (K-12) and Grade Span – All public schools must be listed, including all charter schools. (Please check to make sure that all the district's public schools, including charter schools were populated in the online application.) The grade span of each school must be indicated. Schools should be listed in rank order, starting with the

school with the highest percent of poverty. Multiple pages of Page 2 may be needed to reflect large number of schools and/or grade span groupings.

NOTE: LEAs with One Attendance Area per Grade Span (one school per grade span with no overlapping of any grade), or LEAs with an enrollment less than 1,000 students are not required to rank school attendance areas.

Enrollment (Public) – This figure is the public school's 135 day ADM (excluding four-year-olds). The 135 day ADM is taken from the LEA's official 135 Day ADM Report as submitted by the LEA's Attendance Office to the State Department of Education.

(Refer to the "LEA Identification and Selection of School Attendance Areas and Schools and Allocation of Title I Funds to Those Areas and Schools", Non-Regulatory Guidance, Pages 15–16, Question 11.)

Children from Low-Income Families (Number of Poor) – These figures indicate the number of poor students based on the source data the LEA has chosen to use (Page 1, Section II). If using free and reduced priced lunch data, the source data must be the official March Free and Reduced Lunch count from the LEA's School Food Service office. The number of private school poor students will be determined using an alternate method.

(Refer to the "LEA Identification and Selection of School Attendance Areas and Schools and Allocation of Title I Funds to Those Areas and Schools", Non-Regulatory Guidance, Pages 15–16, Question 11.)

Percent Poor – This figure (which is populated for you based on the data you provided) is the percentage of poor students, dividing the total number of K–12 poor students by totaling the school's 135 day ADM (excluding four-year-olds) and the private school poverty count. Take this figure to two decimal places.

Eligible School – Based upon the targeting method the LEA intends to use, click on to mark an "x" in this column box for each school which is eligible to receive Title I service. It is possible that a school may be eligible and not be served. Be reminded that all schools with more than 75% poverty must be served, regardless of grade span, provided funds are available.

(Refer to the "LEA Identification and Selection of School Attendance Areas and Schools and Allocation of Title I Funds to Those Areas and Schools", Non-Regulatory Guidance, Page 5, for exceptions.)

LEA Totals – The online application will add each column and record the total for each at the bottom of the page.

Targeting Method – Indicate the targeting method used to select schools.

- District Average < 35 Percent Poverty – A district may serve schools below 35 percent poverty if the district percent of poverty is also below 35 percent. The schools served must be at or above the district's percent of poverty.
- 35 Percent Rule – All schools served have a percent of poverty that is at or above 35 percent.
- Not Applicable – if the district has one school per grade span.
- Not Applicable – if the district's enrollment (K–12) is less than 1,000 students.

Page 2-A **Section I, District Set-Aside**

Completed by districts serving a school or schools with a poverty percent below 35 percent.

(REFER TO THE "LEA IDENTIFICATION AND SELECTION OF SCHOOL ATTENDANCE AREAS AND SCHOOLS AND ALLOCATION OF TITLE I FUNDS TO THOSE AREAS AND SCHOOLS", NON-REGULATORY GUIDANCE, PAGES 9–11, QUESTION 5.)

Section II, Per Pupil Cost Calculation

(Refer to the "LEA Identification and Selection of School Attendance Areas and Schools and Allocation of Title I Funds to Those Areas and Schools", Non-Regulatory Guidance, Page 6, Question 7.)

Page 2-B **Allocations to Served Schools (125 Percent Minimum)**

Completed by districts serving a school or schools with a poverty percent below 35 percent.

(Refer to the "LEA Identification and Selection of School Attendance Areas and Schools and Allocation of Title I Funds to Those Areas and Schools", Non-Regulatory Guidance, Page 6, Question 7.)

Eligible Schools and Grade Span – Check the list of schools which was

populated from Page 2 to be served in rank order by the school's percent of poverty.

Number and Percent Poor – These figures will be populated based on what you entered on Page 2.

Per Pupil Cost, Minimum, Actual, Public, and Private Allocation

(REFER TO THE "LEA IDENTIFICATION AND SELECTION OF SCHOOL ATTENDANCE AREAS AND SCHOOLS AND ALLOCATION OF TITLE I FUNDS TO THOSE AREAS AND SCHOOLS", NON-REGULATORY GUIDANCE, PAGE 6, QUESTION 7.)

Page 2-C

District Set-Aside/School Allocations – At or Above 35 Percent Poverty

Completed by districts serving schools with a poverty percent at or above 35 percent.

Section I, District Set-Aside

(Refer to the "LEA Identification and Selection of School Attendance Areas and Schools and Allocation of Title I Funds to Those Areas and Schools", Non-Regulatory Guidance, Pages 9–11, Question 5.)

Section II, Per Pupil Cost Calculation – The district has discretion in determining the per pupil amount. 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 percent. The per pupil amount must be a whole dollar amount.

(Refer to the "LEA Identification and Selection of School Attendance Areas and Schools and Allocation of Title I Funds to Those Areas and Schools", Non-Regulatory Guidance, Page 6, Question 8.)

Page 2-A or 2-C

Addendum

District Set-Aside Activities - To be submitted in the fall with change pages or an amendment following the district's receipt of the final carryover. Include all activities funded through the district's Title I district set-aside (not in school level plans). Include all positions such as administrative, instructional, support, and/or clerical positions funded by Title I. For each position include the portion of the FTE funded by Title I with the position title and a brief description of the job duties, use of funds, and budget codes for use of funds. For all activities not required by Title I, include a supplement, not supplant statement. For example, SES, N or D, and School Choice set-aside activities would not need a

supplement, not supplant statement.

Page 2-D

Allocations to Served Schools (Schools At or Above 35 Percent) Completed by districts serving schools with a poverty percent at or above 35 percent.

Eligible Schools and Grade Span – Check the list of schools which was populated from Page 2 to be served in rank order by the school's percent of poverty. (Refer to the "LEA Identification and Selection of School Attendance Areas and Schools and Allocation of Title I Funds to Those Areas and Schools", Non-Regulatory Guidance, Page 5, Question 3.)

Number and Percent Poor – These figures will be populated based on what you entered on Page 2.

Per Pupil Cost – These figures have been populated for you based on page 2.

School Allocation – The school allocation is calculated by multiplying the total number of poor students by the per pupil amount. The School Allocation for each school will equal the total of the Public Allocation added to the Private Allocation.

Public Allocation – The public allocation is calculated by multiplying the total number of poor public students by the per pupil amount.

Private Allocation – The private allocation is calculated by multiplying the total number of private students by the per pupil amount.

Addendum Budget Page

Addendum Budget Page – This page will be populated for you based on what was added to the 2-A or 2-C addendum page. You will not be able to make any changes on this page. Any changes to the budget page will only happen when the 2-A or 2-C addendum page is changed. The total for the addendum budget page will reflect the total of the district set-aside on pages 2-A or 2-C.

Page 3

Project Budget – This page will be populated for you based the addendum budget page, each Schoolwide program budget page, each Targeted Assistance budget page, and each Private School budget page. You will not be able to make any changes on this page. Any changes to the budget page will only happen when the 2-A or 2-C addendum page, the Schoolwide activity pages, the Targeted Assistance activity pages, or the Private School activity pages are changed. The project budget page must reflect the total requested figure on Page 1, Section 1-A, Number 3.

All available Title I funds, including both carryover and the new allocation amounts must be budgeted.

Page 4 **District Title I Planning Team –** List of the names of the persons that serve on the district Title I planning team. This is required.

Pages 5–9 **Title I Local Education Agency Plan** – Ensure that the responses are up-to-date for the current project year.

Page 10 **Parental Involvement Policy for the LEA –** Provide a copy of the LEA's Parental Involvement Policy.

Pages 11–21 **Assurances –** Each of the assurance pages must be completed. The LEA representative who is authorized to request funding (the district superintendent or his/her designee) will use the district's electronic password to submit the official Title I application with an electronic signature.

Page 22 **Title I Equitable Services Worksheet –** Only LEAs that are using Title I to serve private schools will complete this worksheet. Multiple copies of this page may be needed.

(Refer to the "LEA Identification and Selection of School Attendance Areas and Schools and Allocation of Title I Funds to Those Areas and Schools", Non-Regulatory Guidance, Page 17, Questions 12, 13, and 14.)

Page 23 **Summary of Professional Development –** Only LEAs identified in District Improvement will complete this page.

Eligible School Attendance Areas

Title I Non- Regulatory Guidance: http://ed.sc.gov/agency/programs-services/77/documents/LEA_Identification_and_Selection_of_Schools_Guidance.pdf

Designation of Eligible School Attendance Areas

Each Title I project submitted to the state educational agency (SEA) must annually identify the schools or school attendance areas selected for inclusion in the project using appropriate low-income measures, which have been consistently applied throughout the district.

- A district must use the same measure of poverty for:
    - Identifying eligible school attendance areas.
    - Determining the ranking of each area.
    - Determining the allocation for each area.
- The district must select a poverty measure from the following options:
    - Children ages 5-17 in poverty as counted in the most recent census data approved by the Secretary.
    - Children eligible for free and reduced-priced lunches under the Richard B. Russell National School Lunch Act.
    - Children in families receiving assistance under the State program funded under Title IV, Part A of the Social Security Act (Temporary Assistance for Needy Families).
    - Children eligible to receive medical assistance under the Medicaid program.
    - A composite of any of the above measures.
- A district must rank school attendance areas based on the percentage (not the number) of low-income children counted.

Eligible schools/school attendance areas are determined using one of two methods: 1) if the percent of children from low-income families equals or exceeds the district's percent of children from low-income families (known as District Average); or 2) if the percent of children from low-income families equals or exceeds 35 percent (known as the 35 Percent Rule).

The district must serve all schools above 75 percent poverty, regardless of grade span, before serving any school below 75 percent (see Special Ranking Rules section below for one exception to this rule). If funds remain, the district may rank the remaining eligible schools below 75 percent either district wide or by grade span. Using the same district wide average, or 35% rule, these schools should then be served in rank order, high to low. If a district has no schools/school attendance areas above 75 percent poverty, the district may rank district wide or by grade span grouping.

A district's organization of its schools defines its grade span groupings. For example, if a district has elementary schools serving all elementary grades, middle schools, and high schools, the grade span groupings would be grades K-5, 6-8, and 9-12. To the extent a district has schools that overlap grade spans (e.g., K-5, K-8, 6-8), the district should include a school in the grade span in which it is most appropriate.

Special Ranking Rules

Skipping a School

A provision of the law does allow an LEA to skip and not serve a school provided the school meets:

- the comparability requirements of Section 1120A(c) of the law (skipped schools are to be treated as Title I schools in comparability comparison calculations);
- the school is receiving supplemental funds from other State or local sources that are spent for programs that meet the requirements of schoolwide or targeted assistance programs (a skipped school must still complete and implement the components of a schoolwide or targeted assistance plan); and
- the funds expended from such other sources equal or exceed the amount that would be provided if the school was served by Title I (these "Title I replacement funds" must be in addition to the state and local resources the school would normally receive).

Grandfather Clause

An LEA may designate and serve a school attendance area or school that is no longer eligible, but was eligible and served in the preceding year, for one additional year only.

Districts with One School per Grade Span or Less Than 1,000 Students

A district with an enrollment of less than 1,000 students or with only one school per grade span is not required to rank its school attendance areas. However, if the district has a school or schools above 75 percent poverty, the district must serve the school(s) above 75 percent poverty before serving schools at or below 75 percent poverty.

Targeting Eligible Attendance Areas

Enrollment may consist of the school's 135-Day Average Daily Membership (ADM) count and any private school count of students residing in the school's attendance area (especially if the students of the private school are to be served).

Number of Poor may consist of the March count of free and reduced lunch students and any private school student count for students residing in the school's attendance area (especially if students of the private school are to be served).

Private school counts are important since dollars to private schools are based on poverty counts.

Methods of Targeting Examples

1. District Average Method

School Enrollment	# of Poor	% of Poor	School	Eligible
A	**250**	**150**	**60**	**X**
B	**541**	**180**	**33.27**	**X**
C	**298**	**30**	**10.06**	
District Totals	**1089**	**360**	**33.05**	

With the district average method, Schools A and B may be served because their percent of poor (60 percent and 33.27 percent respectively) are both greater than the district's percent of poor, 33.05 percent.

2. 35 Percent Rule

School Enrollment	# of Poor	% of Poor	School	Eligible
A	**250**	**248**	**99**	**X**
B	**541**	**530**	**98**	**X**
C	**298**	**208**	**70**	**X**
D	**400**	**150**	**38**	**X**
E	**520**	**175**	**34**	

With the 35 percent rule, Schools A, B, C, and D are eligible to be served because their percentage of poor students (99 percent, 98 percent, 70 percent and 38 percent respectively) is at least 35 percent. School E is not eligible because its percentage of poor students (34 percent) is below the 35 percent allowed under the 35 Percent Rule.

Allocating Title I Funds to Participating Schools

A district must allocate Title I funds to participating schools/school attendance areas in rank order of percent of poverty, high to low. Allocations are made on the basis of the total number of children from low-income families in each area or school. The district must allocate a higher per pupil amount to areas/schools with higher poverty rates than it allocates to areas/schools with lower poverty rates.

If a district plans to serve schools with less than 35 percent poverty, the district must allocate to each funded school at least 125 percent of the per pupil amount of funds received, based on poverty. To apply the school minimum allocation in this case, the New Title I Allocation is divided among the schools before any funds are reserved. The district must allocate this per pupil amount to each school the district serves, not just those schools below 35 percent poverty.

If a district plans to serve only schools with 35 percent or more poverty, the 125 percent criteria does not apply. However, the district must allocate funds on the basis of the total number of low-income children in each area/school by either using a per pupil allocation which it deems appropriate for each school, or applying a per pupil amount among bands of schools based on percent of poverty (see example on page 7). A district is not required to allocate the same per-child amount to each area/school. Though in all cases, the higher per-pupil amount must be applied to schools with the highest percent of poverty. To calculate school allocations, funds must first be reserved from off the top of the district's TOTAL allocation. The funds to be reserved include:

- administrative expenses which may or may not include support services depending on whether or not such nurses, social workers, etc., are considered district or school staff. Capital expenses for eligible non-public school children should also be included;
- the provision of comparable services to children in local institutions for neglected children;
- eligible homeless children who do not attend participating schools, including providing educationally-related support services to children in shelters;
- neglected and delinquent children in community day school programs; and
- other authorized activities such as preschool, summer programs, professional development, school improvement, and coordinated services.

Note: Since the reservation of funds by a district reduces the funds available for distribution to participating areas and schools, the district must consult with teachers, pupil services personnel (where appropriate), principals, and parents of children in participating schools in determining, as part of its district plan, what reservations are needed.

Special Allocation Rule

Districts are not permitted to reduce Title I allocations to schools identified for corrective action, plan to restructure and restructure by more than 15 percent from the previous year's allocation. If this allocation rule applies, served schools with a higher poverty rate may have a lower per pupil allocation than the impacted school.

Establishing Bands of Poverty for School Allocations

	% of Poverty	Per Pupil Allocation
School A	100%	$1,000
School C	98%	$1,000
School J	95%	$1,000
School B	91%	$1,000
School E	80%	$1,000
School K	75%	$800
School M	60%	$800
School D	51%	$800

All schools are to be served using the 35 percent rule. The following bands have been applied:

- All schools from School A to School E, 100% to 80%, will each receive $1,000 per child.
- All schools from School K to School D, 75% to 51%, will each receive $800 per child.

The general funding concept applies here because the highest poverty schools are receiving the highest dollar amount per pupil.

Funding Programs for Eligible Private School Children

The district must include children from low-income families who reside in the area and attend private schools when targeting schools for service and determining school allocations. It is recommended that the same poverty data be used to count private school children as is used by the district. If the private school cannot furnish such data, the district may use comparable data obtained from other sources such as a survey or scholarship applications.

Funds are allocated for children in private schools by poverty, yet service is still provided based on educational need to students residing in Title I served attendance areas. To provide equitable services to eligible private school areas, the district must reserve the amounts generated by these poor children.

Use of the funds generated must be determined in consultation with the private school officials. The two options available include:

- Providing equitable services to eligible children in each private school with the funds generated by children from low-income families who attend the private school; or

- Combining the funds generated by poor private school children in all participating areas to create a pool of funds from which the district provides equitable services to eligible private school children who are in greatest need of those services. Under this option, the services provided to eligible children in a particular private school are not dependent on the amount of funds generated by poor children in the school.

Eligible Attendance Areas

Example 1: District Average

EXAMPLE OF DETERMINING SCHOOL ALLOCATION

Targeting Method—District Average

Serving Schools Below 35 Percent (125 Percent Rule)

1. The Congaree School District's new fiscal year allocation is $987,654. Since the district in this example is serving schools below 35 percent, the 125 percent per pupil cost calculation must be applied. However, set-asides are not taken off the top until school minimums are calculated using the New Title I Allocation.

2. Divide the district's new allocation ($987,654) by the district's total poverty count of students (689) to obtain a per pupil cost equity factor based on poverty ($1,433).

    - The per pupil cost ($1,433) is then multiplied by 125 percent (or 1.25) to yield the 125 percent per pupil cost calculation as required by law ($1,791). A district must allocate at least this amount for each low-income child in every school the district serves, not just for those schools below 35 percent poverty.

3. List schools in rank order of percent poverty, high to low, indicating each school's enrollment and low-income count including private school counts. Calculations are made as follows:

    a. The percent of poor was determined by dividing the total number of poor by the Enrollment. Mark each school that is **eligible** for service based on the targeting method selected. (District Percent or 35 Percent Rule) In this example, since we are serving schools below 35 percent but schools at or above the district average, district average is the targeting method.

    b. The **minimum** school/attendance area allocation is determined by multiplying the 125 percent per pupil cost of $1,791 by the total number of poor, for example, Andrew Jackson Academy- $1,791 X 200 = $358,200. A running total of all costs is advised to allow districts to determine how many of the eligible schools can be served with the funds available to the district.

c. Based on the actual allocation to the school, the school funds must be **equitably** distributed among the public and private school students based on the low-income counts. The total funding for each school should be recorded in the appropriate columns, allocation generated by public school poor children and allocation generated by private school poor children.

d. The total amount of Title I funds allocated to the schools in the Congaree School District totals $680,580. The amount of funds allocated to the schools was determined before funds were reserved as set asides.

SCHOOL ALLOCATIONS – 125% minimum

I. Adjusted Title I Allocation (For 125%, this section is completed last.)		**II. Per Pupil Calculation**
New Title I LEA Allocation	$987,654	
Carryover	$98,765	
Total Title I Allocation	$1,086,419	
Less Set-Asides (As applicable)		*If schools below 35% poverty are to be served – (125% Required):*
LEA Administration	$79,667	
Parent Involvement (1% Minimum)	$9,877	
($9,384 to schools)*		*$987,654 ÷ 689 = $1,433*
(95% of 1% must go to schools)		*Total LEA Allocation Total # of low-income children in the district $ Per Poor Student*
Homeless/Neglected/Delinquent	$20,000	*$1,433 x 125% = $1,791*
		Per Pupil Poverty Cost ***Minimum Per Pupil Cost***
If School Improvement:		
Transportation for choice (5-15%)	$98,765	
Supplemental Services (5-15%)	$98,765	
LEA Improvement (10%)	$98,765	
Professional Development (5%)		
($49,383 from Title II funds)		** $390 has been reserved from the parental involvement set-aside for equitable services to parents of private school children.*
TOTAL SET-ASIDES	$405,839	

Eligible Attendance Areas **Example 1: District Average**

DISTRICT: Congaree School District

List All Public Schools (K-12)	Enrollment (Public & Private)	Children from Low-Income Families (No. Poor)			Percent Poor	Eligible School (Mark X)
		Public	Private	Total		
Andrew Jackson Academy (K-8)	450	200	0	200	44.44	X
Captain Smith Elem (K-5)	400	90	10	100	25.00	X
Palmetto Charter School (K-5)	350	75	5	80	22.85	X
Washington MS (6-8)	500	90	0	90	18.00	
Saluda River HS (9-12)	1000	160	10	170	17.00	
Swamp Fox Military Academy (6-12)	75	10	0	10	13.33	
Lafayette Elem (K-5)	140	17	0	17	12.14	
ML King Elem (K-5)	220	22	0	22	10.00	
LEA TOTALS:	3,135	664	25	689	21.97	

Indicate Targeting Method: ____ 35% Rule __X___ District Average <35% Poverty

_____ N/A One School Per Grade Span _____ N/A Less than 1,000 students

II. Allocation to Eligible Schools

(125% Minimum)

a. Districts serving schools below 35% poverty:

Eligible Schools (K-12)	**No. Poor**			**Percent Poor**	**Per Pupil Cost**	**Minimum Allocation**	**Actual Allocation**	**Public Allocation**	**Private Allocation**
	Public Poor	**Private Poor**	**Total Poor**						
Andrew Jackson Academy(K-8)	200	0	200	44.44	1,791	$358,200	$358,200	358,200	0
Capt. Smith Elem (K-5)	90	10	100	25.00	1,791	$179,100	$179,100	161,190	17,910
Palmetto Charter School (K-5)	75	5	80	22.85	1,791	$143,280	$143,280	134,325	8955
LEA Totals	365	15	380				$680,580	$653,715	$26,865

EXAMPLE OF DETERMINING SCHOOL ALLOCATION

Targeting Method—35 Percent Rule

Serving Schools at or above 35 Percent

1. The Jefferson School District has received a new fiscal year allocation of $2,476. The district has $150,000 in carryover funds from the previous year. $1,106,450 has been reserved for neglected, homeless, parent involvement, administration costs, choice, supplemental services, summer school, professional development for teachers not yet highly qualified and district improvement.

2. Low-income private school students living in served attendance areas make up 2.34 percent of the low-income student population in participating attendance areas (50 / 2135 = .0234). As required under §200.65 of the Title I Regulations, a district calculates these equitable services from the set-asides in the proportion to the number of private school children from low-income families residing in participating public school attendance areas (refer to private school section of manual for specific instructions and examples). Multiply 2.34 percent (.0234) by the set-aside amount for parent involvement ($75,760) and summer school ($150,000). The amounts of $1,772 for parent involvement and $3,510 for summer school is to be set-aside by the district for services to parents of private school children receiving Title I services and for a summer school program or other educational services determined through consultation with private school officials.

3. These set-aside costs are subtracted from the district's total allocation.

4. Since the district in this example is **NOT serving schools below 35 percent**, a 125 percent per pupil cost calculation is not required. However, a per pupil cost must be applied. In this example, the district opted to allocate $800 per poverty child to the school at 100 percent poverty, and $700 per poverty child for the schools between 60 and 70 percent poverty, and $600 per poverty child to the school at 37 percent poverty.

5. List schools in rank order, high to low, by percent of poverty with each school's enrollment and poor count including private school counts. Calculations are made as follows:

a. The percent of poor was determined by dividing the number of poor by the enrollment. Mark each school that is eligible for service based on the targeting method selected (district average or 35 percent rule). In this example, all school at or above 35 percent are served, so 35 percent rule is the targeting method.

b. The school attendance/attendance area allocation is determined by multiplying the per pupil cost ($800, $700 or $600) by the number of poor for each school, for example, Morgan Elementary - $700 X 695 + $486,500. A running total of the costs is advised to allow the LEA to determine how many of the eligible schools can be served with the funds available to the district.

c. Based on the actual allocation to the school, the funds must be equitably distributed among the public and private school students based on the low-income counts. The total funding for each should be recorded in the appropriate columns.

NOTE: The schools can be funded in bands provided a higher poverty school does not receive a lower per pupil cost than a lower poverty school.

Schools at or Above 35% Poverty

Jefferson School District

I. Adjusted Title I Allocation	**II. Per Pupil Cost Calculation**
New Title I LEA Allocation $2,476,000	b. If all schools to be served are above 35% poverty: (Explain process to be used and show figures as to how per pupil will be applied: LEA Total less set asides divided by poor in eligible schools; LEA chosen per pupil amount; poverty bands, etc.)
Carryover $150,000	
Total Title I Amount $2,626,000	100% $800 60%-70% $700 35%-40% $600
Less Set-Asides (As applicable)	
Parent Involvement (1% Minimum) $75,760 ($21,839 to schools) **(95% of the 1% must go to the school)**	
Homeless/Neglected/Delinquent $75,311	
If School Improvement:	
Transportation for choice (5-15%) $123,800 (5%)	
Supplemental Services (5-15%) $371,400 (15%)	
Other-List *Professional Development ($5,800 from Title II)	* The district has only one teacher and 2 paraprofessionals that are not yet highly qualified. $5,800 is the amount necessary for the teachers and paraprofessionals' to become highly qualified.
Summer School $150,000	Equitable Services for Private School(s) [50 / 2135 = 2.34%]
District Improvement $150,357 ($97,243 from schools)	Parent Involvement: 2.34% x $75,760 = $1,772 Summer School: 2.34% x $150,000 = $3,510
TOTAL SET-ASIDES $1,106,450	
Amount to be distributed to schools (Not Applicable if 125% minimum required) $1,519,550	

Eligible Attendance Areas **Example 2: 35% Rule**

DISTRICT: Jefferson School District

List All Public Schools (K-12)	Enrollment (Public & Private)	Children from Low-Income Families (No. Poor)			Percent Poor	Eligible School (Mark X)
		Public	Private	Total		
Jefferson Elem (K-5)	**870**	**850**	**20**	**870**	**100.00**	**X**
Morgan Elem (K-5)	**951**	**671**	**24**	**695**	**73.08**	**X**
Smith-Barney Academy (K-5)	**696**	**444**	**0**	**444**	**63.79**	**X**
Anderson Primary (K-2)	**340**	**120**	**6**	**126**	**37.05**	**X**
Lindsey MS/HS (6-12)	**874**	**299**	**2**	**301**	**34.44**	
Riley Charter (K-12)	**300**	**28**	**0**	**28**	**9.33**	
LEA TOTALS:	**4,031**	**2,412**	**52**	**2,464**	**61.12%**	

Indicate Targeting Method: __X__ 35% Rule _____ District Average <35% Poverty

_____ N/A One School Per Grade Span _____ N/A Less than 1,000 students

Eligible Attendance Areas **Example 2: 35% Rule**

DISTRICT: Jefferson School District

III. Allocation to Eligible Schools (Schools Above 35% Poverty)								
Eligible Schools	No. Poor			Percent Poor	Per Pupil Cost	School Allocation (Total Poor x Per Pupil)	Public Allocation	Private Allocation
	Public Poor	Private Poor	Total Poor					
Jefferson Elem (K-5)	**850**	**20**	**870**	**100.00**	**$800**	**$696,000**	**$680,000**	**$16,000**
Morgan Elem (K-5)	**671**	**24**	**695**	**64.67**	**$700**	**$485,500**	**$469,700**	**$16,800**
Smith-Barney Academy (K-5)	**444**	**0**	**444**	**63.79**	**$700**	**$310,800**	**$310,800**	**$0**
Anderson Primary (K-2)	**120**	**6**	**126**	**37.05**	**$600**	**$75,600**	**$72,000**	**$3,600**
LEA Totals	**2085**	**50**	**2135**			**$1,568,900**	**$1,532,500**	**$36,400**

EXAMPLE OF DETERMINING SCHOOL ALLOCATION

Targeting Method—One School per Grade Span

1. The Carolina #1 School District has received a new allocation of $1,400,000 and has $100,000 in carryover funds. The amount of $450,000 has been reserved for services to homeless, neglected and delinquent children, parent involvement, administration, school choice, supplemental services, and professional development.

2. These set-aside costs are subtracted from the district's total allocation.

3. Since the district in this example is **NOT serving schools below 35 percent**, a 125 percent per pupil cost calculation is not required. The district has only one school per grade span and does not need to rank schools, unless the district has schools above 75 percent poverty. In this example, the district has two schools above 75 percent poverty. The district must rank and serve the schools above 75 percent poverty first, and then may choose to serve any, all or no schools at or below 75 percent poverty.

4. List schools in rank order, high to low, by percent poverty with each school's enrollment and low-income count including the private school counts. Calculations are made as follows:

   a. The percent of poor was determined by dividing the total number of poor by the enrollment for each school. A mark should be placed beside each school that is **eligible** for service based on the targeting method selected.

   b. The school allocation is determined by multiplying the per pupil cost for each school's band by the number of poor, for example, Doolittle - $1,200 X 300. A running total of the costs is advised to allow the district to determine how many of the eligible schools can be served with the funds available to the district.

   c. The district served the two schools above 75 percent poverty and had enough remaining funds to serve Nathaniel Greene Middle School, the lowest ranked school. A district with one school per grade span or with an enrollment of less than 1,000 students is not required to allocate funds to schools in rank order to schools at or below 75 percent poverty.

Schools At or Above 35% Poverty

Carolina #1 School District

I. Adjusted Title I Allocation		**II. Per Pupil Cost Calculation**
New Title I LEA Allocation	$1,400,000	**b. If all schools to be served are above 35% poverty: (Explain process to be used and show figures as to how per pupil will be applied: LEA Total less set asides divided by poor in eligible schools; LEA chosen per pupil amount; poverty bands, etc.)**
Carryover	$100,000	
Total Title I Funds	$1,500,000	**Poverty Bands: 90-100% -- $1,200 per child** **60-90% -- $1,000 per child**
Less Set-Asides (As applicable)		
LEA Administration	$50,000	
Parent Involvement (1% Minimum) ($14,250 to schools) **(95% of the 1% must go to the school)**	$55,000	**Parent Involvement: $4,750 for each school**
Homeless/Neglected/Delinquent	$45,000	
Supplemental Services (5-15%)	$280,000	
Other-List *Staff Development	$20,000	*** This set-aside is for staff development unrelated to the 5% requirement for highly qualified teachers and parapros.**
TOTAL SET-ASIDES	$450,000	
Amount to be distributed to schools		
(Not Applicable if 125% minimum required)	$1,050,000	

DISTRICT: Carolina #1

List All Public	Enrollment	Children from Low-Income Families (No. Poor)			Percent	Eligible
Schools (K-12)	(Public & Private)	Public	Private	Total	Poor	School (Mark X)
Doolittle Primary (K-2)	**300**	**300**	**0**	**300**	**100.00**	**X**
Five Points Elem (3-5)	**350**	**325**	**0**	**325**	**92.85**	**X**
Ellington H.S. (9-12)	**275**	**200**	**0**	**200**	**72.72**	**X**
Nathaniel Greene MS (6-8)	**450**	**300**	**0**	**300**	**66.66**	**X**
LEA TOTALS:	1,375	1,125	0	1,125	81.81%	

Indicate Targeting Method: ____ 35% Rule _____ District Average <35% Poverty

__X__ N/A One School Per Grade Span _____ N/A Less than 1,000 students

District: Carolina #1

IV. Allocation to Eligible Schools (Schools Above 35% Poverty)								
Eligible Schools	No. Poor			Percent Poor	Per Pupil Cost	School Allocation (Total Poor x Per Pupil)	Public Allocation	Private Allocation
	Public Poor	Private Poor	Total Poor					
Doolittle Elem (K-5)	300	0	300	100.00	$1,200	$360,000	$360,000	$0
Five Points Elem (3-5)	325	0	325	92.85	$1,200	$390,000	$390,000	$0
Nathaniel Greene MS (6-8)	300	0	300	66.66	$1,000	$300,000	$300,000	$0
LEA Totals	925	0	925			$1,050,000	$1,050,000	$0

Comparability

Title I Non-Regulatory Guidance: http://ed.sc.gov/agency/programs-services/77/documents/Fiscal_Guidance.pdf

Comparability

Comparability is a **test of fairness**. Schools receiving federal Title I funds must receive state and local funds **comparable** to the state and local funds given to non-Title I schools. In other words, Title I schools must be getting their fair share of state and local funds before they receive Title I funds. Title I funds, by law, are therefore **supplemental** to state and local funds. Skipped schools must be treated as Title I schools in the comparability test.

Requirement to be comparable

Comparability is **required** by the **No Child Left Behind Act of 2001** (Public Law 107-110, enacted on January 8, 2002), **Section 1120A, Fiscal Requirements, paragraph c.** The section reads as follows:

(c) COMPARABILITY OF SERVICES-

(1) IN GENERAL-

(A) COMPARABLE SERVICES- Except as provided in paragraphs (4) and (5), a local educational agency may receive funds under this part only if State and local funds will be used in schools served under this part to provide services that, taken as a whole, are at least comparable to services in schools that are not receiving funds under this part.

(B) SUBSTANTIALLY COMPARABLE SERVICES- If the local educational agency is serving all of such agency's schools under this part, such agency may receive funds under this part only if such agency will use State and local funds to provide services that, taken as a whole, are substantially comparable in each school.

(C) BASIS- A local educational agency may meet the requirements of subparagraphs (A) and (B) on a grade-span by grade-span basis or a school-by-school basis.

(2) WRITTEN ASSURANCE-

(A) EQUIVALENCE- A local educational agency shall be considered to have met the requirements of paragraph (1) if such agency has filed with the State educational agency a written assurance that such agency has established and implemented--

(i) a local educational agency-wide salary schedule;

(ii) a policy to ensure equivalence among schools in teachers, administrators, and other staff; and

(iii) a policy to ensure equivalence among schools in the provision of curriculum materials and instructional supplies.

(B) DETERMINATIONS- For the purpose of this subsection, in the determination of expenditures per pupil from State and local funds, or instructional salaries per pupil from State and local funds, staff salary differentials for years of employment shall not be included in such determinations.

(C) EXCLUSIONS- A local educational agency need not include unpredictable changes in student enrollment or personnel assignments that occur after the beginning of a school year in determining comparability of services under this subsection.

(3) PROCEDURES AND RECORDS- Each local educational agency assisted under this part shall--

(A) develop procedures for compliance with this subsection; and

(B) maintain records that are updated biennially documenting such agency's compliance with this subsection.

(4) INAPPLICABILITY- This subsection shall not apply to a local educational agency that does not have more than one building for each grade span.

(5) COMPLIANCE- For the purpose of determining compliance with paragraph (1), a local educational agency may exclude State and local funds expended for--

(A) language instruction educational programs; and

(B) the excess costs of providing services to children with disabilities as determined by the local educational agency.

Exemptions from comparability

The requirement to prove comparability does not apply to districts which have only **one school building per grade span**. [see section 1120A(c)(4) above]. Also, if a school district has only two schools, one large and one small, comparability is not required. Charter schools are to be treated as any other school and should be included in comparability testing. Finally, a school district **may** exclude schools (including charter schools) with **100** or fewer students from its comparability test.

Frequency for comparability testing

Comparability must be tested **every year** in which a district receives Title I funds.

Timeframe (THIS IS IMPORTANT)

Comparability testing should be completed at the district level by **November 15**. This will give a district time to fix any comparability issues before the second half of the school year. A district should have corrected any comparability issues no later than **January 15**.

Federally mandated criteria for meeting comparability

There are a number of ways a district can meet the comparability requirement as required by the Federal Department of Education (USED). One is to establish and implement the following:

- a district-wide salary schedule;
- a district policy to ensure equivalence among schools in teachers, administrators and other staff; and
- a district policy to ensure equivalence among schools in the provision of curriculum materials and instructional supplies [see section 1120A(c)(2)(A) above]

The above 3 criteria **are included** in the local educational association (LEA) assurances section (**assurance number 27**) of the South Carolina Title I application which is signed by each district superintendent. **Each district is committing to these criteria for comparability by submitting its Title I application**.

Additionally, a district may meet the comparability requirement if it tests for comparability using a number of measures that the USED recommends.

Because the South Carolina Department of Education (SCDE) is ultimately responsible in the eyes of the USED for ensuring that districts are comparable, the SCDE may establish the method a district uses to determine comparability. **In South Carolina, the SCDE has established that a district must meet the comparability requirement 1) by assuring that the above three criteria are fully implemented and 2) by using the *student/instructional staff ratio method*.**

Method to compute comparability

The USED has formulated a number of assurances and tests for comparability. The USED allows State Departments of Education to require a primary method in their state to test for comparability. In South Carolina, the primary test of comparability is, as stated above, the **student/instructional staff ratio**.

Alternative methods

If a district cannot prove comparability using the student/instructional staff ratio, they have three alternatives:

a. Adjust the funding source(s) used to pay the instructional staff,

b. Move instructional staff from one school to another for all or part of the day, or

c. Use a different method to test for comparability (**contact the SCDE in this case for assistance**).

Procedure for using the student/instructional staff ratio test

a. Students and instructional staff **must** be counted **on the same day**.

b. Title I schools are compared to non-Title I schools. In the case of a district having only Title I schools, the least poor Title I school(s) are compared to the poorer Title I schools.

c. Schools are compared by grade span (usually elementary, middle and high schools).

d. Only those grade spans that have Title I served schools have to be compared.

e. Students are counted at each school using the district Average Daily Membership (**ADM**). **Do not count** 3 and/or 4 year olds.

f. Instructional staff can be counted in a number of ways. Most districts use payroll or finance data. Staff is counted as full (1.0) or fractional (less than 1.0) Full Time Equivalents (FTE). **Include** and **exclude** the following staff in the count:

Include:

- Classroom teachers, music, art and PE teachers, and foreign language instructors
- Computer lab instructors (not monitors)
- Instructional coaches
- Curriculum coordinators
- Principals
- Assistant principals
- Instructional paraprofessionals - must work under the supervision of a highly qualified teacher (**count instructional paraprofessionals at 50% of their allowable FTE**)
- Media specialist
- Guidance or career counselor
- Speech therapist

Exclude:

- Custodians or housekeepers
- Food service personnel
- Secretaries (all)
- SASI clerk (PowerSchool clerk)
- Attendance clerk
- Data entry clerk
- Nurses
- Social workers
- Psychologist

- Any federally paid personnel (See information below in reference to State Fiscal Stabilization Funds.)
- Pre-K teachers or paraprofessionals

g. Staff data should include: (Please note that Social Security numbers and salary are **not** needed.)

- Name of included personnel
- Name of school where employed
- FTE (fractional if person is paid part time out of an excluded account and part time out of an included account or is a part time employee)
- Funding source
- Position description
- Date on which the report counted the personnel
- Personnel who are excluded (crossed out or otherwise highlighted for verification)

h. The source data used for student count (ADM) and instructional staff count must be verifiable

i. A K-8 school (or similar large grade span school) may be counted as one K-5 and one 6-8 school.

j. A K-2, 3-5 or similar small grade span could be excluded from comparability if there is only one such school in the district.

Procedure if school personnel are paid with State Fiscal Stabilization Funds under the American Recovery and Reinvestment Act of 2009

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In light of the wide variety of activities for which State Fiscal Stabilization Funds may be used, the determination of whether they are treated as federal funds or state or local funds for purposes of comparability determinations should be made in consideration of the particular activity for which the funds are being used. Under section 14003(a) of the American Recovery and Reinvestment Act of 2009

(ARRA), State Fiscal Stabilization Funds may be used for any activity that is authorized by the ESEA, the Individuals with Disabilities Education Act (IDEA), the Adult and Family Literacy Act, or the Carl D. Perkins Career and Technical Education Act of 2006, among other certain specified activities.

In addition, the activities authorized by the ESEA include Title VIII of the ESEA, the Impact Aid Program. Because Impact Aid is considered general aid to recipient LEAs, Impact Aid funds may be used for any educational activity consistent with local and State requirements. As such, Impact Aid funds are effectively deemed state and local funds for which no accountability to the federal government is required, and staff that are paid with Impact Aid funds are included in comparability determinations.

Accordingly, if school personnel are paid with State Fiscal Stabilization Funds on the basis that the funds are being used for activities that are authorized by Impact Aid (*i.e.*, the funds are being used to pay school personnel who would ordinarily be supported with state or local funds in the absence of the current economic conditions), then the school personnel should be considered to be paid with state or local funds and should be included in comparability determinations.

If, however, school personnel are paid with State Fiscal Stabilization Funds for activities that are authorized by one of the other federal programs set forth above (*e.g.*, in the absence of the State Fiscal Stabilization Funds, the staff member would otherwise be paid with IDEA funds), then the individual paid with those funds should be considered to be federally funded and should not be included in comparability determinations.

An LEA must include in the comparability paperwork an explanation of how it treats staff paid with State Fiscal Stabilization Funds in the comparability test.

REMEMBER:

Comparability must be done for **each year** a district receives Title I funds (unless the district is excluded from the comparability requirement).

Comparability testing should be completed at the district level by **November 15**. This will give a district time to fix any comparability issues before the second half of the school year. A district should have corrected any comparability issues no later than **January 15**.

If a district cannot prove comparability using the student/instructional staff ratio they have **three alternatives**:

a. Adjust the funding source(s) used to pay the instructional staff,

b. Move instructional staff from one school to another for all or part of the day, or

c. Use a different method to test for comparability (contact the SCDE in this case for assistance).

Sample form to compute comparability

The following form may be used to compute comparability. If a district does not use this form and uses their own form or spreadsheet, it should include the same information and calculations.

The example below assumes a district serves only elementary grades and has Title I and non-Title I schools. If a district serves other or all grade spans, then a form for each grade span is required.

If a district has **only** Title I schools in any of its grade spans, then the least poor Title I school(s) are used as the comparison school(s). In effect, they act as non-title I schools for this purpose.

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	55	14.6	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 *				14.1	

The ratio 14.1 is your **target ratio**. In order to be comparable, the student/instructional staff ratio for each Title I elementary school may not exceed 14.1 (14.1 students:1 teacher).

Form to compute comparability

The following is a blank form which a district may use to compute comparability.

School	Grade Span	Student Enrollment	FTE Instructional Staff	Student/ Instructional Staff Ratio	Comparable?
Title I Schools					
Non-Title I Schools [or Title I school(s) to be used as comparison school(s)]					
110% of Student/FTE ratio for non-Title I schools					

Maintenance of Effort

Title I Non-Regulatory Guidance: C:\Users\JStanley\Desktop\Rules and Regs 2013\Title I Guidance\Fiscal Issues Guidance 2008.doc http://ed.sc.gov/agency/programs-services/77/documents/Fiscal_Guidance.pdf

Maintenance of Effort

An LEA may receive its full allocation of Title I, Part A funds for any fiscal year only if the state educational agency (SEA) determines that the LEA has maintained its fiscal effort in accordance with Section 9521 of ESEA.

Definition

Maintenance of effort (MOE) is a fiscal calculation for two consecutive years to demonstrate that school district expenditures from state and local funds meet or exceed the required amount necessary for Title I funding. The procedure ensures that Title I, Part A (federal) funds are used by the district to provide educational services that are additional to the regular services provided through local and state funds.

Source Documentation

As documentation of the district's maintenance of fiscal effort, a worksheet must be completed for each of the two years in the comparison. The school district's annual Audit report, normally housed in the school district's business office, is the source data. The sum of the calculated MOE for each of the two comparison years (preceding and second preceding) must be noted on page one of the school district's application for Title I funds. **There is also a requirement that a report be generated from the district's accounting software that will summarize, for the two fiscal years, capital outlay expenditures. This report will be used as supporting documentation along with the district's MOE worksheet.**

Web access

- Requirements for MOE Calculation
- MOE Electronic Worksheet Sample
- MOE Calculation Electronic Form

Requirement

Section 9521 provides that an LEA may receive funds under Title I, Part A for any fiscal year only if the SEA finds that either the combined fiscal effort per student or the aggregate expenditures of the LEA and the state with respect to the provision of free public education by the LEA for the preceding fiscal year were not less than 90 percent of the combined fiscal effort or aggregate expenditures for the second preceding fiscal year.

Example

Districts will meet MOE for 2012–13 if the 2010–11 state/local effort equals at least 90 percent of the 2009–10 state/local effort.

The LEA must maintain fiscal effort in the same manner as it does for Title I, Part A to receive Title I ARRA funds.

Failure to Meet the Requirement

If an LEA fails to meet the MOE requirement, the SEA must reduce the amount of funds allocated under the programs covered by the MOE requirement in any fiscal year in the exact proportion by which the LEA fails to maintain effort by falling below 90 percent of either the combined fiscal effort per student or aggregate expenditures through which method is most favorable to the LEA.

Expenditures to be included in the MOE Calculation

The SEA considers the LEA's state and local fund expenditures including those for administration, instruction, attendance and health services, pupil transportation services, operation and maintenance of facilities, fixed charges, food service and pupil services.

Expenditures to be excluded in the MOE Calculation

Expenditures for community services, capital outlay, debt service or supplemental expenses made as a result of a presidentially declared disaster are not to be included in the determination. Any expenditures made from funds provided by the federal government are to be excluded.

Note: *Expenditures related to Title I ARRA are treated as federal funds and are excluded for the MOE calculations.*

Preceding fiscal year

The preceding fiscal year is the federal fiscal year, or the 12-month fiscal period most commonly used in a state for official reporting purposes, prior to the beginning of the federal fiscal year in which funds are available.

LEA fiscal requirements

Three fiscal requirements related to the expenditure of regular state and local funds must be met by the LEA. An LEA must:

1. Maintain state and local effort;
2. Provide services in project areas with state and local funds that are at least comparable to services provided in areas not receiving Part A services; and
3. Use Part A funds to supplement, not supplant regular non-federal funds.

Waiver

The Secretary may waive the MOE requirement in the cases of:

- Exceptional or uncontrollable circumstances such as a natural disaster; or
- A precipitous decline in the financial resources of the LEA.

A waiver of MOE is for one year.

Expenditures of State Fiscal Stabilization Funds (SFSF):

A state or LEA may treat State Fiscal Stabilization funds as non-federal funds for maintenance of effort (MOE) purposes of other federal programs, including Title I, Part A if the following criterion is met:

The state or LEA will need to demonstrate that the portion of its State Fiscal Stabilization Funds that it seeks to treat as non-federal funds to meet the Title I, Part A maintenance of effort requirements was spent in such a manner that if these funds would have actually been non-federal funds, those funds would have been used towards satisfying the maintenance of effort compliance.

Requirements for Maintenance of Effort (MOE) Calculation

To calculate the required amounts that represent MOE by a school district, the source data must originate from the school district's Annual Audit Reports. MOE calculations for two consecutive years are required as a condition to demonstrate that effort has been maintained for no less than 90 percent of the second preceding year's MOE amount. Annual Audit Report information from the preceding fiscal year and the second preceding fiscal year must be used as the basis for calculation of the two required amounts. Refer to federal Guidance for Title I Fiscal Issues to determine the preceding and second preceding years.

For the year considered, the first step is to *determine the **actual**, **TOTAL** LEA expenditures from the Audit Report (per the audited Location Reconciliation Schedule). Using this total, the second step is to **exclude** certain revenue and expenditures. These have specific topics with Function and Object numbers that provide the data amounts as follows:

Subtract:

Federal Expenditures	Schedule of Expenditures of Federal Awards (SEFA)
Capital Outlay	(All expenditures reported under Function 253 and all expenditures reported under Objects 500-599 for Instructional Functions 110-190, and Support Functions 210-252, 254-271)
Debt Service	(All expenditures reported under Function 500)
Community Services	(All expenditures reported under Functions 310-399)
Pupil Activity	(All expenditures reported under Function 272 and 273)
Intergovernmental	(All expenditures reported under Functions 411-417)

The third step is to divide the result of step two by the school district's 135-Day ADM for that same school year. This sum is the per pupil MOE amount.

The fourth step is to compare the per pupil MOE amount from the preceding to the second preceding year to demonstrate that no less than 90 percent of the MOE effort of the second preceding year has been maintained.

***Optional: A school district may use the aggregate expenditures of State and local funds to illustrate MOE. The aggregate expenditures for the preceding fiscal year must not be less than 90 percent of the aggregate expenditures for the second preceding fiscal year.**

Directions for Electronic Worksheet Calculation of Maintenance of Effort (MOE)

The Excel worksheet is provided electronically for the convenience of calculating the MOE. Determine the preceding and second preceding years (see federal guidance). A worksheet must be done for each using source data from the LEA Audit Report and the 135 ADM for each year. Enter amounts of Audit Report data for **Steps 1,2,3,** into the appropriate cell on the Excel worksheet. The calculation for **Steps 1,2,3,** will be performed automatically. **Step 4** requires data to be transferred from a prior worksheet to the cell in Step 4 for electronic determination of effort. **A paper copy of source data and worksheets must be maintained for Title I monitoring purposes.** Instructions are as follows for entering information in the electronic worksheet:

Step 1:

Input the audit report **Total** LEA expenditures per the audited Location Reconciliation Schedule. This **Total** includes total expenditures as stated on the Statement of Revenues, Expenditures, and Changes in Fund Balances: Governmental Funds, **plus** the total expenditures amount from the Food Service Fund (See Schedule) and the Pupil Activity Fund (See Schedule).

Step 2:

List page number beside each data source or attach copy of dated report from accounting software using appropriate Function and Object numbers. Input amounts for the following items, which are **excluded** from the **Total** in **Step 1:**

Federal Expenditures – Use total from the Schedule of Expenditure of Federal Awards (SEFA).

Capital Outlay – A report from accounting software must reflect appropriate Functions and Objects. Retain copy for MOE file.

Debt Service – Use appropriate Statement or Schedule data.

Community Service – Use total from Statement of Revenues, Expenditures, and Changes in Fund Balances: Governmental Funds.

Pupil Activity Fund –Use Schedule, Functions 272, 273 only.

Intergovernmental – Use total from Statement of Revenues, Expenditures, and Changes in Fund Balances: Governmental Funds.

Step 3:

Input the 135 ADM data for this Audit Year from the district's official report to the Department of Education. The per pupil MOE will be calculated electronically.

Step 4:

Input the per pupil MOE calculated for the year now considered the second preceding year relative to the preceding year just calculated. The MOE determination is now completed automatically by formula statement.

Title I Fiscal Requirements

Electronic Worksheet to Calculate Maintenance of Effort (MOE)

Composite Sample for Second Preceding Year

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)	Page 70	$595,000.00
Capital Outlay (Attach Report)		170,000.00
Debt Service	Page 15	73,500.00
Community Services	Page 15	1,600.00
Pupil Activity Fund	Page 61	45,000.00
Intergovernmental	Page 15	9,800.00
Total Amount Excluded:		**$ (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 **2010**:	$ 6,795.77

Step 4:

The per pupil MOE calculated for the **second preceding** year

from Audit Year **2009**: (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 not be less than ninety percent of the per pupil amount in step 4 to meet the MOE requirement.

Title I Fiscal Requirements

Electronic Worksheet to Calculate Maintenance of Effort (MOE)

Composite Sample for Preceding Year

Step 1:

Preceding Year Audit Report **Total** Expenditures:

(Refer to the audited Location Reconciliation Schedule) **$ 15,934,495**

Step 2:

Items Subtracted From Total Expenditures in Step 1:

(List page number for each data source from Audit Report.)

Federal Revenue (SEFA)	Page 72	$589,295.00
Capital Outlay (Attach Report)		230,000.00
Debt Service	Page 17	80,000.00
Community Services	Page 17	1,300.00
Pupil Activity Fund	Page 64	50,000.00
Intergovernmental	Page 17	6,400.00
Total Amount Excluded:		**$(956,995.00)**

Total Expenditures for MOE Calculation: **$14,977,500.00**

Step 3:

135 ADM: 2,195

The per pupil MOE calculated for the **preceding** year

from Audit Year **2011**: $ 6,823.46

Step 4:

The per pupil MOE calculated for the **second preceding** year

from Audit Year **2010** : (Attach Worksheet) $ 6,795.77

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 not be less than ninety percent of the per pupil amount in step 4 to meet the MOE requirement.

Title I Schoolwide Programs

Title I Non-Regulatory Guidance: C:\Users\JStanley\Desktop\Rules and Regs 2013\Title I Guidance\Designing Schoolwide Programs Guidance 2006.doc http://ed.sc.gov/agency/programs-services/77/documents/Schoolwide_Guidance.pdf

Title I Schoolwide Programs

No Child Left Behind Act of 2001, Section 1114

Purpose

The purpose of a Title I Schoolwide program is to upgrade the entire educational program in a school in order to improve academic achievement so that all students, particularly the lowest-achieving students, demonstrate proficiency of the state's academic standards.

Eligibility of a School to Implement a Schoolwide Program

- The school must be served by Title I.
- Forty percent or more of the children are from low-income families. In most South Carolina schools this is defined as eligibility for free- or reduced-price lunch.
- A school's Title I allocation must be large enough to provide a reasonable assurance that a school can operate a Title I Schoolwide program of sufficient quality enabling the children most at-risk of not meeting South Carolina's academic achievement standards to do so.

Once a Title I Schoolwide program has been approved, a school may continue to implement a Title I Schoolwide program even if the school's poverty percentage falls below 40 percent ***(as long as the school is eligible and served by Title I***).

Identification of Students

A school implementing a Schoolwide program is not required to identify particular children as eligible to participate in a Schoolwide program nor to provide services to such children that are supplementary.

Supplemental Funds

A school implementing a Schoolwide program shall use Title I funds only to supplement the amount of funds that would, in the absence of Title I funds, be made available from non-federal sources for the school (including funds need to provide services that are required by law for children with disabilities and children with limited English proficiency).

Plan Development

According to NCLB, any school that desires to operate a Schoolwide program shall first develop, in consultation with the school district and its school support team or other technical assistance provider (under section 1117), a comprehensive plan for reforming the total instructional program in the school addressing the required components (See "Components of a Schoolwide Program"). A school operating a Schoolwide program must develop a comprehensive plan to improve teaching and learning throughout the school.

The comprehensive plan shall be developed during a one-year period prior to implementation of the Schoolwide program, unless the district, after considering the recommendation of the technical assistance provider working with the school, determines less time is needed to develop and implement the Schoolwide program.

The plan must be developed with the involvement of parents and other community members to be served and individuals who will carry out the plan. This includes:

- Teachers
- Principal
- Administrators
- Parents of students in the school
- Other school staff
- Pupil services personnel, if appropriate
- Technical assistance providers
- In secondary schools – students
- Community members

The plan is reviewed and revised annually by the school.

The Schoolwide program plan must be available to the local educational agency, parents, and the public. The information contained in such plan shall be in an understandable and uniform format and to the extent practicable, provided in the language that the parents can understand.

If appropriate, the plan should be developed in coordination with programs under Reading First, Early Reading First, Early Reading First, Even Start, Carl D. Perkins Vocational and Technical Education Act of 1998 and the Head Start Act.

Pre-Kindergarten Programs

A school that is eligible for a Title I Schoolwide program may use its funds to establish or enhance pre-kindergarten programs for children below the age of six, such as Even Start programs or Early Reading First programs.

Components of a Schoolwide Program

Comprehensive Needs Assessment

A school operating a Schoolwide program must conduct a comprehensive needs assessment of the entire school that:

1. Is based on academic achievement information about all students in the school, including all sub-groups and migratory children relative to the state's academic standards to:
    - help the school understand the subjects and skills for which teaching and learning need to be improved;
    - identify the specific academic needs of students and groups of students who are not yet achieving the state's academic standards; and
    - assess the needs of the school relative to each of the components of the Schoolwide program under section 200.28.
2. Is developed with the participation of individuals who will carry out the Schoolwide program plan.
3. Includes documentation on how the school conducted the needs assessment, the results it obtained, and the conclusions it drew from those results.

Comprehensive Plan

Using data from the comprehensive needs assessment, a school that wishes to operate a Schoolwide program must develop a comprehensive plan, in accordance with section 200.27 of the Title I regulations, that describes how the school will improve academic achievement throughout the school, but particularly for those students furthest away from demonstrating proficiency, so that all students demonstrate at least proficiency on South Carolina's academic standards.

Professional Development

Each school receiving funds under this part for any fiscal year shall devote sufficient resources to effectively carry out the activities (described in section 1119 (b)(1)(D) for such fiscal year, except that a school may enter into a consortium with another school to carry out such activities.

Evaluation

A school operating a Schoolwide program must:

1. Annually evaluate the implementation of, and results achieved by, the Schoolwide program, using data from South Carolina's annual assessments and other indicators of academic achievement;
2. Determine whether the Schoolwide program has been effective in increasing the achievement of students in meeting South Carolina's academic standards, particularly for those students who had been furthest from achieving the standards; and
3. Revise the plan, as necessary, based on the results of the evaluation to ensure continuous improvement of students in Schoolwide programs.

Schoolwide Reform Strategies

The following are reform strategies that must be described in a Schoolwide plan:

1. Provide opportunities for all children to meet South Carolina's proficient and advanced levels of student academic achievement;

2. Use effective methods and instructional strategies that are based on scientifically-based research that (a) strengthen the core academic program in the school; (b) increase the amount and quality of learning time, such as providing an extended school year and before and after-school summer programs and opportunities, and help provide an enriched and accelerated curriculum; and (c) include strategies for meeting the educational needs of historically underserved populations;

3. Provide strategies to address the needs of all children in the school, but particularly the needs of low-achieving children and those at risk of not meeting South Carolina's student academic achievement standards who are members of the target population of any program that is included in the Schoolwide program (which may include counseling, pupil services, mentoring, college and career awareness/preparation, personal finance education, innovative teaching methods, integration of vocational and technical education programs) and address how the school will determine if such needs have been met and are consistent with, and are designed to implement, the state and local improvement plans, if any;

4. Provide instruction provided by highly qualified teachers;

5. Meet the state's student academic achievement standards in accordance with section 1119 (a)(4), high-quality and ongoing professional development for teachers, principals, and paraprofessionals and, if appropriate, pupil services personnel, parents, and other staff to enable all children in the school;

6. Provide strategies to attract high-quality highly qualified teachers to high-need schools;

7. Provide strategies to increase parental involvement in accordance with section 1118, such as family literacy services;

8. Determine plans for assisting preschool children in the transition from early childhood programs, such as Head Start, Even Start, Early Reading First, or a state-run preschool program, to local elementary school programs;

9. Use measures to include teachers in the decisions regarding the use of academic assessments described in section 1111 (b)(3) in order to provide information on, and to improve, the achievement of individual students and the overall instructional program;

10. Provide activities to ensure that students who experience difficulty mastering the proficient or advanced levels of academic achievement standards required by section 1111 (b)(1) shall be provided with effective, timely additional assistance which shall include measures to ensure that students' difficulties are identified on a timely basis and to provide sufficient information on which to base effective assistance; and

11. Show coordination and integration of federal, state, and local services and programs, including programs supported under NCLB, violence prevention programs, nutrition programs, housing programs, Head Start, adult education, vocational and technical education, and job training.

Other Components to be Addressed in the Schoolwide Program Plan:

- Describes how the school will use resources under this part and from other sources to implement those components above.

- Includes a list of state, local and federal programs under section 1114(a)(3) that will consolidated in the Schoolwide program

- Describes how the school will provide individual student academic assessment results in a language that parents can understand, including an interpretation of those results, to the parents of a child who participated in the academic assessments required by section 1111 (b)(3).

Maintaining Required Documentation of a Schoolwide Program

(From Designing Schoolwide Programs: Non-Regulatory Guidance, page 33)

1. A school must retain documentation related to its three core components:
   - the comprehensive needs assessment,
   - the comprehensive Schoolwide plan, and
   - the evaluation.

2. Documentation relating to the needs assessment should include significant information about the achievement of students and conditions in the school that directly affect their academic achievement.

3. Documentation relating to the comprehensive Schoolwide plan must contain specific information about how the program will implement the components, how resources will be used, the programs consolidated to support the Schoolwide program, and how student assessment results will be disseminated.

4. Documentation relating to the evaluation should include the method of evaluation used, and findings that describe the results achieved by the Schoolwide program and its implementation

Differences between Schoolwide Programs and Targeted Assistance Programs

(From Designing Schoolwide Programs: Non Regulatory Guidance, page 6)

Title I Targeted Assistance Programs

- Employs staff paid with Title I funds to serve only those students who have been identified as being most at-risk of not meeting the State's challenging standards.
- Uses multiple measures of student academic achievement to determine which students are eligible to participate in the program.
- Services to eligible students may be provided in a "pullout" setting on a limited basis, or may be provided in the regular classroom.

Schoolwide programs

Schoolwide programs allow staff in schools with high concentrations of students from low income families to redesign their entire educational program to serve all students. The emphasis in schoolwide program schools:

- Uses Title I funds to meet the needs of all students in the school, as determined through a comprehensive needs assessment;
- Does not identify individual students as eligible to participate;
- Makes no distinctions are made between staff paid with Title I funds and staff who are not;
- Expects all school staff to direct their efforts toward upgrading the entire educational program and improving the achievement of all students, particularly those who are low achieving;
- Improves <u>all</u> structures that support student learning;
- Combines <u>all</u> resources, as allowed, to achieve a common goal; and
- Maximizes the impact of Title I.

Meeting the Requirement of Title I Schoolwide Program Planning Team by Considering School Improvement Council Members

Title I Schoolwide Programs **Title I Requirement Must be Addressed**	**South Carolina School Improvement Councils** **State Requirement** **(http://sic.sc.gov/)**
Parents	Parents (elected)
Teachers	Teachers (elected)
Students, in a secondary school	Students, grade 9–12 required (elected) Middle school students optional
Principal	Principal, Ex-Officio Member *
Community Members	Representatives of business, civic or service organizations (appointed by principal) *and* May be agencies representing medical, social service, law enforcement and others also considered in community category
Local Agency Administrators (include other Federal Programs)	May be elected as part of teacher category or when appropriate designated as ex-officio
Pupil Services Personnel – If appropriate (guidance counselor, social worker, etc.)	May be agencies representing such as medical, social service, or mental health and May be elected as part of teacher category or when appropriate designated as ex-officio
Technical Assistance Provider(s) – (SSI Hub, Teacher Specialists, higher education-IHE, etc.)	May be elected as part of teacher category or when appropriate designated as ex-officio
Other School Staff	
	* Ex-officio members may also include: • PTA/PTO president, • Volunteer coordinator, • Title I parent advisory chair, • Business partner, • Booster Club president, • Teacher of the Year, and • Last year's SIC Chair

NOTE: Concerning School Improvement Council:

Two thirds of the members must be elected parents, students and teachers. The principal appoints the remaining third of the council, careful to ensure broad representation from the larger school community including non-parent taxpayers who have a special expertise or perspective. There is no limit to the number of ex-officio members; it is expected they are named by position due to their contribution to the implementation of the five-year plan**.**

Consolidating Funds in Schoolwide Programs

Consistent with section 1114 of Title I, a school that consolidates and uses Schoolwide programs and funds from other federal programs administered by the Secretary (except for Reading First) are not required to meet most statutory or regulatory requirements of the program applicable at the school level. However, the Schoolwide program must meet the intent and purposes of the programs that are consolidated but must meet the intent and purposes of that program to ensure that the needs of the intended beneficiaries are met. Such a school must be able to demonstrate that its Schoolwide program contains sufficient resources and activities to reasonably address the intent and purpose of included programs, particularly as they relate to the lowest performing students.

The school is not required to maintain separate fiscal accounting records, by program, that identify the specific activities supported by those particular program funds. It must, however, maintain records that demonstrate that the Schoolwide program as a whole addresses the intent and purposes of each federal education programs whose funds were consolidated.

A school that chooses to use funds from such other programs shall not be relieved of the requirements relating to health, safety, civil rights, student and parental participation and involvement, services to private school children, maintenance of effort, comparability of services, uses of federal funds to supplement, not supplant non-federal funds, or the distribution of funds to South Carolina Department of Education or districts that apply to the receipt of funds from such programs.

Within the general Schoolwide consolidation authority, a Schoolwide program may consolidate funds received under the following programs only as outlined below:

- **Individuals with Disabilities Education Act (IDEA), Part B**
- Discretionary (competitive) Grant Programs, except Reading First
- Title I, Part C: Migrant Education
- **Title I, Part D, Subpart 2: Prevention and Intervention Programs for Children and Youth Who are Neglected, Delinquent, or At-risk**
- Title II, Part A: Preparing, Training, and Recruiting High Quality Teachers and Principals
- Title III, Part A, Subpart 1: English Language Acquisition and Language Enhancement and Academic Achievement
- Title IV, Part A, Subpart 1: Safe and Drug-free Schools and Communities State Grants Program

Basic Planning Process for Title I Schoolwide Programs

1. Present information on Title I Schoolwide programs to the school community and determine if the school is eligible to plan and implement a Title I Schoolwide program. Then a decision can be made, in consultation with the district, to plan and implement a Schoolwide program.

2. Establish a Schoolwide planning team including representatives as required by Title I legislation. Obtain high-quality technical assistance and support from providers of assistance which includes institutions of higher education, educational agencies, other local consortia, etc.

3. Conduct a comprehensive needs assessment planning of the entire school and identify needs based on data**.**

4. Review required Title I reform strategies, prioritize identified needs, and brainstorm areas to research.

5. Review research on effective methods or instructional strategies to meet the identified needs, which is based upon **scientifically based research.**

6. Determine research-based effective strategies, models, or programs to implement that will address the required strategies and meet the needs in each research group.

7. Conduct site visits of schools implementing effective strategies, models, or programs and report back to the school community.

8. Make the decision on what effective strategies, models, or programs will be implemented to address the identified needs including staff and long term staff development to be implemented. Identify consultants, training, etc.

8. Complete Title I Schoolwide program plan for the school including working with the Title I Coordinator on the budget for the plan, which ties to the identified needs, required strategies, and supports the plan.

9. Submit Title I Schoolwide plan to district for approval. The district will submit the district Title I project, including the Schoolwide plan, to the state for approval.

Basic Process for Annually Updating the Title I Schoolwide Program Plan

1. **Annually evaluate the implementation of, and results achieved** by, the Schoolwide program, using data from South Carolina's annual assessments and other indicators of academic achievement. Determine whether the Schoolwide program has been effective in increasing the achievement of students in meeting South Carolina's academic standards, particularly for those students who had been furthest from achieving the standards. **(Document the results of the evaluation in Schoolwide meeting notes.)**

2. Updated needs assessment data to see if the needs have changed.

3. Revise the needs assessment summary.

4. Make any modifications in the program as needed based on the identified needs, annual evaluation, and scientifically based research.

5. Revise the Title I Schoolwide program plan, as necessary, based on the results of the evaluation and updated needs assessment data, to ensure continuous improvement of students in Schoolwide programs.

6. Complete Title I Schoolwide program plan for the school including working with the Title I Coordinator on the budget for the plan, which ties to the identified needs, required strategies, and supports the plan.

7. Submit Title I Schoolwide plan to district for approval. The district will submit the district Title I project, including the Schoolwide plan, to the state for approval.

Title I Targeted Assistance Programs

Targeted Assistance Programs

No Child Left Behind Act of 2001, Section 1115

For schools selected to receive Title I funds that are ineligible for or that choose not to operate a Schoolwide program, a district serving such schools may use Title I funds only for Targeted Assistance programs that provide services to eligible children identified as having the greatest need for special assistance.

Eligible Population

The population eligible for services in a Targeted Assistance program are:

- children not older than age 21 who are entitled to a free public education through grade 12; and
- children who are not yet at a grade level at which the local educational agency provides a free public education.

Student Selection from Eligible Population

1. In Targeted Assistance programs, students having the greatest need for special assistance are eligible to participate in the program based on the following criteria:

    - **Preschool through grade 2** students shall be selected solely on the basis of such criteria as teacher judgment, interviews with parents, and developmentally appropriate measures.
    - **Grades 3-12** students shall be selected based on those failing or most at risk of failing to meet the state's challenging student academic achievement standards on the basis of multiple, educationally related, objective criteria established by the LEA and supplemented by the school.

2. Children who are economically disadvantaged, children with disabilities, migrant children or limited English proficient children, are eligible for services under Targeted Assistance

programs on the same basis as other children selected to receive services in Targeted Assistance programs.

- A child who, at any time in the two years proceeding the year for which the determination is made, participated in a **Head Start, Even Start, or Early Reading First program, or in a Title I preschool program**, is eligible for services under Targeted Assistance programs.

- A child who, at any time in the two years proceeding the year for which the determination is made, received services under **Title I, Part C (Migrant Education)** is eligible for services under Targeted Assistance programs.

- A child in a local institution for **neglected or delinquent** children and youth or attending a community day program for such children is eligible for services under Targeted Assistance programs.

- A child who is **homeless** and attending any school served by the local educational agency is eligible for services under Targeted Assistance programs.

SPECIAL RULE: Funds received under Targeted Assistance programs may not be used to provide services that are otherwise required by law to be made available to children described above, but may be used to coordinate or supplement such services.

Simultaneous Service

Nothing in Targeted Assistance programs shall be construed to prohibit a school from serving students under Targeted Assistance programs simultaneously with students with similar educational needs, in the same educational settings where appropriate.

Components of a Targeted Assistance School Program

Each school conducting a Targeted Assistance program **shall assist participating children selected to meet the state's proficient and advanced levels of achievement by**:

- Ensuring that planning for students served under Targeted Assistance programs is incorporated into existing school planning.

- Providing a description of how teachers, in consultation with parents, administrators, and pupil services personnel will identify the eligible children most in need of services.

- Identifying programs or strategies based on scientifically based research.

- Coordinating the resources provided under Targeted Assistance programs with other resources.

- Addressing seven reform strategies with Title I funded and other federal, state, and local funded activities to meet the identified needs. The reform strategies are:

    1. Use such program's resources under this part to help participating children meet such state's challenging student academic achievement standards expected for all children;

    2. Use effective methods and instructional strategies that are based on scientifically based research that strengthens the core academic program of the school and that (1) give primary consideration to providing extended learning time, such as an extended school year, before- and after-school, and summer programs and opportunities; (2) help provide an accelerated, high-quality curriculum, including applied learning; and (3) minimize removing children from the regular classroom during regular school hours for instruction provided under this part;

    3. Coordinate with and support the regular education program, which may include services to assist preschool children in the transition from early childhood programs such as Head Start, Even Start, Early Reading First or state-run preschool programs to elementary school programs;

    4. Provide instruction by highly qualified teachers;

    5. In accordance with section 1115 (e)(3) and section 1119 of the *No Child Left Behind Act* (NCLB), provide opportunities for professional development with resources provided under this part, and, to the extent practicable, from other sources, for teachers, principals, and paraprofessionals, including, if appropriate, pupil services personnel, parents, and other staff, who work with participating children in programs under this section or in the regular education program;

    6. Provide strategies to increase parental involvement in accordance with section 1118 of NCLB, such as family literacy services; and

7. Coordinate and integrate federal, state, and local services and programs, including NCLB programs, violence prevention programs, nutrition programs, housing programs, Head Start, adult education, vocational and technical education, and job training.

Program Review

Review, on an ongoing basis, the progress of participating children and revising the targeted assistance program, if necessary, to provide additional assistance to enable such children to meet the state's challenging student academic achievement standards, such as an extended school year, before- and after-school, and summer programs and opportunities, training for teachers regarding how to identify students who need additional assistance, and training for teachers regarding how to implement student academic achievement standards in the classroom.

Professional Development and Limited Duties

To promote the integration of staff supported with Title I funds into the regular school program and overall school planning and improvement efforts, public school personnel who are paid with Title I funds may:

- participate in general professional development and school planning activities; and
- assume limited duties that are assigned to similar personnel who are not so paid, including duties beyond classroom instruction or that do not benefit participating children, so long as the amount of time spent on such duties is the same proportion of total work time as prevails with respect to similar personnel at the same school.

Types of Targeted Assistance Programs

Subjects: English language arts or mathematics

Instructional Approaches	Types of Targeted Assistance Programs
• Floating teacher • Floating paraprofessional • Readiness aide • Tutor • Coordinating teacher and floating paraprofessional • Computer assisted instruction • Other **activities which would occur in the regular classroom setting**	In-class
• Special class such as Reading Recovery • Computer assisted instruction • Coordinating teacher and floating paraprofessional • Floating paraprofessional • Other **activities which would be offered in a different setting or different time**	Limited Pull-out (Test 2)
• Alternate class (which is in lieu of the required subject) • Special class (which is in addition to the regular instruction in the subject area but offered at a time the participants would normally receive instruction in an elective subject such as band, etc.) *Please contact the Office of Federal and State Accountability prior to implementation.*	Extended Pull-out or Replacement
• Extended school year • Before-school • After-school • Summer school program • Computer assisted instruction of ten minutes or less • Extended day kindergarten • Extended day pre-kindergarten • Pre-kindergarten	Add-on

Basic Planning Process for Targeted Assistance Programs

Planning for students in targeted assistance programs shall be incorporated in to existing school planning.

1. Conduct planning in consultation with teachers involved in the instruction of the students being served. Schools, in consultation with their districts, have determined the use of funds that best meet the needs of their students.

2. Determine the needs and effective methods or instructional strategies to implement based on the needs of the eligible students and scientifically based research.

3. Conduct student selection process.

   - Utilize the student selection process for reading and math programs separately.

   - Select children who are failing or most at risk of failing to meet the state's challenging student academic achievement standards based on the following:

     Preschool through grade 2 students shall be selected solely on the basis of such criteria as teacher judgment, interviews with parents, and developmentally appropriate measures. (points given for each criteria)

     Grades 3-12 students shall be selected based on those failing or most at risk of failing to meet the state's challenging student academic achievement standards on the basis of multiple, educationally related, objective criteria established by the LEA and supplemented by the school. (points given for each criteria)

   - List total points by student in rank order, high to low by grade.

   - Serve children in rank order without skipping a child.

   - Students are ranked for each subject and students with the greatest need are served for each subject as far as funding allows.

4. Complete Targeted Assistance Program plan for each school being served.

5. Review the progress of participating children and revise the targeted assistance program, if necessary, to provide additional assistance to enable children to meet the state's challenging standards.

Title I Support Services

Support Services

No Child Left Behind Act of 2001, Section 1115(e)(2)

Supplemental health, nutrition and other social services for Title I children:

- Are based on comprehensive needs assessment;
- Have established a collaborative partnership with local providers;
- Ensure that services are supplemental;
- Are provided when funds are not reasonably available from other public or private sources to provide such support services; and
- Use Title I funds for these services as a last resort.

Services include:

- the provision of basic medical equipment, such as eyeglasses and hearing aids;
- compensation of a coordinator; and
- professional development necessary to assist teachers, pupil services personnel, other staff, and parents in identifying and meeting the comprehensive needs of eligible children.

SAMPLE SUPPORT ACTIVITY #1

DISTRICT: Sumter School District 2

CHECK APPLICABLE BOX:

X District Set-aside

☐ Schoolwide Activity, Name of School: _____

☐ Targeted Assistance Activity, Name of School: _____

Needs Assessment

Support Activity	Critical Need?		Students Needing Assistance (Needs Assessment Data)		Type of Documentation for Needs Assessment Data
	Yes	No	Number	Percent	
Health/Dental	X		898	15%	Health Records

Additional narrative justification of need:

A nursing assessment can be a vital factor in identifying problems which may impede future educational process unless a corrective course of action is undertaken. The district's comprehensive nursing program provides for schoolwide health screening in accordance with the state DHEC Guidelines. In addition to the state requirements, all students actively participating in a Title I program will be provided a visual and hearing screening. The elementary students will also be provided a dental screening in Title I programs. These supplemental services are provided to keep from impacting students' academic progress so that they interact and pay attention in the classroom, are not late, or not attend class which causes them to miss instruction.

Lack of knowledge concerning proper health standards to be followed, lack of knowledge of resources available in the community, as well as poor compliance for the economically and academically deprived Title I student further substantiates the need for appropriate intervention. Health education is the primary vehicle utilized for more comprehensive care since it can prevent many health problems with a medical referral.

Parents/guardians are informed of any identified health problem. The parents/guardians are also offered assistance in meeting this need. The assistance may be in the form of coordinating the needed health care via transportation, scheduling the appointment, or referral to a community resource. Home visits are made by nurses as needed for the Title I student and these visits will provide a vehicle for more comprehensive care.

A percentage of the salaries for the personnel providing health service activities will come from Title I funds District Set-Aside.

I. State measurable objectives and the manner in which evaluation data will be collected.

Objective 1: By December 1, 2007, Title I Nurses will have referred to the appropriate persons or health agencies 100% percent of all students participating in a Title I Program who are identified as needing visual, hearing, dental and/or medical follow-up.

Evaluation: A list of referrals from each Title I School including dates, problems, and disposition of the cases of eligible children who qualify for Medicaid services will be kept by each nurse throughout the contact period.

Objective 2: By May 2008, Title I Nurses will have prepared individual follow-up analyses for all Title I students referred for medical and/or dental attention.

Evaluation: Student health records will be appropriately documented.

Objective 3: As an on-going process, the nurses who this activity support will act as resource people for the Title I families providing assistance as needed. This assistance may include but is not limited to arranging doctor's appointment, locating community resources, and assisting with transportation.

Evaluation: Each nurse will maintain documentation of activities including dates, contacts and care dispositions throughout the contract period.

Objective 4: As an on-going process, Title I students identified with a health need will be provided proper health education when health counseling may provide a more positive outcome. Parents/guardians will be involved when needed.

Evaluation: Agenda, sign-in list, logs and calendars will document workshops and conferences during the contract period.

Objective 5: As an on-going process, the Title I nurses will maintain follow-up of identified problems through contact with the student, parent and teacher.

Evaluation: The logs of each nurse will list all contacts.

II. State how students will be selected for this service and how this activity is supplementary to services provided for all students.

Procedures for establishing eligibility for Title I Health Services:

1. Check with parent/guardian regarding awareness of the health problem and determine if treatment is already in progress.
2. Ascertain parent understanding of need for remediation and educate parent when necessary.
3. Determine financial situation of family. Is child currently served or eligible for an existing program, i.e. Medicaid, Health Reach, CRS, etc.?
4. If no other financial assistance is available, Title I funds will be used for dental and medical needs.
5. The nurse will work with the parent in making appointments and will encourage full parent/guardian participation in remediation of students' health problem.

Should a student require immediate medical or dental attention, parents are notified that the child needs medical attention. If the project student has no other financial resources, the nurses will assist the parent in arranging an appointment with a doctor or dentist in the area. The nurse obtains medical benefits for students whenever possible through local county health agencies, church groups, or community resources such as Tuomey Health Reach.

Whenever such medical funds are not available, the medical cost for examination and treatment will be paid from the Title I funds to include diagnosis, short term illness, emergencies and other medically related conditions which would prohibit the student from realizing the full educational benefit of the Title I Program. This action must be approved by the Title I Director.

The Title I Nurse will utilize the resources found at the Parent Resource Center to enhance health education for all students of the program.

III. Staff Qualifications and Professional Development

Staff	Qualifications	In-service Topics
Pamela Rogers	RN	OSHA Guidelines, First Aid/CPR
Caroline Faber	RN	Medical Emergency Response
Sandra Stuckey	RN	Team Annual Meeting
Anita Barnes	RN	

All Title I Schools are eligible.

IV. Non-Public School Participation (applicable for district set-aside programs only):
Services have been extended to the private schools for this activity; upon request they will be provided.

V. By checking the box at right, the LEA assures that (if applicable):

A collaborative partnership with local service providers has been established.	☒
List collaborative partnerships: DHEC Department of Social Services Child & Advocate Services Mental Health Tuomey Health Reach Health Promotions	
Funds are not reasonably available from other public or private sources to provide these services and that Title I funds are being used as a last resort.	☒
Health, nutrition, and social services are not otherwise available to eligible children.	☒

SAMPLE SUPPORT ACTIVITY #2

DISTRICT: Sumter School District Two

CHECK APPLICABLE BOX:

☐ District Set-aside

X Schoolwide Activity, Name of School: Rafting Creek Elementary School

☐ Targeted Assistance Activity, Name of School: _____

Needs Assessment

Support Activity	Critical Need?		Students Needing Assistance (Needs Assessment Data)		Type of Documentation for Needs Assessment Data
	Yes	No	Number	Percent	
Social Work	X		165	78%	Teacher Referrals, Travel logs, Reports
Clothing	X		34	24%	Store Vouchers

Additional narrative justification of need:

Rafting Creek Title I social worker provides comprehensive Social Work services to one school-wide program and thirteen classes during the 2006–2007 school year. Social work services included: intervention strategies to alleviate academic problems, home visits, community agencies referrals, individual/group counseling, clothing voucher services, and crisis intervention services. The Title I social worker serves on the Student Assistance Team and prepares assessments of student's developmental and social

histories prior to the student assistance team meeting. The Title I social worker conducts in-services training and workshops on the Parent-Child Home Program to community agencies, housing communities and businesses. Partnerships with community agencies and businesses are developed to ensure Title I families has assess to community resources.

The Title I social worker provides consultation and support to parents pertaining to parent education workshops. The Title I social worker reviews the application requests for Title I clothing voucher services for one school. The applications are reviewed for accuracy and compliance with federal regulations. The Title I social worker provides in-service training to staff on the Title I clothing voucher program.

The Title I social worker serves as a Tutorial Liaison for the Title I families. The Tutorial Liaison was designed to help families access and utilize available tutorial programs. Of the 210 students, including kindergarten, enrolled in the school-wide program, Title I social worker and school based Title I staff served 165 individual students during the 2006–2007 school year. Of this number 34, students received 34 sets of clothing, 34 jackets, and 34 pair of shoes.

Title I Clothing and/or Shoe Voucher:

Title I students are eligible for clothing and/or shoe vouchers when a need for services is identified. Title I clothing and/or shoe voucher services will be rendered by school based staff and/or Title I social worker.

I. State measurable objectives and the manner in which evaluation data will be collected.

School Social Worker and Clothing/Shoe Voucher:

Objective I.

During the 2007–08 school year, the Title I social worker will participate in scheduled planning and staffing sessions. The team includes the teacher, consultant, nurse, psychologist, and social worker.

This objective is evaluated based on school maintained records which document the date meetings are held, the name of the student, persons present and any decisions made on behalf of the student.

Objective II.

By the end on the 2007–08 school year, the Title I social worker will provide intervention strategies to identified students to alleviate academic deficiencies including clothing and shoe vouchers.

This objective will be evaluated by maintaining case logs and district travel records. Individual student case recordings with document content of conferences with students and/or parents including clothing and shoe vouchers.

Objective III.

During the 2007–2008 school year, the Title I social worker will continue to support the school in increasing parental involvement.

This objective's evaluation will evolve from the planning process for each activity including a descriptive narrative account of each parental involvement activity and a log showing dates, names of participants and other documentation described in Objective II above.

II. State how students will be selected for services and how this activity is supplementary to services provided for all students.

Any student or parent/guardian of a student enrolled is eligible for the above-described services of the Title I social worker or Title I staff. Title I students are selected to receive services based on individual teacher referrals. Students are considered eligible for the welfare component based on documented individual family income levels, using free and reduced lunch guidelines of eligibility. The welfare component is compensatory and supplementary in that the school district does not provide these services to its regular student population.

During the 2007–2008 school year, the Title I social worker will continue to provide direct services to students needing clothing and shoes, either referrals from social workers or direct parent notification.

III. Staff Qualifications and Professional Development

Staff	Qualifications	In-service Topics
1 School social worker (1.0 FTE)	Licensed Bachelor of Social Worker Master of Education	Regular monthly social work in-service is provided for all school social workers. Topics vary each month and include services delivery and ethical issues.

IV. Non-public School Participation (if applicable):

During the 2006–07 school year, there were no students enrolled from private schools. Eligible Title I students enrolled in private and parochial schools will receive services from Title I social work staff on a referral basis. These referrals are channeled through the Coordinator of Social Work Services for Sumter County School District Two. Referral forms are made available to all non-public schools having eligible Title I students.

V. By checking the box at right, the LEA assures that (if applicable):

A collaborative partnership with local service providers has been established.	☒
List collaborative partnerships: DHEC Department of Social Services Child & Adolescent Services Mental Health	
Funds are not reasonably available from other public or private sources to provide these services and that Title I funds are being used as a last resort.	☒
Health, nutrition, and social services are not otherwise available to eligible children.	☒

Supplement, Not Supplant

Title I Non-Regulatory Guidance: C:\Users\JStanley\Desktop\Rules and Regs 2013\Title I Guidance\Fiscal Issues Guidance 2008.doc http://ed.sc.gov/agency/programs-services/77/documents/Fiscal_Guidance.pdf

Supplement, Not Supplant

A district may use Title I funds to supplement programs and services that are provided for with state and local funds for the education of students participating in Title I programs. In no case may Title I funds be used to supplant—take the place of—state and local funds. In order to meet the supplement, not supplant requirement, a district is not required to provide Title I services using a particular instructional method or in a particular instructional setting.

Presumption of Supplanting

To determine compliance with the supplement not supplant requirement, the state must determine which services a district would have provided to students in Title I schools in the absence of Title I funds. Any supplanting determination is very case specific and is difficult to provide general guidelines without examining the details of the situation. The state would use a set of presumptions—that is, predictions—of what the district would have provided in the absence of Title I funds based on its behavior in other situations.

"In the following instances, it is presumed that supplanting has occurred:

1. An LEA used Title I funds to provide services that the LEA was required to make available under federal, state, or local law.

2. An LEA used Title I funds to provide services that the LEA provided with non-federal funds in the prior year(s).

3. An LEA used Title I funds to provide services for children participating in a Title I program that the LEA provided with non-federal funds to children not participating in Title I. "

These presumptions, however, are rebuttable if the LEA can demonstrate that it would not have provided the services in question with non-Federal funds had the Federal Title I funds not been available.

Exclusions

When determining whether Title I funding is supplemental, the state or a district may exclude state and local funds expended in any school for carrying out a program that meets the intent and purposes of Title I, Part A. (These exclusions also apply when determining whether Title I and non-Title I schools are comparable.)

A program that meets the intent and purposes of Title I, Part A if the program --- (Similar to Title I Schoolwide Project programs)

- Is implemented in a school where at least 40 percent of the children are from low-income families;
- Is designed to promote schoolwide reform and upgrade the entire educational operation of the school to support students in their achievement standards that all students are expected to meet;
- Is designed to meet the educational needs of all students in the school, particularly the needs of children who are failing, or most at risk of failing, to meet the state's academic achievement standards; and
- Uses the state's system of assessment to review the effectiveness of the program.

Or--- (Similar to Title I Targeted Assistance Programs)

- Serves only students who are failing, or most at risk of failing, to meet the state's challenging student academic achievement standards;
- Provides supplementary services designed to meet the special educational needs of students who are participating in the program to support their achievement toward meeting the state's student academic achievement standards; and
- Uses the state's system of assessment to review the effectiveness of the program.

Targeted Assistance Schools

A district and school have flexibility in selecting the instructional strategies they believe will best meet the needs of students most educationally at-risk of not meeting state standards. Targeted assistance programs that do not remove children from the regular classroom for Title I instruction during regular school hours and, instead, provide extended learning time (e.g., extended school year, before- and after-school, and summer school programs etc.) are considered to be supplemental. Districts and schools are encouraged to be creative in the way they provide services to Title I children while remembering that the educational services provided with Title I funds must be in addition to services the district and school provides to all its students using state and local funding sources (examples of targeted assistance models can be found at the end of this section).

Schoolwide Program Schools

Unlike a targeted assistance program, a schoolwide program school is not required to select and provide supplemental services to specific children identified as in need of services. All children in a schoolwide program are considered eligible for Title I services. However, a district must be mindful that the supplement not supplant provisions are still applicable to schools operating schoolwide programs.

Supplement, Not Supplant Examples

1. A district used Title I funds to provide services that the district provided with non-federal funds in the prior years.

EXAMPLE:

A district paid for a reading specialist's salary from state and local funds in the previous year. The reading specialist spends 100 percent of her time serving children at a Title I school. In the current year the district decides to pay for the reading specialist's salary with Title I funds. Is this allowable under Title I law?

ANSWER:

This would be supplanting because the district is replacing state and local funds with Title I funds to pay for the same teaching position. However, if a district could provide programmatic and fiscal documents showing that the reading specialist position paid for in the previous year with state and local funds was eliminated in the current year due to state and local budget cuts, then in this example the district would not be supplanting. To disprove supplanting, the district would need to ensure that it had contemporaneous records to confirm:

- There was a reduced amount or lack of state and local funds available to pay for this position.

- The district made the decision to eliminate the position without taking into consideration the availability of federal funding, along with reasons for that decision---e.g., school board minutes.

2. A district used Title I funds to provide services for children participating in a Title I program that the district provided with non-federal funds to children not participating in a Title I program.

EXAMPLE:

A state only requires half-day pre-kindergarten (pre-K). Last year the district offered pre-K at its elementary schools in the morning. The current year the district decides to offer a full-day pre-K program for all children. The district uses state and local funds to pay for the full-day pre-K in its non-Title I schools. In its Title I schools, state and local funds pay for one half of the full-day pre-K and Title I funds pays for the other half. Is this allowable under Title I law?

ANSWER:

No, a district may not use Title I funds to pay for an extended-day pre-K programs for Title I schools and then use state or local funds to pay for the full-day pre-K program in the non-Title I schools. A district may not use Title I funds to pay for services in Title I schools and use state or local funds to pay for the same services in non-Title I schools.

However, these presumptions are refutable if the district can demonstrate that it would not have provided the services in question with non-federal funds had the Title I funds not been available. In example 1 above, the district would need to ensure it had records to prove that this was not supplanting.

Class Size Reduction:

IS IT SUPPLEMENTAL OR DOES IT SUPPLANT?

Title I Non-Regulatory Guidance: http://ed.sc.gov/agency/programs-services/77/documents/Fiscal_Guidance.pdf

Class Size Reduction: Is it supplemental or does it supplant?

If a school is implementing class size reduction as part of the Title I Schoolwide Program, the district and/or school must annually check class size reduction activities to ensure that the school activity is supplemental and does not supplant. The school must be able to serve all students in a grade level or subject area without going above the state required maximum number of students in a class for the grade level/subject area. The question to ask: "Is the school able to appropriately serve all the students without Title I funds and not go over the state required maximum number of students in a class at a particular grade level?"

The state's required maximum number of students (based on State Board Regulations R 43-231, R 43-232, and R 43-234) per class for each grade level (and in some cases subject areas) are as follows:

Grade Level	**State required maximum number students in a class**
Prekindergarten	20:1
Kindergarten	30:1
1	30:1
2	30:1
3	30:1
4 and 5 ELA and math	30:1
4 and 5 Other subjects	35:1
6	30:1

ELA and math	with teacher load not to exceed 150 students daily
6 Other subjects	35:1 with teacher load not to exceed 150 students daily
7 and 8	35:1 with teacher load not to exceed 150 students daily
9-12	35:1 with teacher load not to exceed 150 students daily
Special Education	Refer to the State Board Regulations

Each type of class size reduction has a different way to check to ensure that the school activity is supplemental and does not supplant

Class Size Reduction in a self-contained setting or when students change classes among the grade level teachers

To verify that a school's class size reduction activity is supplemental and does not supplant, follow the steps below.

1. Run a PowerSchool report for the grade in the school which has a class size reduction activity in the Schoolwide Program application. PowerSchool will report the number of students in the grade and the number of classroom teachers assigned to that grade level (do not include music, art, physical education or other supplemental teachers that work with students at this grade level).

2. Subtract the Title I funded teachers for that grade level from the total number of classroom teachers for that grade level.

3. Divide the number of students at the grade level by the number of non-Title I teachers assigned to that grade level.

4. If the figure determined in #3 is **at or below** the state required maximum number of students per class in that grade level, then the school's activity is supplemental.

5. If the figure in step #3 is **above** the state required maximum number of students per class in that grade level, then the school's activity is not supplemental and **may be considered supplanting**.

SAMPLE

Title I Schoolwide Program Activity

Implement class size reduction in grade 2 with 1 teacher @ 1.0 FTE and grade 4 with 1 teacher @ 1.0 FTE in ELA and math to provide more individual and small group academic instruction in all subjects, which are both self-contained grade level classes.

Grade 2:	Before reduction	1:25
	After reduction	1:21
Grade 4:	Before reduction	1: 31
	After reduction	1:26.5

See actual calculations below for these samples.

Grade 2:

Number of second grade students = 150

Number of second grade teachers without Title I funds = 6

Number of second grade teachers with Title I funds = 7

State required maximum class size for second grade = 30

Before reduction: 150 divided by 6 = 25 students per class to 1 teacher (without a Title I funded teacher). **This is under the state required maximum class size for second grade, which means that this activity is supplemental.**

After reduction: 150 divided by 7 = 21 students per class to 1 teacher (with a Title I funded teacher)

Grade 4:

Number of fourth grade students = 186

Number of fourth grade teachers without Title I funds = 6

Number of fourth grade teachers with Title I funds = 7

State required maximum class size for fourth grade (ELA & math) = 30

Before reduction: 186 divided by 6 = 31 students per class to 1 teacher (without a Title I funded teacher). **This is over the state required maximum class size for fourth grade, which means that this activity <u>is supplanting</u>.**

After reduction: 186 divided by 7 = 26.5 students per class to 1 teacher (with a Title I funded teacher). **The school should not use a Title I teacher to meet the state required maximum class size for fourth grade.**

Class Size Reduction in a Departmentalized Setting

To verify that a school's class size reduction activity for a particular subject is supplemental and does not supplant, follow the steps below.

1. Run a PowerSchool report to indicate the school's enrollment.

2. Using the master schedule, count the total number of classes for the identified subject. Then count the number of classes for the identified subject taught by teachers funded by Title I.

3. To determine if this activity is supplemental or if it supplants, divide the number of students by the number of classes in that subject minus the Title I funded teachers' classes for that subject. If the class size is **at or below** the state required maximum number of students per class in that grade level/subject area, then the school's activity is supplemental.

   ____ (total number of students) divided by ___ (the total number of classes minus the number of classes taught by Title I funded teachers for that subject) = _____ (class size which must be under the state maximum number of students)

4. To determine what the class size is after reducing class size with a Title I teacher(s), divide the number of total students by the total number of classes for that subject.

   ____ (total number of students) divided by ___ (total number of subject area classes, including Title I funded teacher) = _____

SAMPLE

Title I Schoolwide Program Activity

Implement class size reduction for math with 1 teacher @ 1.0 FTE to provide more individual and small group academic instruction in math in grades 6, 7, and 8.

Math Class Size: Before reduction 1: 28.75

After reduction1: 19.16

See actual calculations below for this sample.

Before Title I funds were used for class size reduction: 230 (total number of students in grades 6, 7, and 8) divided by **8** (number of math classes minus the number of math classes taught by Title I teacher) = **28.75** (a class size 28.75 is under the state maximum number of students of 30 for these grade levels)

After Title I funds were used for class size reduction: 230 (total number of students in grades 6, 7, and 8) divided by **12** (total number of math classes, including the number of math classes taught by Title I funded teacher)=**19.16**

Please note that <u>every</u> scenario for class size reduction is not included in the samples above and that the samples do not address the current state suspension* of the class size reduction requirements. The Office of Federal and State Accountability may need to be contacted to develop a test for supplement, not supplant for class size reduction situations that do not apply to the samples above and <u>must</u> be contacted if a district is using the state waiver of class size and reducing class size with Title I funds.

***See the 2010-11 S.C. Department of Education's Funding Manual, Appendix A.**

Participation of Children Enrolled in Private Schools

Title I Non-Regulatory Guidance: http://ed.sc.gov/agency/programs-services/77/documents/Private_School_Guidance.pdf

Participation of Children in Private Schools

The Title I program provides supplemental educational services so that all children have a fair, equal, and significant opportunity to obtain a high-quality education. Generally, to qualify for assistance under Title I, a student must reside within the attendance area of a participating public school located in a low-income area and be failing, or at risk of failing, to meet student academic achievement standards.

Under Title I, districts are required to provide services for eligible private school students, as well as eligible public school students. In particular, Section 1120 of Title I, Part A of the Elementary and Secondary Education Act (ESEA), as amended by the No Child Left Behind Act (NCLB), requires a participating district to provide eligible children attending private elementary and secondary schools, their teachers, and their families with Title I services or other benefits that are equitable to those provided to eligible public school children, their teachers, and their families.

The Title I services provided by the district for private school participants are designed to meet their educational needs and supplement the educational services provided by the private school. These services may be provided by the district, or by a contractor who is independent of the private school and any religious organization. Title I services or benefits must be secular, neutral, and non-ideological.

Low-income private school children residing in public school attendance areas served by Title I determine the amount of money generated for the district administered Title I private school program. However, the private school children that receive Title I services are determined by (1) residence in a participating public school attendance area and (2) educational need. Poverty is not a criterion for receiving services.

Contacting Private Schools

Each LEA must contact private schools within and possibly outside their district which could potentially be educating a Title I child from the district. Guidance received from the United States Department of Education requires that you should contact a private school within a 25 mile radius of a district served Title I school. Your district may have none, one, or many private schools which meet the above criteria for contact.

Letters should be sent to private schools before the end of March or early April. This will give you enough time before the end of the school year to properly consult with a private school that would like to participate in Title I.

To determine which schools to contact please use the 25 mile radius guidance and consult the SCDE Web site at:

http://ed.sc.gov/agency/programs-services/77/PrivateSchoolsinSouthCarolina.cfm

for a list of private school websites. The SCDE does not maintain a list of private schools in the state. Our website link above directs you to 3 external websites that maintain lists of private schools in the state. These websites may not be all inclusive so you should not rely on them solely to contact private schools. You should also consult your local telephone directory, your Chamber of Commerce, and use local knowledge concerning private schools in your area. Since private schools are not required to register with the SCDE or any private school association you must use the multiple means listed above to find them.

A letter must be sent to solicit the involvement of each identified private schools to take part in Title I if the private schools has a student(s) from your district who would have been enrolled in a Title I served school in your district. Please address the letter to a person of authority at the school such as the headmaster. The letter should contain information on Title I, the private schools potential to participate in Title I, the need to adhere to applicable federal laws such as the Civil Rights and Age Discrimination laws if participating in Title I and the need to have a consultation meeting with the district if the private school decides to participate in Title I. The district is required to maintain records to show a good faith effort to invite the private schools to participate in Title I support. (See sample agenda and letter to Private School Headmaster with return participation documentation at the end of this section.)

Consultation

Annually an LEA must contact officials of private schools with children who reside in the LEA regardless of whether the private school they attend is located in the LEA. One way to accomplish this is for the LEA to extend an invitation to officials of the private schools and convene a meeting with them at which LEA officials explain the intent of Title I and the roles of public and private school officials and provide opportunities for the private school officials to ask questions. It is not adequate consultation merely to send a letter to officials of the private schools explaining the intent of Title I. (It is appropriate to send a letter by certified mail return-receipt requested to initially offer services, but a meeting must also be offered.)

A unilateral offer of services by an LEA with no opportunity for discussion is not adequate consultation. Only after discussing key issues relating to the provision of Title I services should the LEA make its final decisions with respect to the Title I services to be provided to eligible private school children, their teachers, and their families.

Consultation by an LEA must include meetings between the LEA and appropriate private school officials and must occur before the LEA makes any decision that affects the opportunity for eligible private school children, their teachers, and their families to participate in Title I programs. For example, if the LEA signs teacher contracts or orders supplies and equipment for the Title I program in the spring, the LEA must consult with the appropriate private school officials before signing those teacher contracts with Title I teachers or ordering supplies and equipment to provide Title I services for private school students.

An LEA must meet with appropriate private school officials throughout the implementation and assessment of Title I services. This consultation must include early discussions to prepare for the next school year so that there is a timely start of the Title I program at the beginning of each school year, and throughout its implementation and assessment of services.

Under §200.63 of the Title I regulations, consultation must, at a minimum, address the following issues:

- how the LEA will identify the needs of eligible private school children;
- what services the LEA will offer to eligible private school children;
- how and when the LEA will make decisions about the delivery of services;
- how, where, and by whom the LEA will provide services to eligible private school children;
- how the LEA will assess academically the services to private school children in accordance with §200.10 of the Title I regulations, and how the LEA will use the results of that assessment to improve Title I services;
- the size and scope of the equitable services that the LEA will provide to eligible private school children and, consistent with §200.64 of the Title I regulations, the proportion of its Title I funds that the LEA will allocate for these services and the amount of funds that the LEA reserves from its Title I allocation for the purposes listed in §200.77 of the Title I regulations;
- the method, or the sources of data, that the LEA will use (under §200.78 of the Title I regulations) to determine the number of private school children from low-income families residing in participating public school attendance areas, including whether the LEA will extrapolate data if a survey is used; and
- the services the LEA will provide to teachers and families of participating private school children.

Consultation must also include:

- Discussion of service delivery mechanisms the LEA will use to provide services; and

- Thorough consideration and analysis of the views of the private school officials on whether the LEA should contract with a third-party provider. If the LEA disagrees with the views of the private school officials on that issue, the LEA must provide in writing to those officials the reasons why the LEA has chosen not to use a third-party contractor.

Affirmation Letter

Each LEA must maintain and provide to the state educational agency (SEA) a written affirmation, signed by officials of each private school with participating children or appropriate representatives of the private school officials that the required consultation has occurred.

The affirmation should be signed when consultation on the planning and design of the next year's program has been completed. The exact timing of signing the affirmation should be a consultation topic. The SEA has the flexibility to require LEAs to submit the written affirmations during the annual Title I application process or at another time. After the affirmation is obtained, consultation continues through the implementation and assessment of services. (A copy of the affirmation letter to be signed by district and private school officials is provided at the end of the section.)

Equitable Services

A district must, after timely and meaningful consultation with appropriate private school officials, provide Title I educational services to private school children who live in participating public school attendance areas and are identified by the LEA as at risk of failing. These services must be equitable in comparison to services and benefits provided to public school participants [Section 1120 (a) of NCLB].

If the district reserves funds to provide instructional and related activities for public elementary and secondary school students at the district level, the district must also provide from those funds, equitable services to eligible private school children. The amount of funds available to provide equitable services from the district set-aside(s) must be proportionate to the number of private school children from low-income families residing in participating public school attendance areas (examples of district set-asides that would require equitable private school services: parental involvement, professional development, summer school). Equitable services do not apply to pre-K, district improvement, supplemental services or school choice set-asides.

If a district reserves Title I funds according to Section 1119 of NCLB for teachers and paraprofessionals to become highly qualified or reserves funds for other professional development needs (not to include the 10 percent set-aside for district improvement), the district must provide equitable services to teachers of private school participants from these

reservations. The professional development activities for private school teachers should address how the teachers can serve Title I students better, such as by providing information on research-based reading and mathematics instruction. However, the district is responsible for providing professional development activities for Title I teachers who are employees of the district, including the Title I teacher that provides services to private school children. For specific examples of reservations for equitable services, see “Eligible School Attendance Areas” examples 1, 2 and 3 of this manual.

Determining the Number of Low-Income Private School Children

A district is allowed to calculate the number of private school children who are from low-income families in several ways:

1. Using the same measure of poverty as the district uses - in rare instances private schools offer free-and reduced-priced lunches. In these few cases low-income private school students could be determined by the number of students receiving free- and reduced-priced lunches.
2. Using comparable data from a different source – in many instances districts create a survey that looks similar to the USDA free-and reduced-priced lunch form. In creating this survey, the income threshold must be the same as the form used to determine low-income students in the public schools.
3. Using comparable data and extrapolating if complete data is not available – a district may use a survey as described in number two above. However, if all surveys are not returned, a district after obtaining income data from a representative sample of families may extrapolate those data to the entire private school student population, if complete actual data are unavailable. The district should ensure that the data are representative of the private school students in the district.
4. Using proportionality – a district may apply the low-income percentage of each participating Title I school to the number of private school children who reside in that school attendance area. To do this, a district will need the addresses and grade levels of those students attending private schools that are participating in the Title I program.

Note: The only information a district needs to collect for determining low-income students in private schools is the:

1. address to determine residence in a participating Title I school attendance area;
2. grade level of each child; and
3. income level of parents (for 1-3 above).

Providing Equitable Services

Example from *USED Guidance*

An LEA reserves 1 percent ($60,000) of its Title I allocation of $6,000,000 for parental involvement activities. The number of public and private school children from low-income families residing in participating Title I attendance areas is 25,000. Five percent (1,250) of the 25,000 children attend private schools; thus 5 percent of the $60,000 reservation, or $3,000, is available for equitable services for parents of private school participants. The parent involvement program funded by Title I must meet the needs of the parents of private school participants. After consultation with the appropriate private school officials, the LEA may conduct these activities independently or in conjunction with the LEA's regular parent involvement activities.

Expenditures of funds made available under Title I for services for private school children in the aggregate must be equal to the amount of funds generated by private school children from low-income families. Before determining equal expenditures, the LEA shall reserve, from the LEA's whole allocation, funds needed to carry out §200.27 of the regulations (district set-asides). The LEA shall also reserve the amounts of funds generated by private school children under §200.28 of the regulations.

The services that an LEA provides to eligible private school children must also be equitable in comparison to the services and other benefits provided to public school children under Title I.

Services are equitable if the LEA:

- addresses and assesses the specific needs and educational progress of eligible private school children on a comparable basis as public school children.
- meets the equal expenditure requirements.
- provides private school children with an opportunity to participate that
  - is equitable to the opportunity provided to public school children; and
  - provides reasonable promise of those children achieving the high levels called for by the state's student performance standards.

Approval of Application

The SEA does not consider for approval an application for a Title I program that does not provide opportunity for appropriate participation of private school children. As a means of demonstrating appropriate consultation and involvement of private school officials, districts should maintain appropriate documentation such as minutes of meetings, written correspondence, surveys, and so forth. Consultation with the private school officials must occur before important decisions are made during all phases of the design and development of the project.

Each LEA must maintain and provide to the SEA a written affirmation, signed by officials of each private school with participating children or appropriate representatives of the private school officials that the required consultation has occurred. During the consultation process between the district and private school officials, the district must inform the private school officials of the equitable service reservation amounts. Each LEA must submit and provide to the SEA an equitable services worksheet (see worksheet at the end of this section) showing appropriate amounts of reservations to serve the parents and teachers of participating private schools children and for educational services for eligible private school children.

Eligible Children

Student eligibility for Title I services for private school children is determined by (1) residence in a participating public school attendance area and (2) educational need. Poverty (free and reduced lunch status) is not a criterion. To be eligible for Title I services, a private school child must reside in a participating public school attendance area and must meet the requirements in Section 1115(b) of NCLB, which requires the LEA to use multiple, educationally related, objective criteria in selecting children to participate in the Title I program. Under that section, certain children may be identified as eligible solely by virtue of their status (examples are homeless children and children who in the preceding two years had participated in Head Start, Even Start, Early Reading First, a Title I preschool program, or a Title I, Part C [Migrant Education program]). Children from preschool through grade two are selected solely on the basis of such criteria as teacher judgment, interviews with parents, and developmentally appropriate measures.

In consultation with private school officials, an LEA must establish multiple, educationally related, objective criteria to determine which private school children are eligible for Title I services, and, within the eligible group, which children will be served. To the extent appropriate, the LEA must select private school children who are failing, or most at risk of failing, to meet high student academic achievement standards.

Educationally related criteria may include:

- achievement tests;
    - teacher referrals and recommendations based on objective, educationally related criteria; and
- grades.

In this example, eligible public school attendance areas are identified and ranked on the basis of the number of children from low-income families attending public schools.

Public school attendance area	Column A Per pupil allocation (PPA) by attendance area	Column B Number of public school low-income children by attendance area	Column C Number of private school low-income children by attendance area	Column D Total allocation for each public school [Col. A X Col. B]	Column E Amount available for Title I services to private school children [Col. A X Col. C]
A	$800	500	130	$400,000	$104,000
B	$700	300	8	$210,000	$5,600
C	$600	200	3	$120,000	$1,800
D	$500	400	17	$200,000	$8,500

Administrative Costs

EXAMPLE OF THE STEPS AN LEA USES TO SELECT PARTICIPANTS:

District and private school officials decide that the criteria for private school students are (1) test scores on a national norm-referenced test given annually by the private school and (2) teacher judgment. The criteria should provide accurate and unduplicated information. The private school principal provides the names, addresses, and grades of the private school children meeting the agreed upon criteria. The district checks the addresses of the children on the list to determine those who live in participating public school attendance areas. Based on established educational criteria, the district then selects, from among those who are eligible and live in participating public school attendance areas, those private school children who are failing, or those who are most at risk of failing, to meet high achievement standards.

An LEA may reserve an amount that is reasonable and necessary to administer Title I programs for both public and private school children, including special capital expense costs. This reservation for administration, including funds needed to administer Title I programs for private school students, is taken "off-the-top" of the LEA's allocation and not from the funds allocated for Title I services for private school children. Funds for instructional services are allocated after administrative and other “off-the-top” costs are determined.

Special capital expenses refer to expenditures for non-instructional goods and services that were or are still being incurred as a result of implementing alternative delivery systems such as the following:

- Purchase or lease of real and personal property (including mobile educational units and neutral sites);
- Insurance and maintenance costs;
- Transportation between a private school and another site;
- Buy-out leases for mobile vans or neutral space or other costs relating to terminating arrangements for providing Title I services to private school children outside of their private school; and
- Other comparable goods and services, which include costs to escort children to and from instructional areas and, in the case of computer-assisted instruction, costs to install equipment and pay for non-instructional computer technicians. (Note: Technicians perform non-instructional duties, such as operating and maintaining computer equipment and keeping order in a Title I CAI classroom. Whether employees should be considered, Title I instructional personnel or non-instructional technicians depend on the functions performed by the employees in addition to their job titles or classifications.)

Under §200.77(f) of the Title I regulations, these special capital expenses costs must be considered administrative costs and taken off the top of the LEA’s total Title I allocation.

Affirmation of Consultation with Private School Officials

Section 1120(b) of the No Child Left Behind Act and §200.63 of the Title I regulations require that timely and meaningful consultation occur between the local education agency (LEA) and private school officials prior to any decision that affects the opportunities of eligible private school children, teachers, and other educational personnel to participate in programs under this Act, and shall continue throughout the implementation and assessment of activities under this section.

The following topics must be discussed during the ongoing consultation process:

- how the LEA will identify the needs of eligible private school children;
- what services the LEA will offer to eligible private school children;
- how and when the LEA will make decisions about the delivery of services;
- how, where and by whom the LEA will provide services to eligible private school children, including a thorough consideration and analysis of the views of the private school officials on the provision of services through a contract with a third-party provider;
- how the LEA will assess academically the services to eligible private school children in accordance with §200.10 and how the LEA will use the results of that assessment to improve Title I services;
- the size and scope of the equitable services that the LEA will provide to eligible private school children and, consistent with §200.64, the proportion of funds that will be allocated to provide these services;
- the method or sources of data that the LEA will use under §200.78 to determine the number of private school children from low income families residing in participating public school attendance areas, including whether the LEA will extrapolate data, if a survey is used;
- the equitable services the LEA will provide to teachers and families of participating private school children; and
- if the LEA disagrees with the views of the private school officials on the provisions of services through a contract, the LEA must provide the private schools the reasons in writing why the LEA chooses not to use a contractor.

We agree that timely and meaningful consultation occurred before the LEA made any decision that affected the participation of eligible private school children in the Title I, Part A program.

_____ _____

Public School Official Date Private School Representative

_____ _____

School District Date Name of Private School Agency or School

Title I Equitable Services Worksheet

(used to determine equitable services for participating private schools)

Calculate the proportion of participating private school students from low income families residing in an attendance area to the total number of participating public and private school students from low income families residing in an attendance area. Complete one form for each private school.

Number of private school children from low income families who would have attended a public Title I school*	/	Number of children from low income families in public and private schools participating in Title I*	Proportion of set aside for private schools
_____	/	_____	= _____

Apply the above proportion to the following fund sources:

A. Instructional Program Funds

Calculate the portion of the instructional program(s) funds in the district set aside (do not include pre-school programs, choice or supplemental educational services) to be allocated to the participating private schools.

Proportion of set aside (from above calculation)	X	District set aside for instructional programs	=	Additional funds allocated to the participating private school
_____	X	$_____	=	$_____

B. Parental Involvement Funds

Calculate the portion of parental involvement funds in district set-aside to be allocated to the participating private schools.

Proportion of set aside (from above calculation)	X	District set aside for instructional programs	=	Additional funds allocated to the participating private school
_____	X	$_____	=	$_____

C. Professional Development Funds

Calculate the portion of professional development funds (include funds set aside to assist teachers and paraprofessionals to reach highly qualified status, exclude the 10 percent set aside for districts in improvement) in district set-aside to be allocated to participating private schools.

Proportion of set aside (from above calculation)	X	District set aside for instructional programs	=	Additional funds allocated to the participating private school
_____	X	$_____	=	$_____

Title I Private School Participation Meeting
June 8, 2006
4:00 p.m.

Agenda

Welcome and Introductions

Purpose of Meeting

Explanations – Title I & Private School Participation

Federal Law

Questions and Discussions

Refreshments & Adjournment

Board Conference Room

Rock Hill School District Office

660 N. Anderson Road

Rock Hill, South Carolina 29730

Horry County Schools

1605 Horry Street

Conway, SC 29528

488-6809

MEMO TO: Headmaster

Private School

Address

City/State/Zip

FROM: Barbara Harrelson

Executive Director of Federal Programs

SUBJECT: Title I Private School Participation

VIA: U.S. Mail: Certified Mail, Return Receipt

DATE: March 12, 2007

The No Child Left Behind Act of 2001 (NCLB) amended the Elementary and Secondary Education Act of 1965 (ESEA). The amendments contained in this statute included the reauthorization of Title I. The Title I program of NCLB provides supplementary educational services for eligible public and private school students to assist those children in acquiring the knowledge and skills necessary to meet the challenging student performance standards that all children are expected to meet.

Section 1120 of Title I requires that a local education agency (LEA) provide eligible private school children with Title I educational services or other benefits that are equitable to those provided to eligible public school children. Title I services for eligible private school children must be developed in consultation with private school officials. Enclosed for your review is a copy of the Title I law relative to private school participation.

If your school is eligible for Title I funds and you wish to begin the process of confirming this designation in order to participate in the 2007-2008 Title I program for Horry County Schools, please complete the check-off portion of the attachment and fax it to Barbara Harrelson at 488-6982 by 4:30 p.m., Friday, March 23, 2007.

A meeting for interested private school participants will be held on Wednesday, March 28, 2007, from 9:00 a.m.-11:00 a.m. The meeting will take place in Room 5 at the Horry County School district Office at 1605 Horry Street. During this time, issues related to private school participation, planning, and local, state and federal monitoring will be discussed. Time will be provided for questions.

Your immediate attention to this information is needed. Failure to comply with these deadlines will result in exclusion of your school from the FY2008 Title I project and your next opportunity to participate will not be until the FY2009 project.

I look forward to seeing you on March 28.

Civil Right Certificate

Assurance of Compliance with the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, Title IX of the Education Amendments of 1972, and the Age Discrimination Act of 1975.

This applicant assures that it will comply with:

1. Title V of the Civil Rights Act of 1964, as amended, 42 U.S.C. et seq., which prohibits discrimination on the basis of race, color, or national origin in programs and activities receiving federal financial assistance.

2. Section 504 of the Rehabilitation Act of 1973, as amended, 29 U.S.C. 794, which prohibits discrimination on the basis of handicap in programs and activities receiving federal financial assistance.

3. Title IX of the Education Amendments of 1972, as amended, 20 U.S.C. 1681et seq., which prohibits discrimination on the basis of sex in education programs and activities receiving financial assistance.

4. The Age Discrimination Act of 1975, as amended, 42 U.S.C. 6101 et seq., which prohibits discrimination on the basis of age in programs or activities receiving federal assistance.

5. All regulations, guidelines, and standards lawfully adopted under the above statues by the United States Department of Education.

The applicant agrees that compliance with this Assurance constitutes a condition for the participation of children enrolled in this private school in an ESEA Title I program, and that it is binding upon the applicant, its successors, transferees, and assignees for the period during which such assistance is provided. In the event of failure to comply, the applicant understands that assistance can be terminated and applicant denied the right to receive further assistance. The applicant also understands that the Department of Education may at its discretion see a court order requiring the compliance with the terms of the Assurance or seek other appropriate judicial relief.

The person or persons whose signature(s) appears(s) below is/are authorized to sign this application, and to commit the applicant to the above provisions.

_____	_____
Date	Director/Principal/Headmaster Signature
_____	_____
Phone	
	_____

Fax to: Barbara Harrelson

Horry County Schools

Executive Director of Federal Programs

843*488-6982

FROM: <Private School>

<Headmaster>

Please check the correct statement:

_____ We wish to participate in the FY2008 Title I project and will attend the orientation meeting for private schools on March 28, 2007, from 9:00 a.m. – 11:00 a.m. at Horry County Schools District Office, Room 5.

_____We do not wish to participate in the FY2008 Title I Project.

<Private School>

_____

Director/Principal/Headmaster Signature

_____

Date

Title I
Public School Choice

Title I Non-Regulatory Guidance: C:\Users\JStanley\Desktop\Rules and Regs 2013\Title I Guidance\Public School Choice Guidance 2009.pdf http://ed.sc.gov/agency/programs-services/77/documents/School_Choice_Guidance.pdf

ESEA Flexibility Waiver:
http://ed.sc.gov/agency/lpa/documents/South_Carolina_ESEA_Waiver_request_Final.pdf

Public School Choice

Priority and focus schools have been identified due to the percent of students not performing at proficient levels or based on the performance gap among sub-groups of students. When schools do not meet state targets for improving the achievement of all students, parents must be given the opportunity to transfer their children to a school that has not been so identified.

Districts receiving funds under Title I are required to make choice available to all students in qualifying schools. Students who are enrolled in Title I schools are eligible to transfer to another school if their school has been identified as a school in improvement. Under the ESEA Waiver, schools identified as priority or focus schools must offer choice. The district is responsible for paying all or a portion of the transportation necessary for students to attend their new schools, subject to the limitations discussed in the guidance on Public School Choice items J-5 and J-11.

Timing and Duration of Choices

Public school choice is required in all priority and focus schools.

A district must make public school choice available to eligible students:

Sufficiently in advance of, but no later than 14 calendar days before the first day of school following the school year in which the district administered the assessments that resulted in the school being identified as in need of school improvement, corrective action, or restructuring. If possible, a district should notify parents about their available choices well before the beginning of the school year in which those choices will be available.

A district must offer choice to all students in an eligible Title I school until the school is no longer identified. A priority or focus school will continue to be designated as such until the school's subgroup performance meets or exceeds the annual AMO goal(s) for two consecutive years.

If an eligible student exercises the option to transfer to another public school, a district must permit the student to remain in that school until he or she has completed the highest grade in the school. However, the district is no longer obligated to provide transportation for the student after the end of the school year in which the student's school of origin is no longer identified as a priority or focus school.

Additional Help for Successful Public School Choice Implementation:

See the USDE publications**:**

- *Creating Strong District School Choice Programs*
  http://www2.ed.gov/admins/comm/choice/choiceprograms/report.pdf

- *Giving Parents Options: Strategies for Informing Parents And Implementing Public School Choice and Supplemental Educational Services Under No Child Left Behind*
  http://www2.ed.gov/admins/comm/choice/options/givingparentsoptions.pdf

Eligible Students

Eligible students are **all** students except Pre-K enrolled in Title I schools identified as priority or focus. Students are eligible to transfer to another public school (which may be a charter school) that is not in a priority or focus school. This requirement applies whether the school in which a child is enrolled administers Title I as a school-wide program *[Section 1114]* or as a targeted assistance program *[Section 1115].* The only exception applies in situations when there are no other schools in the district (or outside the district) to which students could transfer.

All students must include students with disabilities and those eligible under Section 504 the opportunity to be educated in a school that has not been identified as a priority or focus school if nondisabled students have that option. The LEA should match the abilities and needs of a student with disabilities with those schools that have the ability to provide the student with a Free and Appropriate Public Education (FAPE). Therefore, school choice options may differ from the options given to nondisabled students.

In the case of a school that operates a targeted assistance program, all students in the school, not just those receiving Title I services, must have the opportunity to change schools.

The district must give *all* students in a school identified as a priority or focus school the opportunity to transfer to another public school. In implementing this option to transfer, however, there may be circumstances in which the district needs to give priority to the lowest-achieving children from low-income families. For example, if not all students can attend their first choice of schools, a district would give first priority in assigning spaces to the low-achieving and low-income students. Similarly, if a district does not have sufficient funding to provide transportation to all students who wish to transfer, it would apply this priority in determining which students can receive transportation.

Notification to Parents

Parental Notification **must**:

- Provide an explanation of the public school choice option to all parents whose children are enrolled in a Title I school identified as priority or focus.
- Inform parents that their child is eligible to attend another public school and may receive transportation to the school;
- Identify each public school, which may include charter schools, that parents may select;

- Include information on the academic achievement of the schools that parents may select;
- Describe the procedures and timelines parents must follow in selecting a school;
- Provide an explanation of how transportation to the new school will be provided and, if necessary because of insufficient funds to accommodate all children, include information on how the district will set priorities in order to determine which eligible students received transportation;
- Explain how parents are communicate their choices using standard mail, fax, or Internet, etc.;
- Inform parents of how they will receive confirmation that their communication regarding choice has been received; and
- Provide the name, phone number, and an e-mail address of a designated person whom parents may contact if they have questions.

The district should also include an explanation of why the choices made available to parents may have been limited.

This notification **must** be in a comprehensive, easy-to-understand format and, to the extent practicable, in a language the parents can understand.

In addition to mailing notices directly to parents, the district **must** provide information about choice through broader means, including the newspapers, posters, and the Internet.

The district **shall** set a reasonable deadline by which parents must respond to the opportunity to have their children attend another public school. The district **must** ensure that the parents have sufficient time and information to make an informed decision about selecting a school.

If there are no schools to which students can transfer because (1) all schools are identified as a priority or focus school ; (2) there is only one school in the district; and (3) the rural or isolated nature of the district prevents choice, the district still **must** notify parents that their child's school is identified as priority or focus and that the child is eligible for choice, but that no choices are currently available.

A district cannot prohibit public school choice due to:

- Lack of capacity;
- Local transfer policies that prohibit choice;

- Voluntary, court-ordered desegregation plans; and
- Health and safety concerns, including overcrowding problems.

A district **must** offer more than one choice to eligible students, if more than one school is eligible to receive students. The fullest possible menu of school choices should be offered to parents. The district has flexibility under the statue to determine which schools, among those not identified as priority or focus, will comprise the range of alternatives for students to transfer.

If all schools within a district to which a child may be transferred are identified as a priority or focus school, the district **must** to the extent practicable, establish cooperative agreements with other districts (or with charter and virtual schools) that are willing to accept its students as transfers.

While the final decision on which school the child attends is up to the district and while not all parents will necessarily receive their first choice of schools, districts **must** take parents' preferences into consideration in making those decisions. Again, districts **must** give priority to the lowest-achieving eligible children.

A district **must** offer students with disabilities and those eligible under Section 504 of IDEA, the opportunity to be educated in a school that has not been identified as a priority or focus school. However, students with disabilities do not have to be offered their choice of the same schools as offered to nondisabled students. A district **must** ensure that students with disabilities receive a free appropriate public education.

Timeline for parents when considering their choice options:

A district might set different timelines for parents to make their decisions on choice, depending on the circumstances in the district and its schools. For example, the district might permit parents to exercise choice at various times during the school year (e.g., in the spring of the prior school year, at the beginning of the school year, and at the beginning of the second semester). Alternatively, the district may establish a "window" during which parents must exercise their choice option. Whatever the case, the district must set a reasonable deadline by which parents must apply and ensure that the parents have sufficient time and information to make an informed decision about selecting a school. The district should work with parents to ensure that they have ample information and time to take advantage of the opportunity to choose a different public school for their child.

Funding issues

A district **must** pay for or provide choice related transportation to the new school of choice.

A district may use Title I funds, as well as any other allowable federal, state, local and private resources to pay for choice-related transportation required to implement school choice.

Districts with priority schools **must** set aside 20 percent of their Title I funds for SES and choice unless a lesser amount is approved by the Office of Federal and State Accountability. *(see page 109 of the ESEA Flexibility Waiver)*

Districts with focus schools **must** set aside 10 percent of their Title I funds for SES and choice unless a lesser amount is approved by the Office of Federal and State Accountability. *(see page 109 of the ESEA Flexibility Waiver)*

If a district does not already directly provide for transportation to and from schools, it must provide transportation for students wishing to transfer. However, a district may be permitted to make alternative arrangements for providing transportation, such as reimbursing parents for the cost of providing transportation or using city transportation. In addition, the district would not be required to provide transportation to students who live only a short distance from its new school.

A district may establish transportation zones within itself based on the geographical location of the schools. If transportation zones are developed, they should be drawn to provide genuine choice and address only issues of geographic distance. If this cannot be done, students must be given the opportunity to attend schools outside their zone or residence and provided with transportation.

Policy

To provide parents with a sufficient number of high-quality public school choice options, the South Carolina Department of Education will allow, but not require districts to use a non-Title I school that has not met AYP for two or more years as a school of choice. If a district offers this option to parents, the district must (as required by NCLB legislation) provide parents with detailed information on the academic achievement of such schools, including why these schools missed AYP.

Public School Choice Frequently Asked Questions

What is public school choice?

The purpose of public school choice is to offer a student enrolled in a Title I school that is in need of improvement an opportunity to attend another school, even as his/her school is undergoing improvement, so that he/she doesn't fall further behind while the school is improving. Local Education Agencies (LEAs) that receive Title I funds must offer all students enrolled in a Title I school identified as high priority the option to transfer to another public school within the LEA that has not been identified as High Priority.

Where may a student transfer as provided under public school choice?

The school a student chooses to attend under this provision cannot be a high priority school. The regulations add that the school of choice cannot include a school that has been identified by the state as persistently dangerous under Title IX of NCLB . Transfer options may include public charter schools. Schools of choice are not required to be schools that receive Title I funds.

When did the requirement to offer public school choice go into effect?

Public school choice was first required to be provided to students in identified schools during the 2002-2003 school year. The state is required to report annually on the number of students and schools involved in choice.

What students are eligible for public school choice?

All students enrolled in a priority or focus Title I school must be offered the opportunity to transfer to a school that is performing adequately (if there are other schools available). The statue states that in providing students the option to transfer to another public school, the LEA “shall give priority to the lowest achieving children from low-income families.” This priority requirement applies when honoring the choices of parents for the schools to which they wish to transfer their child and to receiving transportation. Priority is established on availability of funds and given to the lowest achieving children from low-income families.

How will parents know if their child may be eligible to transfer to a new school under public school choice?

It is the responsibility of the LEA to notify parents if their child's school is identified as high priority and which schools of choice are available for transfer as soon as the school is identified by the state. If more than one school in the LEA meets the requirement for receiving students, parents should be offered at least two choices, and the LEA should take into consideration the parent's preference. However, the final assignment of a choice school is made by the LEA.

What are some considerations for receiving schools?

Once enrolled, a student must be eligible for participation in all aspects of the school, including enrollment in classes and participation in co- or extracurricular activities. Athletic participation of students who transfer under public school choice provisions would comply with the same policies as those in place for any other transfer. If specialty or magnet schools are a choice option, the school need not disregard the entrance requirements. For students with disabilities who have an individualized education plan (IEP), the new school may use the previous IEP or write a new one. Moving to a choice school does not constitute a change in placement per the Individuals with Disabilities Education Act (IDEA) guidelines.

How long public school choice must be offered?

The LEA must offer public school choice to all students in an eligible Title I school until that school is no longer identified as a priority or focus school. Once a student transfers, he/she must be permitted to remain at the school of choice until he/she completes the highest grade there. However, the LEA is no longer obligated to provide transportation when the student's school of origin is no longer identified as priority or focus.

What funds are available for offering public school choice?

Unless a lesser amount is needed, the LEA can spend up to an amount equal to 20 percent of its Title I, Part A NCLB allocation on priority schools for choice-related

transportation, supplemental educational service or a combination of the above. Focus schools will be required to set aside 10 percent of its Title I, Part A NCLB allocation unless a lesser amount is needed.

Example of “Choice Letter”:

Dear Parents,

The (Sample County School District) is committed to providing a quality education for every child attending our schools. (SCSD) aims to ensure that parents have access to all available resources that support and strengthen the academic achievement of their children. According to the *No Child Left Behind Act of 2001* (NCLB) and South Carolina's ESEA Flexibility Waiver, an opportunity must be provided to your child to attend another school within the school district or possibly a neighboring district if your child is enrolled in a Title I school identified as a priority or focus school. A school is identified as a priority and focus due to the percent of students not performing at proficient levels or the performance gap among sub-groups of students. (Sample Elementary School) has a performance gap between male and female students scoring at the proficient level in mathematics; therefore, has been identified as a "Focus School" and must offer Public School Choice, the opportunity for you to transfer your child to another school.

If requested, the school district will provide transportation to the school of choice. However, funds for choice transportation are limited. Should the request for choice transportation exceed the amount of funds made available by federal law, student transfers based on choice will only be granted for a limited number of students within the transportation cost allowance, with priority being given to those students with the greatest instructional need.

Attached to this letter you will find a list of the schools to which your child may transfer (receiving schools). Information about the academic achievement of the receiving schools is also provided.

Please complete the attached School Choice Transfer Form and return it to (designated person/location) by (designated date). You will receive a written confirmation that your request has been received. You will also receive written notification by (date) of the school to which your child has been transferred.

You will also find all of the information about School Choice on the Sample County School District website at www.scsd.com. If you have questions regarding Choice procedures, you may contact (person) at (phone number and email address). He/she will be more than happy to assist you.

Other items that need to be addressed

- Include the choices of schools that the students will be allowed to transfer to. You will also want to compare the school identified as priority or focus to the schools that these students will be allowed to transfer (i.e., assessment data, etc.). Please make sure the schools that are selected as schools of choice include the grade in which the student is currently enrolled, and that the schools of choice cannot be schools currently identified as priority or focus
- If there are no schools to which the students can transfer (i.e. one school per grade span, or all schools in the district are identified as priority or focus), this needs to be stated in the letter.

A district is required to prominently display on its Web site the following information regarding Public School Choice:

- Beginning with data from the 2007–2008 school year, and for each subsequent school year, the number of students who were eligible for and participated in the public school choice option; and
- For the current school year, a list of available schools (in district, charter, other district, or virtual) to which students eligible to participate in public school choice may transfer.

The district might also consider including on its Web site:

- The list of schools with students eligible for public school choice;
- Information on the academic achievement of the schools from which the parents may choose along with information on other special programs and activities the schools may have;
- Procedures and timelines that parents must follow in selecting a school for their child;
- How transportation will be paid for or provided;
- The amount equal to 20 percent of the district's Title I, Part A allocation for priority schools and 10 percent of the allocation for focus schools;

- District and school contact information for parents to use if they have additional questions or need more information; and
- A link to a downloadable form for parents to use to request to transfer their child to another school.

NCLB Cooperative Agreements (E-10, 11)

A number of districts may have no schools available to which students can transfer under NCLB Public School Choice. This situation may occur when:

- All schools at a grade level are in school improvement;
- A school district may have only one school per grade span;
- Schools are so remote from one another that choice is impracticable.

In these cases, districts **must**, to the extent practicable, enter into a **cooperative agreement** with other districts in the area, or with charter or virtual schools in the state that can accept students as transfers.

The Process for Entering into a Cooperative Agreement

If your district is unable to offer choice, the district must make an effort to enter into a cooperative agreement with other districts in the area.

1. Determine which district(s) will be able to accommodate student transfers.
2. Send written correspondence to the identified district(s) requesting to enter into cooperative agreements with them to accept NCLB student transfers.
3. Secure documentation that the identified district did or did not choose to enter into a cooperative agreement with your district.

Sample Letter Requesting a Cooperative Agreement

(Date)

Dear (Name of Title I Director or Superintendent),

(Abbott County School District) does not currently have any schools that can accept students under NCLB Public School Choice. (Abbott County School District) would like to enter into a cooperative agreement with you to accept students from our district for choice. Indicate below whether you will or will not accept students from our district, and please return this form to the address listed below.

Sincerely,

(Name of Title I Director or Superintendent)

(Address)

(Phone)

(Email)

☐ Rykard County School District **will** enter into a cooperative agreement with Abbott County School District to accept NCLB transfer students.

☐ Rykard County School District **will not** enter into a cooperative agreement with Abbott County School District to accept NCLB transfer students.

Signature(s): _____

Superintendent Date

_____

Title I Director Date

Supplemental Educational Services

Title I Non-Regulatory Guidance: C:\Users\JStanley\Desktop\Rules and Regs 2013\Title I Guidance\SES Guidance 2009.doc http://ed.sc.gov/agency/programs-services/77/documents/SES_Guidance.pdf

ESEA Flexibility Waiver:

Supplemental Educational Services

Supplemental educational services (SES) are defined as tutoring and other supplemental academic enrichment services that are in additional to the instruction during the school day. These services, which are not provided during the regular school day, must be of high quality, research-based, and specifically designed to increase the academic achievement of participating students.

Title I of the *No Child Left Behind Act of 2001* (NCLB) requires districts to arrange for the provision of supplemental educational services for eligible students in schools that are in the second year or more of the Title I school improvement (Continuing School Improvement, Corrective Action, Plan to Restructure, or Restructure). An eligible child is a child from a low-income family (In South, these are free and reduced lunch students.) Supplemental educational services are selected by the parents of eligible students for the purpose of ensuring that eligible students increase academic achievement in reading, language arts, and math.

South Carolina Elementary and Secondary Act Flexibility Waiver

The U.S. Department of Education (Department) offered States the opportunity to request flexibility from certain requirements of the Elementary and Secondary Education Act of 1965 (ESEA), as amended by the No Child Left Behind Act of 2001. As part of the flexibility waiver granted to South Carolina, schools that were identifies as “Schools in Improvement” based on AYP results are now classifies as Reward for Performance Schools, Reward for Progress Schools, Priority Schools and Focus Schools.

Under South Carolina’s ESEA Flexibility Waiver Federal Accountability System:

Priority Schools are identified as the lowest performing Title I schools.

- Priority schools are determined by ranking each Title I school’s total weighted composite index score (which determines the school’s letter grade) from lowest to highest.
- SES will be offered to all students in the school.

Primary schools, which do not have grades that are tested by the state assessments, are not included in the ranking for Priority Schools.)

Focus Schools are identified as Title I schools with the highest average performance gap between subgroups.

- To determine performance gaps, each subgroup's performance is compared with the corresponding non-subgroup comparison group. For example, the performance of Limited English Proficient (LEP) students will be compared to the performance of non-LEP students.
- SES will be offered to students who did not score proficient or above on one of the state assessments and will be offered to students in the lowest performing subgroup(s).

Each subgroup achievement gap difference will be calculated, averaged, and ranked to determine the Title I schools with the highest average achievement gap.

South Carolina Department of Education (SCDE) responsibilities include:

The SCDE shall

- promote maximum participation by providers to ensure, to the extent practicable, that parents have as many choices as possible, in consultation with local educational agencies, parents, teachers, and other interested members of the public;

- develop and apply objective criteria to potential providers that are based on a demonstrated record of effectiveness in increasing the academic proficiency of students in subjects relevant to meeting the state academic content and student achievement standards;

- maintain an updated list of approved providers across the state, by school district, from which parents may select;

- develop, implement, and publicly report on standards and techniques for monitoring the quality and effectiveness of the services offered by approved providers, and for withdrawing approval from providers that fail, for two consecutive years, to contribute to increasing the academic proficiency of students served; and

- provide annual notice to potential providers of SES of the opportunity to provide services and of the applicable procedures for obtaining approval from the SCDE to be an approved provider of those services.

District Responsibilities

Each local agency subject to this subsection shall provide, at a minimum, annual notice to parents (in an understandable and uniform format and, to the extent practicable, in a language the parents can understand) of

- the availability of services;
- a description of procedures and timelines that parents must follow in selecting a provider to serve their child.
- the identity of approved providers of those services that are within the local educational agency or whose services are reasonably available in neighboring districts; and
- a brief description of the services, qualifications, and demonstrated effectiveness of each such provider.

If requested, the district shall assist parents in choosing a provider from the list of approved providers maintained by the state.

The district shall apply fair and equitable procedures for serving students if the number of spaces at approved providers is not sufficient to serve all students.

The district shall not disclose to the public the identity of any student who is eligible for, or receiving, supplemental educational services without the written permission of the parents of the student.

The Contractual Agreement

In the case of the selection of an approved provider by a parent, the local educational agency shall enter into an agreement with such provider. Such agreement shall:

- develop, in consultation with parents and the provider chosen by the parents, a statement of specific achievement goals for the student, how the student's progress will be measured, and a timetable for improving achievement that, in case of a student with disabilities, is consistent with the student's individualized education program under section 6149d) of the Individuals with Disabilities Education Act;

- describe how the provider will regularly inform the student's teacher(s) of the student's progress;

- provide for the termination of such agreement by the district of the provider is unable to meet such goals and timetables;

- contain provisions with respect to the making of payments to the provider by the district; and

- prohibit the provider from disclosing to the public the identity of any student eligible for, or receiving, supplemental educational services under this subsection without the written permission of the parents of such student.

Criteria for Providers

A provider is a non-profit entity, a for-profit entity, or a local educational agency that

- has a demonstrated record of effectiveness in increasing student academic achievement;

- is capable of providing supplemental educational services that are consistent with the instructional program of the district and the academic standards; and

- is financially sound.

In order for a provider to be included on the state list, a provider shall agree to carry out the following:

- provide parents of children receiving SES under this subsection and the appropriate district with information on the progress of the children in increasing achievement, in a format and, to the extent practicable, in a language that such parents can understand;

- ensure that instruction provided and content used by the provider are consistent with the instruction provided and content used by the district and the SCDE, and are aligned with state student academic achievement standards;

- meet all applicable federal, state, and local health, safety, and civil rights laws; and

- ensure that all instruction and content are secular, neutral, and non-ideological.

Amounts for Supplemental Educational Services

The amount that a district shall make available for SES for each child (pupil funding cap) receiving those services shall be the lesser of

(A) the amount of the district's Title I, Part A allocation, divided by the number children residing within the district aged 5-17 who are from families below the poverty level as determined by the most recent census estimates from the Department of Commerce; or

(B) the actual costs of the supplemental educational services received by the child.

Duration

The district shall continue to provide SES to a child receiving such services until the end of the school year in which such services were first received or until the per pupil allocation cap is spent.

Religious Worship or Instruction

Nothing contained in SES shall permit the making of any payment for religious worship or instruction.

Waiver

At the request of a district the SCDE may waive, in whole or in part, the requirement of this subsection to provide supplemental educational services if the SCDE determines that:

- none of the providers of those services on the list approved by the SCDE makes those services available in the area served by the district or within a reasonable distance of that area; and

- the district provides evidence that is not able to provide those services.

The SCDE shall notify the district, within thirty days of receiving the district's request for a waiver, whether the request is approved or disapproved and, if disapproved, the reasons for the disapproval, in writing.

Annual SES Notice to Parents Checklist

District_____ **School Term**_____

_____ A notice of availability of SES, including who is eligible for services, why services are being offered to low income students at this school, and that the services are free to parents.

_____ The identity of approved providers of those services that are within the local educational agency or whose services are reasonably available in neighboring local educational agencies.

_____ A brief description of the services, qualifications, and evidence of effectiveness for each provider.

_____ Easily understandable, in a uniform format, including alternate formats upon request, and to the extent practicable, in the language the parents can understand.

_____ Description of procedures and timelines that parents must follow in selecting a provider to serve their child (Should include reasonable deadline by which parents must request services, and when and where to return parent enrollment form, and when and how the district will notify parents about enrollment dates and start dates.)

The letter should include:

_____ The district contact for SES, if parents have questions, should be included.

Sample SES Letter
(SHOULD BE PUT ON SCHOOL LETTERHEAD)

Date

Dear Parents,

According to the *No Child Left Behind Act of 2001 (NCLB)*, students receiving free or reduced lunch who attend the Title I schools that have not made adequate yearly progress (AYP) for three consecutive years (referred to as schools in continuing school improvement, corrective action, or restructuring). Your child's school has not met adequate yearly progress (AYP) for three consecutive years and must offer the opportunity to receive supplemental educational services to students receiving free or reduced lunch. Supplemental educational services are free services such as tutoring, remediation, and other educational interventions in reading and/or math.

If you are interested in your child receiving free tutoring services, please complete the attached Request for Supplemental Services form and return it to your school by no later than _____. On the form, please indicate your preference of providers, in rank order, from the list of those approved. To guide you in your decision, one-page summaries of provider's services, qualifications, and effectiveness of each provider has been attached. Also, commonly asked questions and answers about supplemental services as well as questions that you may want to ask the providers have been included so that you can make a decision.

A Provider's Fair will be held on _____ at _____ p.m. in the _____. All providers have been invited to present at this meeting to discuss the services they have to offer. District office and/or school staff will be available at the meeting to answer your questions.

The Request for Supplemental Services form must be returned to your school by _____. You will receive a (letter or a phone call) from (district) by (date) telling you when the free tutoring will start.

Should you have any questions about free supplemental educational serviced, please call the Title I coordinator, _____, at _____ at the school district office.

Enclosures: State-Approved Provider List
Provider Selection Form
Provider's One-Page Summary Pages

SES Enrollment Form

(SHOULD BE PUT ON SCHOOL LETTERHEAD)

REQUEST FOR SUPPLEMENTAL EDUCATIONAL SERVICES

Child's Name: _____

School: _____

Name of Parent: _____

Parent's Contact Information: _____

I would like to request supplemental educational services for my child:

_____ YES

_____ NO

If you marked YES above, please indicate your first choice of providers by noting a "1" by the name of the provider that is your first choice, a "2" by the name of the provider that is your second choice, and so forth.

(DISTRICT SHOULD LIST PROVIDERS APPROVED FOR THE DISTRICT WITH A BLANK FOR PREFERENCE NUMBER.)

I understand that if my child is selected to receive services that I must sign a contract with the district setting instructional goals for my child and allowing the district to pay the provider for the services if my child is to be served.

_____

Parent's Signature

Please mail, fax, or e-mail this form by **(DEADLINE)** to:

NAME OF SCHOOL

MAILING ADDRESS

FAX NUMBER

E-MAIL ADDRESS

Questions that Parents May Want to Ask Supplemental Educational Service Providers

- What programs, by grade levels and subject areas, are available for your child?
- What type of instruction will the tutor use (small group, one-on-one, large group, or the computer)?
- Can the tutor help if your child has disabilities or is a learning English?
- When and where will you provide your instructional services? On the campus of the home school? At a center? Somewhere else other than the two mentioned before?
- What are the qualifications of the tutors? What criteria do you use to select someone to be a tutor?
- What are the company's qualifications?
- Do you have a minimum number of requests for services from parents that you must reach before you will provide supplemental educational services in the school? What is that number? If you do no reach that number, will you inform the parents who have originally requested your services that you will not be able to provide such services in a particular school?
- How many sessions a week are you able to offer services?
- Will you be able to provide services on Saturday?
- What is the student-teacher ratio?

- What if my child needs individual (1:1) attention?
- Will my child be grouped with other children on the same level for instruction?
- Does my child have his/her own individual program?
- What program(s) are offered?
- What happens if we miss a session? Can it be made up?
- How is student progress measured?
- How will you inform me of my child's progress?
- Will my child's teacher(s) be involved?
- Is there homework?
- Is transportation provided by the provider, district, or school?
- As a parent, if I am unhappy with the instructional services that the provider is rendering, am I able to change providers?

Questions and Answers for Parents about Supplemental Educational Services

Who is eligible for supplemental educational services?

Only those students receiving free and reduced lunch and enrolled in school identified for Title I continuing school improvement **(CSI), Corrective Action (CA), Planning for Restructuring (PR), or Restructuring (R)** are eligible to be served.

Under South Carolina's ESEA Flexibility Waiver Federal Accountability System:

All students enrolled in identified Title I **"Priority Schools"** are eligible to be served.

In identified Title I **"Focus Schools**", only those students who *did not meet* grade level standards on any part of the state's assessment and/or students in the lowest performing subgroup(s) are eligible to be served.

Who pays for this service?

The district will use a portion of funds from *No Child Left Behind (NCLB)* to provide these services. If more parents request supplemental educational services than the funds can provide, the district may be required to serve students based on greatest instructional need. Therefore, it is possible not all children will be served.

How much money is available for my child to receive supplemental educational services if my child is served?

The law includes a formula to be used in determining how much money can be used for this purpose. Therefore, the amount per child varies by district. You may contact your district Title I coordinator for the per child cost.

Who will provide services?

The state was required by federal law, to issue a request for proposals at which time interested parties could apply to be a state-approved provider. The state reviewed all applications, selected those that best met the application requirements, and developed a state-approved list of providers that was shared with districts. The list of approved providers for your district is included in this mailing. Based on the state's list of approved providers for the area, parents decide which provider will provide the services.

If my child is approved to receive supplemental educational services, is there any chance the services will be provided by a provider other than my first choice?

Yes, providers stated the maximum number of students they could serve. This is the reason all parents are asked to provide their first, second, and third choices of provider. Your first choice will be honored to the extent possible. However if the requests for a certain provider are greater than the total number of students the provider can serve, your child may be served by a provider indicated as your second or third choice.

How will I know how the provider will meet the instructional needs of my child?

If your child is selected to be served, the district will ask to meet with you and the provider to complete a contract or agreement for services, and the district will ask you to sign the contract/agreement. The purpose of the meeting will be to determine your child's needs, the goals to be met, how the child will be served, when reports will be sent to you about your child's progress, and so forth. Without your signature on this contract, the district will not be able to pay the provider which means your child will not be able to receive services.

Should I sign a document with the provider?

No. The contract or agreement is between the district and the provider, not the parent and the provider.

Will the district provide transportation to supplemental educational services?

No. The parent is responsible for transportation.

If I recently requested school choice for my child and my child is being transferred to another school, can I also request supplemental educational services?

No. The law allows for choice or supplemental educational services.

Issues for Consideration during Contract Discussions

- Will the provider or the district be responsible if a computer that is used to provide the supplemental services does not work?

- Will the provider or the district be responsible for the safety and liability of the students?

- If the funds generated by Title I are insufficient for a full year of service, how will the length of services be adjusted to meet the cost?

- If the services are to be provided on the site of the school's grounds, will the provider or the district be responsible for the supervision of the children, especially if a parent fails to pick the child up on the end of the day's supplemental services session or the child has not transportation?

- Will the district or the provider pay costs that may be incurred during the tie the provider is using a school building?

- How will the provider be paid (upon receipt of a bill, on a weekly/monthly basis, etc.)?

Supplemental Educational Services Policy for South Carolina

SES Enrollment Period

NCLB not only requires that parents must be notified of the availability of SES services, but also requires school districts to ensure an adequate amount of time for parents to make informed decisions about the choice of an SES provider. To ensure that the intent of the legislation is met, the window of enrollment must be at least six weeks. Districts are encouraged to explore additional ways to maximize parental involvement in SES such as: "open" enrollment, expanded marketing in the community, and closer working relationships with providers, and reliance on school-based personnel to better communicate with parents.

SES Parent Enrollment (Parent Choice) Forms Policy

Under no circumstances shall an SES provider or its employees make any alterations to a district supplemental educational services parent enrollment (parent choice) form. This prohibition includes altering a form to specify a provider's company as the SES provider of choice or as the number one choice on the parent enrollment form.

Each school district should share its district's SES parent enrollment form with providers, district and school personnel, and non-district individuals for the purpose of assisting parents of eligible students to sign up for supplemental educational services. School districts should provide parents with information but should not encourage parents to sign up for a particular provider.

Assistance to Parents in the Selection of an SES Provider

The South Carolina Department of Education (SCDE) encourages district and school personnel to provide teachers and principals with information concerning supplemental educational services and state-approved local providers so that they can act as resources for parents choosing a provider. District and school personnel should, if requested by parents, assist parents in the selection of an SES provider.

Parents, and only parents, must make the choice of which provider will provide services to their child(ren). District and school personnel may not tell parents which provider to choose, but may guide them as they look at all the provider information (provided by the provider, district, or South Carolina Department of Education from the state-approved provider's SES application), to make the best possible choice(s) for their child(ren).

This policy was reviewed by the Committee of Practitioners.

Preferential Treatment

No district or school shall give preferential treatment to any SES provider. The following items are examples of such prohibited preferential treatment:

- A district or school shall not give preferential treatment to a provider due to a long- standing relationship with that provider;
- A district or school shall not give preferential treatment to a district's or school's own program over another provider's program (including any advertisement that promotes the district's or school's program over that of another provider).
- A district or school shall not allow access to school facilities free of fees for one provider, but charge rent or other fees to other providers.

Marketing and Unfair Business Practices by Providers

A provider may market its services directly to members of the community or provide general information about the availability of SES. A district or school may not restrict any state-approved provider from engaging in standard marketing practices. However, unfair business practices by providers will not be tolerated. Examples of unfair business practices include, but are not limited to:

- offering "kickbacks" to district or school personnel (including those school personnel hired by the provider) who encourage parents to select that provider as their provider of choice;
- engaging in false advertising about either its program or other providers' programs;

- making payments or in-kind contributions to schools, exclusive of customary fees for facility utilizations, in exchange for access to facilities, to obtain student lists, to obtain other similar benefits for its SES program, or for any illegal purpose;
- encouraging students or parents of students to switch providers once enrolled in a supplemental educational services program;
- using unfair, deceptive, or excessive marketing ploys or practices; or
- representing the provider as having an endorsement of preference from the district(s) or school(s) the provider proposes to serve.

Provider's Use of Financial Incentives or Other Gifts

A provider shall not offer financial incentives or gifts to a student or a student's parent for enrolling in its SES program or to switch from another provider.

A provider shall not offer financial incentives or gifts to a district, school, or school or district employee for enticing students to sign up with the provider.

A provider may offer reasonable incentives or gifts (not financial) to students enrolled in its program for attendance, completion of a task, or student academic achievement.

Hiring District and School Personnel

School teachers and paraprofessionals, including those teachers and paraprofessionals who work in a school or district identified as being in need of improvement, may be hired by a provider to provide supplemental educational services.

A provider's employees who are also employees in a district or school must, if asked for assistance in selecting a provider, offer unbiased assistance to parent(s) that focuses on the specific academic needs of the student and the preferences of the parent(s).

All state-approved SES providers must conduct criminal background checks of any employee who will be providing supplemental educational services to children.

Removal from the State-Approved Provider List

An approved provider will be removed from the state-approved SES provider list if:

- for two consecutive years, there is evidence that shows it failed to contribute to increased student proficiency relative to state academic content and achievement standards;
- the provider fails to provide supplemental educational services consistent with all applicable federal, state, and local health, safety, and civil rights requirements;
- the school or district are approved to be an SES provider, but is identified during the same school year as being in need of improvement; and
- a state-approved SES provider also will be removed from the state-approved SES provider list immediately if it fails to comply with federal laws, regulations, guidance and/or the South Carolina SES Policy regarding:

  - SES Parent Enrollment Forms
  - Assistance to Parents in the Selection of an SES Provider
  - Marketing and Unfair Business Practices
  - Providers' Use of Financial Incentives or Other Gifts
  - Hiring of School and District Personnel
  - Criminal Background Checks

Complaint Procedures

1. The Office of Federal and State Accountability of the South Carolina Department of Education (SCDE) shall review complaints from parent(s)/legal guardian(s), students, supplemental educational services (SES) providers, school districts, schools, and other individuals and organizations to determine whether school districts and SES providers are in compliance with the all applicable local, state and federal laws, regulations and guidance, and South Carolina SES Policy governing the provision of SES, and with all applicable federal, state, and local health, safety, and civil rights requirements.

2. An organization or individual may file with the SCDE's Office of Federal and State Accountability a signed, written complaint setting forth allegations of non-compliance.

3. The written complaint shall include, at a minimum:

   a. A clear statement of the allegation(s);

   b. The facts upon which the allegation(s) is based;

   c. Any documentation supporting the allegation(s); and

   d. The complainant's contact information, including the individual name of the complainant or the authorized representative of the organization, and the address and telephone number of the complainant or the authorized representative of the organization.

4. Complaints shall be signed and addressed in writing to:

   Director, Office of Federal and State Accountability

   Division of Accountability

   South Carolina Department of Education

   1429 Senate Street

   Columbia, South Carolina 29201

5. The Director of the Office of Federal and State Accountability shall acknowledge the complaint within five business days.

6. Within five business days of receiving the complaint, the Director of the Office of Federal and State Accountability shall inform the SES provider or school district against whom the complaint is made in writing, of the filing of the complaint. This notification shall include a listing of the allegations made against the SES provider or school district.

7. A provider or school district against whom a complaint has been filed will have the opportunity to respond by providing appropriate documentation to support compliance with the relevant federal, state, and local requirements. The provider's or school district's response in writing must be received at the Office of Federal and State Accountability within fifteen business days of the provider's or school district's receipt of notification that the Office of Federal and State Accountability has received a complaint. The Office of Federal and State Accountability will use the submitted documentation to attempt to resolve the issue between the parties.

8. If the Office of Federal and State Accountability determines that the complaint cannot be resolved between the parties with the assistance of Office of Federal and State Accountability, a panel of three disinterested members of the state's Committee of Practitioners ("panel") will review the allegations set forth in the complaint, and the SES provider's or school district's response, and will make an independent determination as to whether the allegations warrant further review or action.

9. If necessary, the panel may conduct an on-site visit to clarify any issues raised by the complaint. The panel may examine relevant records and conduct interviews of relevant persons to determine whether there has been a violation of any applicable local, state or federal law, regulation, guideline, or South Carolina SES Policy, or violation of any applicable federal, state, and local health, safety, and civil rights requirements.

10. The panel, through the Office of Federal and State Accountability, shall notify all appropriate parties regarding the steps necessary to resolve the complaint, including technical assistance activities, negotiations, and corrective actions to achieve compliance.

    a. This letter of notification may include specific requirements and timelines that must be met in order to ensure that providers other than school districts continue to receive SES funds from the school district.

    b. School districts that are providers shall meet the requirements in order to ensure that funds equal to the amount of their SES set-aside are available.

11. The panel will conclude its review of the allegations within twenty business days of receiving the provider's or school district's response, or within twenty business days of receiving the complaint, if the provider does not respond to the allegations in the specified time period. During its review, the panel will consider any corrective actions undertaken by the SES provider to address the allegations raised in the complaint.

12. Upon conclusion of the panel's review of the allegations, the panel will decide whether to remove the provider from the state-approved SES providers' list.

    a. If the panel decides to remove a provider from the state-approved SES providers' list, the provider shall be sent a letter by certified mail return receipt requested informing it of its removal no later than three business days after the panel's decision.

    b. If the panel decides to remove a provider from the state-approved SES providers' list, the LEA will be notified, by certified mail return receipt requested, no later than three business days after the panel's decision.

13. Upon notification to the provider of its removal from the state-approved SES providers' list, the provider is not eligible to re-apply to serve students as an approved provider in South Carolina for two years. After the two-year period expires, the provider may re-apply to become a state-approved provider.

    a. Upon approval of the application, the provider may serve students as an approved provider in South Carolina.

    b. In the event that the provider is reinstated, and subsequently is removed from the state-approved providers' list a second time, the provider will be barred permanently from providing SES in South Carolina.

14. If the decision of the panel is to remove a school district who is a state-approved SES provider, the SCDE shall withhold funds equal to the amount of the school district's SES set-aside funds until the school district complies. If funds are withheld from a school district for not providing services to eligible children within the specified timeframe, the SCDE may enter into agreements with state-approved SES providers in lieu of the school district.

15. The panel has the authority to recommend to Office of Federal and State Accountability the appropriate action if it finds a school district is not in compliance with laws, regulations, guidance, or South Carolina SES Policy, or other requirements relating to the provision of SES.

16. Any decision of the panel regarding the removal of state-approved provider from the state-approved SES provider list will be final. There is no right to appeal.

Use of Title I Funds for Rewarding and Retaining Teachers and Principals

Use of Title I Funds for Student Incentives

Attract and Retain Effective Teachers

Section 1113 (c)(4) of NCLB, Eligible School Attendance Areas, allows a district to reserve such funds that are necessary from Title II, and up to 5 percent of its Title I funds to provide financial incentives and rewards to teachers in Title I schools that are identified for school improvement (newly identified, continuing school improvement, corrective action, and restructuring) for the purpose of attracting and retaining qualified and effective teachers. In addition, these reserved funds may be used for financial incentives to attract and retain qualified teachers in hard-to-staff subject areas in these same schools. The LEA may not, however, use Title I, Part A funds for financial incentives to recruit qualified teachers in hard-to-staff subject areas to the LEA as a whole because those teachers would benefit all students in the LEA and would not be necessary to operate the Title I program.

Districts should follow guidance received from the state Title II staff and Non Regulatory Guidance for Title II, Part A to plan financial teacher incentives and rewards available through Title II, Part A Improving Teacher Quality State Grants. It may be possible to use Title II funds in Title I schools not identified for improvement, corrective action or restructuring.

The list below includes a summary of the key guidance for districts that choose to offer financial incentives to attract and retain effective teachers with Title I, Part A funds.

- Financial incentives and rewards may be provided to teachers in Title I schools identified as Newly Identified, Continuing School Improvement, Corrective Action, Plan to Restructure, and/or Restructure.
- The purpose of these financial incentives and rewards must be to attract and retain qualified and effective teachers in those schools.
- A district may not reserve more than 5 percent of its Title I, Part A allocation for these financial incentives and rewards.
- A district may use Title II, Part A funds for financial incentives and rewards for teachers in Title I schools, including those not in the improvement categories as listed in the first bullet with appropriate approval of the Title II staff.

Example

A district along the I-95 corridor has difficulty recruiting and retaining teachers in all of its schools. Of the district's seven schools, three are identified for various stages of improvement, corrective action or restructuring. The district has decided to recruit in-state on college/university campuses and attend teacher recruitment fairs out-of-state in order to fill anticipated vacancies. The district is unable to compete with salaries offered to teachers in Coastal counties and wealthier counties in the Midlands and Upstate.

The district has decided to offer an additional $2,000 (Title II funds) above the state's investment to teachers that earn National Board Certification. The district will offer a $2,000 signing bonus for teachers in hard to fill subject areas: special education, secondary math and secondary science with Title II funds. Finally, the district is offering $1,500 (Title I funds) to teachers that are in good standing with the district to retain teachers at any of the three schools identified for improvement, corrective action or restructuring.

Attract and Retain Effective Principals

In general, an LEA would be expected to have in place a system to recruit principals, given that each school generally must have a principal. However, Title I, Part A funds may be used to enhance existing recruitment efforts in order to recruit principals with the specific skills necessary to turn around low-achieving Title I schools. In addition, Title I, Part A funds may be used to provide financial incentives and awards to retain qualified and effective principals in Title I schools. These incentives and awards need not be included in determining the amount of

funds an LEA may reserve to provide financial incentives and rewards for teachers who work in Title I schools that are identified for improvement, corrective action, or restructuring under section 1113(c)(4) of the ESEA. Note that an LEA may not use Title I, Part A funds to recruit principals to non-Title I schools within the LEA.

The list below includes a summary of the key guidance for districts that choose to offer financial incentives to attract and retain effective principals with Title I, Part A funds.

- The financial incentives and awards must be used to enhance existing recruitment efforts to recruit principals with the specific skills necessary to turn around the district's lowest achieving Title I schools.
- A district may provide financial incentives and awards to retain qualified and effective principals in Title I schools.
- These financial incentives and awards do not need to be included in the 5 percent limitation of funds that a district may reserve for teacher financial incentives and awards.
- A district may not use Title I, Part A funds to recruit principals in non-Title I schools.

United States Department of Education Guidance

Specific guidance for using Title I funds for teacher and principal rewards and incentives can be found in *Using Title I, Part A ARRA Funds for Grants to Local Educational Agencies to Strengthen Education, Drive Reform, and Improve Results for Students* issued on September 2, 2009. Even though the questions and responses in this guidance refer to ARRA funds, the responses apply to the use of regular Title I funds as well.

Recommended Guidelines for Student Incentives

The information in this section provides guidance for using Title I, Part A funds for student incentives.

Allowable procedures for awarding student incentives funded through Title I, Part A:

- The district approves clearly established school criteria in the awarding of incentives to students.
- The district approves clearly established school criteria that consider the use of federal funds for incentives that are reasonable and necessary to carry out the Title I program.
- The total cost of student incentives does not exceed one percent of the school's Title I allocation in any given school year.
- The incentives are supplemental in nature.
- The incentives are awarded for academic progress in any of the core subjects (which may also include incentives for attendance and/or behavior) in a school that is making AYP and is not identified for any of the levels of school improvement.
- The incentives are limited to academic progress in ELA and/or math (which may also include incentives for attendance and/or behavior) in a school that is not making AYP and is identified for one of the levels of school improvement.

Procedures that are not allowed for awarding incentives funded through Title I, Part A:

- The use of cash awards as incentives.
- The use of gift cards as incentives.
- Incentives that are purchased with federal funds that advertise a product or brand (i.e. company logo printed on t-shirts, hats, book bags, etc.).

Summary

The list below includes a summary of the key guidance for districts that choose to offer incentives to students for academic progress with Title I, Part A funds.

- A district may reserve up to 1 percent of a Title I school's allocation for student incentives. The incentives must be
    - supplemental;
    - "ordinary, reasonable, and necessary" to carry out the Title I program;
    - for academic performance in ELA and/or Math, behavior, and/or attendance; and
    - not be used as an incentive to participate in a program.

- Schools that are not identified for improvement, corrective action, or restructuring may offer student incentives for academic progress, behavior, and/or attendance in <u>any</u> of the core subjects.
- The list below includes examples of <u>unallowable student incentives purchased with Title I, Part A funds</u>. This list is not inclusive:
    - Cash Awards
    - Gift Cards
    - Items advertising a company product or brand
    - Incentives to participate in a program

- The list below includes examples of allowable student incentives purchased with Title I, Part A funds. This list is not inclusive:

    - Non-monetary rewards of nominal value
    - Books
    - Instructional supplies/materials
    - Plaques
    - Gift certificates for pizza, etc.

Accounting and Reporting Procedures

Title I Non-Regulatory Guidance: C:\Users\JStanley\Desktop\Rules and Regs 2013\Title I Guidance\Fiscal Issues Guidance 2008.doc http://ed.sc.gov/agency/programs-services/77/documents/Fiscal_Guidance.pdf

Accounting and Reporting Procedures
Fiscal Control and Accounting Requirements

Overview of Federal Accounting Requirements

The federal government requires the states to set fiscal control and accounting procedures for its own funds and those of its sub-grant recipients in accordance with state laws and policies.

These fiscal control and accounting procedures must:

1. Permit preparation of required reports for state and federal officials, and

2. Permit funds to be traced to a level of expenditures adequate to establish that the funds have not been used in violation of restrictions and prohibitions of program statutes.

Federal Financial Management Standards

Grant and sub-grant recipients must meet the following financial management standards:

1. Provide accurate, current and complete disclosure of federally assisted activities in accordance with financial reporting requirements of the program. The federal government requires the states to set fiscal control and accounting procedures for its own funds and sub-grant recipients in accordance with state laws and policies;

2. Maintain records to adequately identify the source and application of funds for federally assisted programs: award letters, authorization statutes, obligations, unobligated balances, assets, liabilities, expenditures and revenue (see Records Retention in this section);

3. Maintain effective control and accountability for all grant and sub-grant cash, real and personal property and other assets. Recipients must adequately safeguard property and ensure it is used solely for authorized purposes;

4. Maintain comparisons of actual expenditures to budgeted expenditures for each grant;

5. Follow applicable federal Office of Management and Budget (OMB) cost principles, the Office of Federal and State Accountability regulations, and the terms of the grant agreements;

6. Support accounting records with source documentation, e.g., approved requisitions and purchase orders, cancelled warrants, paid invoices, payrolls, time and attendance records, contracts and award documents, etc., and

7. Establish reasonable procedures to request funds as close as possible to the time they are needed to make payments for grant activities.

Separate Accounting of Each Grant Project Required

Sub-grantees must maintain a separate accounting of revenues and expenditures by project, by fiscal year.

Fiscal Year Period

"**Fiscal Year**" means a year used as an accounting period. The state of South Carolina, including South Carolina school districts, uses a fiscal year that begins July 1 and ends June 30. The federal fiscal year is October 1 through September 30.

Budgets and Modifications

Budgeting for Good Management Control

To ensure good fiscal control, each recipient of federal or state grant funds must establish a "line item" budget for each project. That means each expenditure account (e.g. instructional salaries, instructional supplies, and purchased services) must be allocated an estimate of the amount of the grant to be spent for that purpose. Planned indirect cost recoveries, equipment purchases, or transfers to other districts must also be budgeted. Federal regulations require a recipient to maintain its accounting records in a manner that allows for comparison of actual expenditures to budgeted amounts for each grant. However, recipients of sub-grants are not usually required to submit detailed line-item budgets to the Office of Federal and State Accountability for approval. The program budget submitted to the Office of Federal and State Accountability is a categorical summary of the recipient's line-item budget for each project; however, detailed line-item budgets may be required by the Office of Federal and State Accountability, at their discretion, as a result of audit findings (see Project Budgets at the end of this section).

General Information

Budget Changes that Require an Amendment with Prior Approval from the Office of Federal and State Accountability

Certain types of post-award changes in budgets and projects require the prior written approval of the Office of Federal and State Accountability. They include:

Budget Changes:

1. A revision in the budget that results in a change in the overall funding.
2. Any change or deviation in budgeted item amounts.

Programmatic Changes:

1. A change in the program scope and objectives.
2. Any change in previously approved activities and services.

Changes that Do Not Require the Office of Federal and State Accountability Approval

Although recipients may **not** re-budget between line items without prior approval from the Office of Federal and State Accountability, recipients may expend up to ten percent above the current budget in an individual category (function/category) without requesting an amendment.

Budget Amendment Form Required

The form titled "Project Budget" must be used to request a budget amendment. Use one copy marked as "change" to demonstrate the actual increase(s) and/or decrease(s) by function/object. In addition, a Project Budget marked as "amendment" should be provided to demonstrate the total revised budget after the budget changes (see attached samples of budget amendment and change pages).

Obtaining Written Approval Before Incurring Obligations

The Project Budget, including amendments, must be submitted to the Office of Federal and State Accountability and approved before making obligations or expenditures above the previously approved budget.

Obligations and Expenditures

"Obligations" are orders placed, contracts awarded and goods and services received but not paid for during the project period.

Earliest Date to Obligate Funds

No funds may be obligated or expended before July 1, and before an approvable project has been submitted to the Office of Federal and State Accountability.

Deadline for Obligations

The project period for Office of Federal and State Accountability administered programs is July 1 through September 30. This means that program funds must be spent by September 30.

Time and Effort Records

Basic Time/Effort Requirements

Sub-grantees must maintain records that document the relationship between payroll costs charged to a grant award and the time actually spent by an employee in carrying out the objectives of that program. When an employee works on more than one project, whether that is a combination of federal and non-federal programs or multiple federal programs, the sub-grantee must support the salaries, wages and benefits charged to each program with appropriate time distribution records. The method used by a recipient to track time and effort must result in an equitable, after-the-fact distribution of the actual activity of each employee.

Time Spent on Federal Grant Activities

Office of Management and Budget (OMB) Circular A-87, Cost Principles for State, Local and Indian Tribal Governments, sets forth federal policies on documenting time spent on federal grant activities. Staff that is paid from multiple funding sources must report their hours worked according to the activities actually performed during a given pay period and not according to how their salary is budgeted. Circular A-81 says compensation for personnel services is an allowable cost of federal programs only if our time sheets reflect an “after-the-fact” distribution of the “actual activity” of each employee. For audit purposes, employees charging time to a federal grant are expected to have reasonable creditable evidence to support the charges (i.e., daily calendar, job description, work products, travel schedules, etc.). Paid leave time and hours worked that can’t be reasonably identified to a specific budget code, for example, time spent attending an all staff meeting, will initially be allocated according to how an employee’s salary is currently budgeted. If necessary, those charges will be adjusted between budget codes later in the year to correspond with actual hours worked.

Documenting Time and Effort

The OMB Circular A-87 lists the following requirements for salary and wage documentation:

No documentation beyond normal payroll record keeping procedures is required for employees whose salaries are charged to a single cost activity.

Where employees work solely on a single federal award or a single cost objective, charges for their salaries may be documented by a periodic certification that the employee worked solely on that particular program for the period covered by the certification. The certification must be done at least semi-annually, signed by the employee or supervisory official having firsthand knowledge of work performed by the individual (See the Sample Certification of Full-Time Employment under Title I at the end of this section).

Where employees work on multiple activities or cost objectives, the charges to federal programs must be supported by personnel activity reports (see criteria below and the Sample Calendar at the end of this section). This documentation is required whenever employees work on:

- more than one federal award;
- a federal award and a non-federal award;
- an indirect cost activity and a federal award;
- two or more indirect cost activities that use different allocation methods; or
- an unallowable activity and a federal award or an indirect cost activity.

Personnel activity reports must:

a. Show charges to federal projects were made based on actual time spent working on the activities;

b. Account for total time of each employee;

c. Be prepared at least monthly and coincide with one or more pay periods;

d. Be signed by the employee; and

e. Not be based on budget estimates of the employee's time, but may be estimated in the interim if revised at least quarterly to reflect actual time and effort.

Time and Effort Audits

Time and effort records must be retained for audit purposes.

Cash Advances and Disbursements

Cash Advances

The South Carolina Department of Education has been advised to discontinue the practice of issuing cash disbursements prior to actual expenditures. All cash disbursements will be on a reimbursement basis.

Cash Disbursement (Reimbursements)

Program expenditures will be reported on the "Expenditure Report" (claim) form (see attached). Cash disbursements (reimbursement from the SCDE to the district) will be based on actual program expenditures that were incurred and reported via the Expenditure Report.

Cash disbursements (reimbursements) of federal program funds are dependent on factors such as:

- Submission of an acceptable application;
- Timely submission of expenditure reports (claims) by the recipient (expenditure reports should be submitted at least on a quarterly basis, though they may be submitted more frequently if needed); and
- Supporting documentation, such as invoices, time sheets, trip reports, etc., are not required for reimbursement requests; however, these documents should be kept on file at the LEA for auditing and monitoring purposes.

The Office of Federal and State Accountability reserves the right to request this documentation as needed.

Instructions for Preparation of an Expenditure Report (Claim)

All accountants and bookkeepers responsible for Title I funds should have a **current** copy of the Title I project "Project Budget" for reference. Expenditure reports must show the project number, county number, district number, dates expenditures were incurred, and claim number (in numerical sequence) for the appropriate project. The report should be signed and dated by authorized personnel prior to submission.

Final Expenditure Report

The final expenditure report must be received in the Project Accounting Section, Office of Finance of the South Carolina Department of Education by September 30th.

Records Retention

How Long to Retain Grant Records

Federal regulations require recipients to retain records for a period of three years after the day the fiscal closeout report for a project has been submitted. If any litigation, claim, negotiation, audit or other action involving the records has been started before the expiration of the three-year period, the records must be retained until completion of the action and resolution of all issues which arise from it, or until the end of the regular three-year period, whichever is later.

Grant Files Required

The recipient's business and/or Title I office must keep a grant file for each separate project containing the following documents for audit purposes:

1. Grant application
2. Approved budgets
3. Award document
4. Record of cash requests (copies of cash request forms)
5. Record of cash receipts
6. Cash disbursements
7. Matching expenditures
8. Important correspondence
9. Final reporting and closeout documents

Carryover Funds

Basic Carryover Provisions

"Carryover" funds are grant funds which, if not obligated by the end of the project period, remain available to the sub-grantee for one additional project period.

Grant project periods for most of the grants administered by the Office of Federal and State Accountability begin July 1, and end on September 30. Funds that remain unobligated at the end of the project period are considered for inclusion in the ensuing year's project as carryover. That is, the unobligated funds are in addition to the amount awarded for the following year.

The following grants allow carryover:

- ESEA Title I, Part A, Improving Basic Programs
- ESEA Title I, Part D, Neglected, Delinquent and At-Risk Youth

Expenditures using carryover funds are subject to the same requirements as all other funding under that particular federal program. A recipient must spend the carryover funds in compliance with the same regulations and terms as other program funds in the current year's award.

Carryover Restrictions for Title I

The following percentage limitations are applied at the end of the project period based on information submitted on the final Expenditure Report:

The carryover amount for Title I, Part A, Improving Basic Programs is limited to 15 percent of a district's new year grant funds for districts that receive an allocation of $50,000 or more.

A district may submit a written request for a waiver to one or more of the ESEA carryover limitations by September 30. A request may be granted only once every three years.

Parental Involvement

Title I Non-Regulatory Guidance: http://ed.sc.gov/agency/programs-services/77/documents/Parent_Involvement_Guidance.pdf

Parental Involvement

A district may receive funds under Title I only if the district implements programs, activities, and procedures for the involvement of parents in Title I programs that are consistent with the requirements of section 1118. Districts must plan and implement these programs, activities, and procedures with meaningful consultation with parents of children participating in Title I programs. *[Section 1118(a), NCLB.]*

District-level Parental Involvement Policy

Each district that receives Title I funds must develop a written parental involvement policy that establishes the district's expectations for parental involvement. The policy must be developed jointly with, and agreed upon with, the parents of children participating in Title I programs and distributed to parents of all children participating in Title I programs. If the district already has a district-level parental involvement policy that applies to all parents, the district may amend that existing policy, if necessary, to meet the requirements of section 1118. *[Section 1118(b)(3), NCLB.]*

District-level Notification Requirements

Parents Right-to-Know

At the beginning of each school year, districts must inform parents of each student attending a Title I school of their right to request information about the professional qualifications of both the teachers and the paraprofessionals who teach and work with their children in an understandable and uniform format, including alternative formats upon request, and to the extent practicable, in a language parents can understand.

Parents of Limited English Proficient Children

Districts receiving Title I funds must implement effective means of outreach to parents of limited English proficient students to inform those parents of how the parents can be involved in the education of their children; and can be active participants in assisting their children to attain English proficiency, achieve at high levels in core academic subjects, and meet the challenging state academic achievement and content standards expected of all students.

Districts' outreach to parents of limited English proficient students must include sending notice of opportunities for and holding regular meetings for the purpose of formulating and responding to recommendations from parents of Title I students.

Title I Funded Language Instruction Educational Programs

Districts using Title I funds to provide a language instruction educational program (as defined in Title III, Part C) must provide the following information to parents of limited English proficient children identified for participation or participating in such a program:

- the reasons for the identification of their child as limited English proficient;
- the child's level of English proficiency, how that level was assessed, and the status of the child's academic achievement;
- the methods of instruction used in the program;
- how the program in which their child is or will be participating will meet the educational strengths and needs of their child;
- how the program will specifically help their child learn English, and meet age-appropriate academic achievement standards for grade promotion and graduation;
- the specific exit requirements of the program, including the expected rate of transition from the program into classrooms that are not tailored for limited English proficient children;
- in the case of a child with a disability, how the program meets the objectives of the child's individual education plan (IEP) under The Individuals with Disabilities Education Act (IDEA) or the child's individualized services under Section 504 of the Rehabilitation Act of 1973 (Section 504); and
- information pertaining to parental rights, including written guidance

- detailing the option that parents have a right to decline enrollment in a language instructional program and to choose another program or method of instruction if available,
- detailing the right that parents have to remove their child immediately from the program upon the parents' request, and
- assisting parents in selecting among various programs and methods of instruction, if more than one program or method is offered by the eligible entity.

These notice requirements also apply to a language instruction educational program funded under Part A of Title III. *[Section 3303, NCLB.]*

Districts must provide the above information to parents not later than 30 days after the beginning of the school year for those children identified before the beginning of the school year as limited English proficient. For children identified after the beginning of the school year as limited English proficient, the district must provide the above information to parents within the first 2 weeks of the child being placed in a language instruction educational program.

Children with Disabilities in a Title I-Funded Language Instruction Educational Program

In the case of a child with a disability who is in a language instruction educational program, parents must be notified, not later than 30 days after the beginning of the school year, of how the language instruction educational program meets the objectives of the child's IEP under the IDEA or the child's individualized services under Section 504. *[Section 1112(g)(1)(A)(i), NCLB.]*

ESEA Accountability Status

If a district has a school identified as priority or focus, the district must, promptly following identification, provide a notice to a parent or parents of each student enrolled in the school that

- explains what the identification means, and how the school compares academically to other schools served by the district and the SEA involved;

- identifies the reasons for the identification;
- provides an explanation of how the parents can become involved in addressing the academic issues that caused the school to be identified for school improvement; and
- explains the parent's option to transfer his or her child to another public school, with transportation provided by the district, or to obtain supplemental educational services for the child. *[Section 1116(b)(6), NCLB.]*

The notification must provide parents with enough relevant information to help them decide what is best for their child. The district

- must inform parents about the academic achievement of students at the school or schools to which their child may transfer;
- may choose to include a description of the special academic programs, and facilities, and before- or after-school programs available at those schools;
- may include the professional qualifications of teachers in the core academic subjects,
- may include the professional qualifications of teachers in the core academic subjects, and
- may identify parental involvement opportunities. *[Section 200.37(b), Title I Regulations.]*

[Because a district must provide choice to students in eligible schools not later than the first day of the school year, notice to parents should occur well before that date.]

In addition to providing school improvement information to the parents of each student in the school, a district must publish and disseminate, to both parents and the public, information explaining

- what the school is doing to address the problem of low achievement;
- what the district or the SEA is doing to help the school address the problem; and
- if applicable, a description of specific corrective actions or restructuring plans. *[Section 1116(b)(6), NCLB, and Section 200.38, Title I Regulations.]*

Technical Assistance to Schools Identified for as Priority or Focus

A district is responsible for ensuring that technical assistance is provided during the entire period to each priority or focus school identified, as the school develops and implements its improvement, and that the technical assistance is based on scientifically based research (SBR). The district must provide specific technical assistance that includes help with analyzing data from the assessments, and other examples of student work, to identify and address problems in instruction, and problems, if any, in implementing the parental involvement requirements and professional development requirements. *[Section 1116(b)(4), NCLB.]*

Supplemental Educational Services

If a Title I school is identified as priority or focus, the district serving that school must arrange to provide supplemental educational services to eligible children in the school. A district must:

- provide, at a minimum, annual notice to parents of: (1) the availability of the supplemental educational services; (2) the identity of the approved providers that are within the LEA or whose services are reasonably available in neighboring LEAs; and (3) a brief description of the services;
- qualifications, demonstrated effectiveness of each provider, demonstrated effectiveness of each provider, (and if requested, assist parents in choosing a provider from the list);
- apply fair and equitable procedures for selecting students to be served if the number of spaces at approved providers is not sufficient; and
- not disclose to the public the identity of any student who is eligible for, or receiving, supplemental educational services without the written permission of the parents of the student. *[Section 1116(e)(2), NCLB.]*

Restructuring

If a district identifies a school for restructuring, which means a major reorganization of the school's governance arrangement, the district must provide both parents and teachers with prompt notice;

- an opportunity to comment before any action under the restructuring plan takes place; and
- an opportunity to participate in the development of any restructuring plans. *[Section 1116(b)(8)(C), NCLB; Section 200.43, Title I Regulations.]*

School-level Parental Involvement Policy

Each school must develop, jointly with parents of children participating in Title I services, a written school-parental involvement policy that describes how the school will carry out the parental involvement requirements, including the development of a school-parent compact. If the school already has a parental involvement policy that applies to all parents, the school may amend that existing policy, if necessary, to meet the requirements of section 1118(b). Schools must update these policies annually to meet the changing needs of parents and the school. *[Section 1118(b), NCLB.]*

The district-level parental involvement policy may be amended to meet all the school-level parental involvement policy requirements and be used by the school.

School-level Notification Requirements

Parents Right-to-Know

Title I schools must give each parent timely notice when their child has been assigned, or has been taught for four or more consecutive weeks, by a teacher who is not highly qualified. *[Section 1111(h)(6)(B)(ii), NCLB.]*

Information and Opportunities

Schools served under Title I must provide to parents of participating children, in a timely manner, information about the programs funded by Title I. That information must include:

- a description and explanation of the school's curriculum;
- information on the forms of academic assessment used to measure student progress; and
- information on the proficiency levels students are expected to meet.

Upon the request of parents, schools must provide opportunities for regular meetings for parents to formulate suggestions and to participate, as appropriate, in decisions about the education of their children. The school must respond to any such suggestions as soon as practicably possible. *[Section 1118(c)(4), NCLB.]*

School-Parent Compact

Each Title I school must jointly develop, with the parents of children served under Title I, a school-parent compact as a component of its written parental involvement policy. A school-parent compact is a written agreement between the school and the parents of children participating in Title I programs that identifies the activities that the parents, the entire school staff, and the students will undertake to share the responsibility for improved student academic achievement. *[Section 1118(d)], NCLB.]*

The school-parent compact must describe:

- The school's responsibility to provide high-quality curriculum and instruction in a supportive and effective learning environment that enables children served under Title I to meet the state's student academic achievement standards;

- Ways in which parents will be responsible for supporting their children's learning (for example, monitoring attendance, homework completion, or television watching; volunteering in their child's classroom; and participating as appropriate in decisions relating to the education of their children and positive use of extracurricular time); and

- The importance of communication between teachers and parents on an ongoing basis through, at a minimum:

    - parent-teacher conferences, at least annually, during which the compact will be discussed as it relates to the individual child's achievement;

    - frequent reports to parents on their child's progress; and

    - reasonable access to staff, opportunities to volunteer and participate in their child's class, and observation of classroom activities. *[Section 1118(d), NCLB.]*

District and School Joint Responsibilities to Build Parent Capacity

Each school and district receiving assistance under Title I must ensure effective involvement of parents and support a partnership among the school, the parents, and the community to improve student academic achievement through training, information, and coordination activities. *[Section 1118(e), NCLB.]*

Joint responsibilities include:

- assistance and training for parents;
- parent literacy and education;
- assisting parents to work with their children;
- parents volunteering in classrooms;
- training school staff to work with parents;
- maximizing parental participation; and
- community involvement.

Set-Aside for Parental Involvement

Each district that receives a Title I allocation of greater than $500,000 must set aside at least 1 percent of that allocation to carry out required parental involvement activities, including promoting family literacy and parenting skills. (Parents of children receiving Title I services must be involved in the decisions regarding how the set-aside funds are allotted for parental involvement activities.) The district must then set-aside an amount for parental involvement for parents of private school children based on the proportion of private school children from low-income families residing in Title I attendance areas. (This does not apply to districts that do not provide Title I services to children attending private schools, see example 1 below.) The district then must distribute at least 95 percent of the remainder to its Title I public schools for school-level parental involvement activities.

If a district decides to set aside an amount greater than 1 percent of its total Title I allocation, the district is still only required to distribute 95 percent of 1 percent of its total Title I allocation to its schools. However, the requirement to allocate an equitable amount for the involvement of private school parents applies to the entire amount set aside.

Districts receiving a Title I allocation of $500,000 or less must carry out the required parental involvement activities, but are not required to set aside any specific amount from their Title I allocation or distribute any set amount to their schools.

Example 1:

EXAMPLE OF EQUITABLE SERVICES CALCULATION RELATED TO PARENTAL INVOLVEMENT FOR FAMILIES OF PRIVATE SCHOOL CHILDREN

A district reserves 1½ percent ($90,000) of its Title I allocation of $6,000,000 for parental involvement activities. (Note that this is more than the required minimum of 1 percent.) The number of public and private school children from low-income families residing in participating Title I attendance areas is 25,000. Five percent of the 25,000 children attend private schools; thus 5 percent of the $90,000 reservation, or $4,500, is available for parental involvement activities for parents of private school participants. The parental involvement program funded by Title I must meet the needs of the parents of private school participants. After consultation with the appropriate private school officials, the district may conduct these activities independently or in conjunction with the district's regular parental involvement activities.

Example 2:

CALCULATION OF LEA'S DISTRIBUTION OF FUNDS TO SCHOOLS FOR PARENTAL INVOLVEMENT ACTIVITIES:	
District's total Title I allocation (Less Carryover)	$ 6,000,000
Parental involvement reservation (1%) (.01 x $6,000,000)	$60,000
To determine Private School Set-Aside: .05 (percentage of private school Title I served students) x $60,000 (amount LEA reserved for parental involvement)	$ 3,000
Amount remaining ($60,000 - $3,000)	$ 57,000
<u>Public school</u> distribution 95% (required minimum distribution percentage) x $57,000	$ 54,150
Balance available for LEA-level parental involvement activities ($57,000 - $54,150)	$ 2,850

Compliance Checklist of Parental Involvement in Title I

There are numerous parental involvement requirements in the Title I law. This compliance checklist will help remind district and school personnel of these requirements and ensure they are completed on an annual basis.

- ☐ **Parent Involvement Policies** – Each district and school that receives Title I Part A funds or services must develop jointly with, agree on with, and distribute to parents of participating children, written parental involvement polices that contain information required by the Elementary and Secondary Education Act. [Section 1118(a)(2); 1118(b)(1); 1118(c)(3)] Guidance C-2 , C-3, C-4 and D-1

- ☐ **Parent-School Compacts** – A written commitment must be developed each year indicating how all members of the school community, including parents, teachers, principals, students, and concerned community members, agree to share responsibility for student learning.[Section 1118(d)] Guidance, D-8 and D-9

- ☐ **Annual Parent Meeting** – Each year, the Title I program is required to host a meeting for parents to explain what the Title I program is and how Title I students will be assessed. It should also include information on how parents can be involved in their children's education. [Section 1118 (c) (1) and (2)] Guidance, D-5 andD-6

- ☐ **Assessing the Parent Involvement Component** – At the end of each school year, the Title I program must somehow assess their parent involvement component. Parents are asked to either participate in a formal meeting or complete a survey, giving their input. [Section 1118(a)(2)(E); 1118(c)(1)] Guidance, D-4 and D-5

- ☐ **Training Parents** – The Title I program provides parents with opportunities to become partners with the school in promoting the education of their children at school and at home. [Section 1118 (c) (4) (A) and (C), (e) (2) and (6-10)] Guidance, E-2 and E-4

- ☐ **Annual Review Meeting** – Each year, Title I requires a review to be conducted of the entire Title I program. Parents are to be informed of any results of this meeting. [Section 1118 (c) (3)] Guidance, D-4

- ☐ **Assessment Information:** Share frequent reports of student progress with parents as well as interpretation of the results. Seek parental input into decisions involving ways to increase academic achievement. [Section 1111(h)(6) (B)(i)] Guidance, D-10

- ☐ **Parents' Right to Know Clause** – Parents have the right to know the qualifications of their children's teacher. At the beginning of each school year, the LEA must notify parents of such information. Parents should be informed if child is taught for four or more weeks by a teacher who is not "highly qualified". [Section 1111(h)(6) and (C)] Guidance, C-6 and D-3

- ☐ **School/District Report Cards** – Parents must be notified annually regarding the availability of the school and district report cards outlining the academic achievement of all public districts and schools in the state. [Section 11119h)(2) and (E)] Guidance C-7

- ☐ **Adequate Yearly Progress Reports** – Parents must be provided with a copy of the school and district adequate yearly progress reports each year, along with correspondence explaining the reports. [Section 1116 (a)(1)(C)(D)] Guidance, C-20

- ☐ **Notification of Improvement Status-** Provide information to parents about schools identified for School Improvement, Corrective Action, or Restructuring [Section 1116 (b)(6) (A-F), (7)(E)] Guidance C-21

- ☐ **LEP Parent Notification** – Parents must be notified if their children are placed in a program for LEP students. Section 1112(g)(1) (2) and (3)] Guidance, C-9

- ☐ **Reservation of Funds** – If a district's Title I allocation is $500,000 or more, they are then required to set aside 1% of their district's Title I allocation for parental involvement. Only 5% of these funds may be used at the district level; 95% must be given to the participating schools.

  [Section 1118(a)(3)(B),] Guidance C-13, C-14, C-15 and C-16

District Parent Policy Checklist

District: _____

Federal law [20 U.S.C. §6318(a)(2)] requires that each LEA that receives Title I funds develop jointly with, agree on with, and distribute to, parents of participating children, a written parent involvement policy.

This policy must describe how the LEA will:

Please mark "X" for Completed

- ☐ Involve parents in the joint development of the LEA plan annually updated in the online Title I Application.
- ☐ Involve parents in the process of school review and improvement
- ☐ Provide the coordination, technical assistance, and other support necessary to assist participating schools in planning and implementing effective parent involvement activities to improve student academic achievement and school performance
- ☐ Build the schools' and parents' capacity for strong parental involvement
- ☐ Coordinate and integrate parental involvement strategies under this part with parental involvement strategies under other programs, such as the Head Start program, Parents as Teachers program, Home Instruction Program for Preschool Youngsters, and locally-run preschool program(s)
- ☐ Conduct, with the involvement of parents, an annual evaluation of the content and effectiveness of the parental involvement policy in improving the academic quality of the schools served
- ☐ Involve parents in the activities of the schools served under this part

Sample District Wide Parental Involvement Policy

SAMPLE TEMPLATE*

NOTE: In support of strengthening student academic achievement, each local educational agency (LEA or school district) that receives Title I, Part A funds must develop jointly with, agree on with, and distribute to, parents of participating children a written parental involvement policy that contains information required by section 1118(a)(2) of the Elementary and Secondary Education Act (ESEA) (district wide parental involvement policy). The policy establishes the LEA's expectations for parental involvement and describes how the LEA will implement a number of specific parental involvement activities, and is incorporated into the LEA's plan submitted to the State educational agency (SEA).

School districts, in consultation with parents, may use the sample template below as a framework for the information to be included in their parental involvement policy. School districts are not required to follow this sample template or framework, but if they establish the district's expectations for parental involvement and include all of the components listed under "Description of How District Will Implement Required District wide Parental Involvement Policy Components" below, they will have incorporated the information that section 1118(a)(2) requires be in the district wide parental involvement policy. School districts, in consultation with parents, are encouraged to include other relevant and agreed upon activities and actions as well that will support effective parental involvement and strengthen student academic achievement.

* * * * *

PART I. GENERAL EXPECTATIONS (Sample Template)

[NOTE: Each district in its District-wide Parental Involvement Policy must establish the district's expectations for parental involvement. *[Section 1118(a)(2), ESEA.]* There is no required format for those written expectations; however, this is a sample of what might be included.]

The name of school district agrees to implement the following statutory requirements:

- The school district will put into operation programs, activities and procedures for the involvement of parents in all of its schools with Title I, Part A programs, consistent with section 1118 of the Elementary and Secondary Education Act (ESEA). Those programs, activities and procedures will be planned and operated with meaningful consultation with parents of participating children.

- Consistent with section 1118, the school district will work with its schools to ensure that the required school-level parental involvement policies meet the requirements of section 1118(b) of the ESEA, and each include, as a component, a school-parent compact consistent with section 1118(d) of the ESEA.

- The school district will incorporate this district wide parental involvement policy into its LEA plan developed under section 1112 of the ESEA.

- In carrying out the Title I, Part A parental involvement requirements, to the extent practicable, the school district and its schools will provide full opportunities for the participation of parents with limited English proficiency, parents with disabilities, and parents of migratory children, including providing information and school reports required under section 1111 of the ESEA in an understandable and uniform format and, including alternative formats upon request, and, to the extent practicable, in a language parents understand.

- If the LEA plan for Title I, Part A, developed under section 1112 of the ESEA, is not satisfactory to the parents of participating children, the school district will submit any parent comments with the plan when the school district submits the plan to the State Department of Education.

 The school district will involve the parents of children served in Title I, Part A schools in decisions about how the 1 percent of Title I, Part A funds reserved for parental involvement is spent, and will ensure that not less than 95 percent of the one percent reserved goes directly to the schools.

 The school district will be governed by the following statutory definition of parental involvement, and expects that its Title I schools will carry out programs, activities and procedures in accordance with this definition:

Parental involvement means the participation of parents in regular, two-way, and meaningful communication involving student academic learning and other school activities, including ensuring—
(A) that parents play an integral role in assisting their child's learning;
(B) that parents are encouraged to be actively involved in their child's education at school; (C) that parents are full partners in their child's education and are included, as appropriate, in decision-making and on advisory committees to assist in the education of their child;
(D) the carrying out of other activities, such as those described in section 1118 of the ESEA.

 [For States where a Parental Information and Resource Center is established] The school district will inform parents and parental organizations of the purpose and existence of the Parental Information and Resource Center in the State.

PART II. DESCRIPTION OF HOW DISTRICT WILL IMPLEMENT REQUIRED DISTRICT WIDE PARENTAL INVOLVEMENT POLICY COMPONENTS (Sample Template)
[NOTE: The District wide Parental Involvement Policy must include a description of how the district will implement or accomplish each of the following components. *[Section 1118(a)(2), ESEA.]* This is a "sample template" as there is no required format for these descriptions. However, regardless of the format the district chooses to use, a description of each of the following components below must be included in order to satisfy statutory requirements.]

1. The **__name of school district_____** will take the following actions to involve parents in the joint development of its district wide parental involvement plan under section 1112 of the ESEA:
(List actions.)

2. The **__name of school district_____** will take the following actions to involve parents in the process of school review and improvement under section 1116 of the ESEA:
(List actions.)

3. The **name of school district** will provide the following necessary coordination, technical assistance, and other support to assist Title I, Part A schools in planning and implementing effective parental involvement activities to improve student academic achievement and school performance:
(List activities.)

4. The **name of school district** will coordinate and integrate parental involvement strategies in Part A with parental involvement strategies under the following other programs: [Insert programs, such as: Head Start, Reading First, Early Reading First, Even Start, Parents As Teachers, Home Instruction Program for Preschool Youngsters, and State-operated preschool programs], by:
(List activities.)

5. The **_name of school district_** will take the following actions to conduct, with the involvement of parents, an annual evaluation of the content and effectiveness of this parental involvement policy in improving the quality of its Title I, Part A schools. The evaluation will include identifying barriers to greater participation by parents in parental involvement activities (with particular attention to parents who are economically disadvantaged, are disabled, have limited English proficiency, have limited literacy, or are of any racial or ethnic minority background). The school

district will use the findings of the evaluation about its parental involvement policy and activities to design strategies for more effective parental involvement, and to revise, if necessary (and with the involvement of parents) its parental involvement policies.
(List actions, such as describing how the evaluation will be conducted, identifying who will be responsible for conducting it, and explaining what role parents will play)

1. The **___name of school district_____** will build the schools' and parent's capacity for strong parental involvement, in order to ensure effective involvement of parents and to support a partnership among the school involved, parents, and the community to improve student academic achievement, through the following activities specifically described below:

A. The school district will, with the assistance of its Title I, Part A schools, provide assistance to parents of children served by the school district or school, as appropriate, in understanding topics such as the following, by undertaking the actions described in this paragraph --

- the State's academic content standards,
- the State's student academic achievement standards,
- the State and local academic assessments including alternate assessments,
- the requirements of Part A,
- how to monitor their child's progress, and
- how to work with educators:

(List activities, such as workshops, conferences, classes, both in-State and out-of-State, including any equipment or other materials that may be necessary to ensure success.)

B. The school district will, with the assistance of its schools, provide materials and training to help parents work with their children to improve their children's academic achievement, such as literacy training, and using technology, as appropriate, to foster parental involvement, by:
(List activities.)

C. The school district will, with the assistance of its schools and parents, educate its teachers, pupil services personnel, principals and other staff, in how to reach out to, communicate with, and work with parents as equal partners, in the value and utility of contributions of parents, and in how to implement and coordinate parent programs and build ties between parents and schools, by:
(List activities.)

D. The school district will, to the extent feasible and appropriate, coordinate and integrate parental involvement programs and activities with Head Start, Reading First, Early Reading First, Even Start, Home Instruction Programs for Preschool Youngsters, the Parents as Teachers Program, and public preschool and other programs, and conduct other activities, such as parent resource centers, that encourage and support parents in more fully participating in the education of their children, by:
(List activities.)

E. The school district will take the following actions to ensure that information related to the school and parent-programs, meetings, and other activities, is sent to the parents of participating children in an understandable and uniform format, including alternative formats upon request, and, to the extent practicable, in a language the parents can understand:
(List actions.)

PART III. DISCRETIONARY DISTRICT WIDE PARENTAL INVOLVEMENT POLICY COMPONENTS (Sample Template)

NOTE: The District wide Parental Involvement Policy may include additional paragraphs listing and describing other discretionary activities that the school district, in consultation with its parents, chooses to undertake to build parents' capacity for involvement in the school and school system to support their children's academic achievement, such as the following discretionary activities listed under section 1118(e) of the ESEA:

- involving parents in the development of training for teachers, principals, and other educators to improve the effectiveness of that training;

- providing necessary literacy training for parents from Title I, Part A funds, if the school district has exhausted all other reasonably available sources of funding for that training;

- paying reasonable and necessary expenses associated with parental involvement activities, including transportation and child care costs, to enable parents to participate in school-related meetings and training sessions;

- training parents to enhance the involvement of other parents;

- in order to maximize parental involvement and participation in their children's education, arranging school meetings at a variety of times, or conducting in-home conferences between teachers or other educators, who work directly with participating children, with parents who are unable to attend those conferences at school;

- adopting and implementing model approaches to improving parental involvement;

- establishing a district wide parent advisory council to provide advice on all matters related to parental involvement in Title I, Part A programs;

- developing appropriate roles for community-based organizations and businesses, including faith-based organizations, in parental involvement activities; and

- providing other reasonable support for parental involvement activities under section 1118 as parents may request.]

* * * * *

PART IV. ADOPTION (Sample Template)

This District wide Parental Involvement Policy has been developed jointly with, and agreed on with, parents of children participating in Title I, Part A programs, as evidenced by _____.
This policy was adopted by the **__name of school district __** on **__mm/dd/yy_____** and will be in effect for the period of _____. The school district will distribute this policy to all parents of participating Title I, Part A children on or before _____.

_____ _____
(Signature of Authorized Official) *(Date)*

Title I School Parent Involvement Policy Self-Checklist

LEA Name: _____ School Name: _____

Title I Parent Involvement requires each Title I school to develop a written parental involvement policy that describes the means for carrying out the requirements of Section 1118. The School must ensure that information related to school and parent programs, meetings and other activities are sent to the parents of Title I children in a format and in a language the parents can understand.

The policy must be:

- Developed jointly with and agreed on by parents of Title I children;
- Written in an understandable format and provided in a language parents can understand;
- Distributed to all parents of Title I children; and
- Made available to the local community and updated periodically to meet the changing needs of parents and the school.

CHECKLIST OF REQUIRED COMPONENTS	YES	NO
1) The Policy describes how parents will be involved in the planning, review and improvement of the school's Parent Involvement Policy.		
2) The Policy states that an annual meeting will be held to inform parents of the school's participation in the Title I program and to explain the requirements of the program and their right to be involved.		
3.) The Policy states that parent meetings, including parent conferences, will be held at different times during the day.		
4) The Policy states that Title I funds may be used to pay reasonable and necessary expenses associated with parent involvement activities, including transportation, childcare, or home visit expenses to enable parents to participate in school-related meetings and training sessions.		
5) The Policy describes how parents will be involved in the planning, review, and improvement of the school's Title I program.		
6) The Policy describes how the school involves parents in the joint development of the Schoolwide Program Plan under Section 1114. *Applies only to Title I schools operating a Schoolwide Program.*		
7) The Policy describes how the school involves parents in the joint development of the School Improvement Plan under Section 1116. *Applies only to Title I schools identified for School Improvement.*		
8) The Policy describes how the school will provide parents of participating children with timely information about the Title I program.		
9) The Policy describes how the school will provide parents of participating children with a description and explanation of the curriculum in use at the school, the forms of academic assessment used to measure student progress, and the proficiency levels students are expected to meet.		
10) The Policy describes how the school will provide assistance to parents in understanding the State's academic content standards and student achievement standards, local academic assessments and how to monitor a child's progress and work with teachers to improve the achievement of their children.		
11) The Policy states that the school will provide, if requested by parents, opportunities for regular meetings to formulate suggestions and to participate, as appropriate, in decisions relating to the education of their children, and respond to any such suggestions as soon as practicably possible.		
12) The Policy states that a school-parent compact was jointly developed with parents and the compact outlines how parents, the entire school staff and students will share in the responsibility for improved student achievement.		
13) The Policy describes how the school provides materials and training to help parents to work with their children to improve their children's achievement, such as literacy training and using technology, as appropriate, to foster parent involvement.		

School-Parent Compact Requirements Checklist

Federal law [20 U.S.C. §6318(d)] requires that each school served under Title I shall jointly develop with parents a school-parent compact that outlines how parents, the entire school staff, and students will share the responsibility for improved student academic achievement and the means by which the school and parents will build and develop a partnership to help children achieve the State's high academic standards.

This school-parent compact must:

Please mark "X" for Completed

- ☐ Describe the school's responsibility to provide high-quality curriculum and instruction in a supportive and effective learning environment
- ☐ Describe the ways in which each parent will be responsible for supporting their children's learning, such as monitoring attendance, homework completion, and television watching, as well as volunteering in their child's classroom
- ☐ Address the importance of communication between teachers and parents on an ongoing basis through, at a minimum:
- ☐ Annual parent-teacher conferences in elementary schools
- ☐ Frequent reports to parents on their children's progress
- ☐ Reasonable access to staff
- ☐ Opportunities to volunteer and participate in their child's class
- ☐ Observation of classroom activities

Sample School-Parent Compact

XYZ Elementary School

(school logo if available)

School- Parent Compact

The XYZ Elementary School learning community of teachers, support staff, administrators, and families, have written this compact to outline how the entire school staff and students will share the responsibility for improved student academic achievement and the means by which the school and parents will build and develop a partnership to help children achieve the State's high standards.

Our School Responsibilities

XYZ Elementary School administrators, teachers and support staff will:

1. Provide high-quality curriculum and instruction in a supportive and effective learning environment that enables children to meet the State's student academic achievement standards as follows:

- Provide targeted academic and behavioral supports to students ensuring all subgroups of students meet their learning targets
- Ensure a safe environment conducive to learning
- Progress monitoring with formative assessments are used for all students to ensure all students make at least a year's growth in Reading and Math
- Curriculum is aligned to State Academic Content Standards
- Enrichment activities are provided to enhance and support higher – level learning

2. Hold parent-teacher conferences in the first nine weeks each year during which this compact will be discussed as it relates to the individual child's achievement. Specifically, those conferences will be held:

- Scheduled conferences are held ___(date)_____. Parents and teachers may also schedule conferences as needed throughout the school year.

3. Provide parents with frequent reports on their children's progress. Specifically, the school will provide reports as follows:

- Interim Reports are sent home for parents to review four times a year, mid-quarter. Parents are invited to ask questions about their child's report.
- Report cards are sent home quarterly. Parents are invited to contact their child's teacher with questions.

4. Provide parents reasonable access to staff. Specifically, staff will be available for consultation with parents as follows:

- Phone and voicemail
- E-mail
- Written notes in child's agenda (daily assignment log)
- One scheduled conference a year and additional conferences as requested by the parent or teacher.

5. Provide parents opportunities to support their child's education and the education of all XYZ Elementary School students by participating in XYZ Elementary School as follows:

- Join children for lunch
- Chaperone field trips
- Observe classrooms
- Serving on the PTO
- Volunteering as a tutor, mentor or activity leader
- Assist in an area of the school such as our children's classroom, library and playground
- Attend school events such as Open House, performances, field day, etc.
- Help to review Title I plans and compacts
- Participate on XYZ County School District committees

Principal's Signature: _____ **Date**_____

Teacher's Signature: _____ **Date**_____

Family Responsibilities

XYZ Elementary School families will support our children's learning in the following ways:

- Ensuring our children attend school and come to school on time
- Reading and signing student agendas daily
- Helping our children complete their homework to the best of their ability by:
    - Encouraging our children to do their best work
    - Helping our children understand directions for assignments
    - Talking with our children about learning and school in a positive way
    - Notifying the teacher when our child has difficulty completing homework assignments
- Keeping in contact with our child's teacher
- Attending our children's parent-teacher conferences and other meetings pertaining to our children
- Monitoring amount of television and the types of television programs our children watch
- Participating, as appropriate, in decisions relating to our children's education
- Promoting positive use of our child's time at home and in the community
- Staying informed about our child's education and communicating with the school by promptly reading all notices from the school or the school district either received by my child or by mail and responding, as appropriate

XYZ Elementary School families are able to participate in our school by:

- Advocating for our children
- Attending school events such as Open House, musical performances, field day, etc.
- Attending PTO meetings
- Volunteering as a reading tutor or mentor
- Assisting in an area of the school such as:
    - classrooms
    - library
    - school store
    - cafeteria
    - book fairs
- Helping to review Title I plan and compact
- Participating on XYZ County Schools District committees
- Attending School Board meetings

Parent(s)/Guardian(s) Signature: _____ **Date**_____

_____ **Date**_____

Student Responsibilities

Students will share the responsibility to improve our academic achievement and achieve the state's high standards. Specifically, I will:

- Take responsibility for my own behavior
- Come to school with supplies, ready to learn and determined to do my best
- Cooperate, listen, follow directions and ask for help when I need it
- Complete and return all homework assignments
- Read every day outside of school time
- Return all materials that require a parent's signature
- Respect other students, adults and their property
- Take care of my school and do what I can to make it better

Student's Signature: _____ **Grade:**_____ **Date**:_____

08/201

SAMPLE

Parents'/Guardians' Rights Notification

Parents/Guardians in the _____ School District have the right to learn about the following qualifications of their child's teacher: state licensure requirements for the grade level and content areas taught, the current licensing status of your child's teacher, and baccalaureate/graduate certification/degree. You may also request the qualifications of an instructional paraprofessional who serves your student in a Title I program or if your school operates a schoolwide Title I program. Parents/Guardians may request this information from the Office of the Superintendent by calling _____ or by sending a letter of request to the Office of the Superintendent, Street Address, State, Zip.

The _____ School District ensures that parents will be notified in writing if their child has been assigned, or has been taught by a teacher for four or more consecutive weeks by a teacher who is not considered highly qualified.

(This notice may be posted on the web or placed in the student handbook or newsletter.)

Parent Notification Letter

Non-Highly Qualified Teacher

(Includes Substitute for More than Four Weeks)

February 26, 2011

Dear Parents and Guardians:

The No Child Left Behind Act of 2001 (NCLB) is designed to ensure that all children have opportunities to be successful in school and to obtain a quality education. As part of NCLB each state and school district must develop plans for all children to be taught by "highly qualified" teachers. According to this law, a highly qualified teacher is one who is certified or licensed, holds a bachelor's degree, and has demonstrated knowledge and skills in the area he or she teaches. Also, the law requires parents to be informed when their children are not taught by a "highly qualified" teacher.

We are fortunate that Mrs. _____ has agreed to t substitute for Mrs. _____ for several weeks this spring. Although Mrs. _____ is a college graduate and a certified teacher, she does not meet the federal definition of "highly qualified". Her certification is for elementary education not early childhood. Despite this technicality, I am confident that quality instruction will continue during Mrs. _____'s absence for maternity leave.

If you have any questions about this letter, please feel free to contact your child's principal, _____, or me at the school district office. We welcome the opportunity to discuss NCLB with you and are confident your child will receive quality instruction during the time Mrs. _____ teaches in your child's classroom.

Sincerely,

Title I Coordinator

SAMPLE

Parent Involvement Survey 20__-20__

The following statements will encourage you to reflect on family issues at your school. Please rate your school in the following areas. Check your responses.

***Your school or school district*:**	**Rarely**	**Some-times**	**Regularly**	**Always**
1. Recognizes that all parents, regardless of income, educational level, or cultural background, want their children to do well in school and are involved in their children's learning.				
2. Supplies a written Title I parent involvement policy that is jointly developed with parents that outlines the partnership among the student, parent, and school.				
3. Holds an annual meeting to inform parents of children in Title I programs about the Title I program.				
4. Provides resources such as books, videos, and newsletters that help with better parent participation at home.				
5. Encourages and provides opportunities for parental input into the design and development of the school-parent compact.				
6. Schedules varied meeting times to accommodate parents' work and childcare schedules.				
7. Provides parents with ideas on how to help their children with homework.				
8. Thinks of the community as an extension of the family.				
9. Provides opportunities for parents to have input in the operations of the school.				
10. Staff sees how diversity may be used to enrich learning experiences for students.				
11. Uses information from parent and family surveys to design or change school procedures and programs.				

Please comment on each of these issues.

1. I would recommend the following changes for how the school communicates with families:
2. I would recommend the following changes for the Title I services my child is receiving:
3. I would recommend these changes for the Title I parent involvement policy:
4. Please list other ways that the district can help support you in your efforts to support your child's academic and social success:
5. Please list other comments or concerns here:

Parental Involvement Feedback Example

PARENT COMMENTS

Comments and suggestions made by parents are important to the planning, design and implementation of the Title I School-wide programs.

A. Comments and suggestions made by parents will be forwarded to the Assistant Superintendent for Federal Programs.

B. Comments and suggestions related to individual school-wide programs will be directed to the appropriate principal.

C. Responses may be given

   1. verbally (in person, in a meeting, by telephone)
   2. by note or letter
   3. in a newsletter

D. If the Title I School-wide plan is not satisfactory to parents of participating children, the LEA shall submit any negative parent comments with the plans part of its submission to the State Department of Education.

E. Parent comments will be submitted with the School-wide plan as part of its submission only if the plan is not satisfactory to parents of participating children.

SAMPLE

Title I Parent Meeting

November 21, 2006

District Office Board Room

11:30 a.m.

AGENDA

I. So what is AYP?

- Adequate Yearly Progress
- Why does the amount needed to be gained get larger

II. School Choice vs. District Choice

- What is it? (2 yrs.)
- Why not all schools?
- Reasons for identification.
- What is district choice?
- Why do some parents get their child transported by the district?
- What about space? Do they have room for my child?
- Why do I have to put 2 or 3 choices?
- How long do I get to choose?
- What is the district doing to help?
- How to learn about child's academics

III. What happens if I try to help at my child's home school, but the school doesn't improve?

- School Choice
- Supplemental services

- Title I funding to the schoolwide program
- Corrective action
    - reconstitute staff
    - withhold funds
    - decrease of decision-making capacity at the school

IV. Test scores

- What do they mean?
- Who will talk with me about them and when?
- If I need to come to school at a time before 8:00 or after 3:00 may I?

V. District and school parenting policies

- Parent conferences
- Reports on the progress of your child
- Opportunities to volunteer
- Access to the school

VI. School compacts

- Open door policy/Safety
- What do they say?
- What do they need to say?

VII. Parenting program

- What are parenting activities?
- Are the parenting activities provided for you helpful?
- Can we provide other information or activities for you?

VIII. What is a coach?

- Serves teachers
- Promotes developmental literacy education for all students

- Other coaches technology, science, math and social studies

IX. What are highly qualified teachers?

X. What can a teaching assistant do?

- What is their level of training?
- Who plans with her?

XI. What is a schoolwide planning team?

- How to volunteer to be a member
- How to give input into the plan

XII. What is scientifically-based research?

XII. What is a sub-group and why do we have them?

- Ethnic groups
- Low economic status
- Students with disabilities
- Limited English

Suggested Schedule of Parent Involvement Practices

September

- Explanation of School Title I Program
- Title I Districts-School Parental Involvement Policies & School Parent Compact
- Annual Parent Meeting
- Volunteering programs

October

Parent-teacher Conferences

February

- Planning Team Meeting
- Review programs
- Review funding
- Review needs
- Review research
- Seek parental input

March

- Final preparations for PASS and other annual testing programs

April

- Annual Review Meeting

May

- Summary of Annual Review
- Planning team finalizes reviews and parent involvement activities for upcoming project

June

- School project application is submitted to the State office

The Education for Homeless Children and Youth and the Coordination with Title I, Part A of No Child Left Behind

Title I Non-Regulatory Guidance: http://ed.sc.gov/agency/programs-services/87/documents/Title_I_Homeless.pdf

Education for Homeless Children and Youth Programs

Who is Homeless?

The term "homeless children and youth" means *individuals who lack a fixed, regular, and adequate nighttime residence.* The definition includes children and youth who are:

- sharing the housing of other persons due to loss of housing (aka "doubling up"), economic hardships, or a similar reason;
- living in motels, hotels, trailer parks, or camping grounds due to lack of alternative adequate accommodations;
- living in emergency or transitional shelters;
- abandoned in hospitals;
- awaiting foster care placement (children who are already in foster care are not considered homeless);
- have a primary nighttime residence that is a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings;
- living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings; and
- migratory children who qualify as homeless because they are living in circumstances described above.

District Liaison and Their Responsibilities

Every district in the state, whether or not it receives a McKinney-Vento sub-grant, is required to designate a district liaison.

The district liaison serves as one of the primary contacts between homeless families and school staff, district personnel, shelter workers, and other service providers. The district liaison coordinates services to ensure that homeless children and youth enroll in school and have the opportunity to succeed academically.

District liaisons must ensure that:

- Homeless children and youth are identified by school personnel and through coordination activities with other entities and agencies;

- Homeless students enroll in, and have full and equal opportunity to succeed in, the schools of the district;
- Homeless children and youth and their families receive educational services for which they are eligible, including Head Start, Even Start, and preschool programs administered by the district, and referrals to health, mental health, dental, and other appropriate services;
- Parents or guardians of homeless children and youth are informed of educational and related opportunities available to their children, and are provided with meaningful opportunities to participate in the education of their children;
- Parents and guardians and unaccompanied youth are fully informed of all transportation services, including transportation to and from the school of origin, and are assisted in accessing transportation services;
- Enrollment disputes are mediated in accordance with the requirements of the McKinney-Vento Act; and
- Public notice of the educational rights of homeless students is disseminated to locations where they receive services under the McKinney-Vento Act.

In meeting these responsibilities, district liaisons must assist homeless children and youth with such activities as the following:

- Enrolling in school and accessing school services;
- Obtaining immunizations or medical records;
- Informing parents, school personnel, and others of the rights of homeless children and youth;
- Working with school staff to make sure that homeless children and youth are immediately enrolled in school pending resolution of disputes that might arise over school enrollment or placement;
- Helping to coordinate transportation services for homeless children and youth; and
- Collaborating and coordinating with the State Coordinator for the Education of Homeless Children and Youth and community and school personnel responsible for providing education and related support services to homeless children and youth.

For a list of the district Homeless liaisons go to http://ed.sc.gov/agency/programs-services/87/documents/McKinney-VentoDistrictLiaisons2012.pdf.

Coordination with Title I, Part A of NCLB and the Education for Homeless Children and Youth

Homeless children and youth are automatically eligible for services under Title I, Part A of NCLB, whether or not they live in a Title I school attendance area or meet the academic standards required of other children for eligibility. Homeless children and youth may receive Title I educational or support services from Schoolwide and Targeted Assistance school programs.

Comparable and Coordinated Services

A district in a participating state must provide services to each homeless child and youth that is comparable to services offered to other students in the district. These services include public pre-school programs, and educational programs or services for which a homeless student meets the eligibility criteria, such as programs for children with disabilities, programs for students with limited English proficiency, vocational education, programs for gifted and talented students, before-and after-school programs, school nutrition programs, and transportation.

Districts are responsible for coordinating with local social service agencies and other service providers and programs, including programs under the Runaway and Homeless Youth Act (42 U.S.C. 5701 et seq.), and with other districts on issues such as transportation and the transfer of records. Additionally, they must coordinate with housing assistance providers. The purpose of this coordination is to ensure that eligible students have access and reasonable proximity to available education and related support services. It is also important to coordinate efforts in order to raise the awareness of school personnel and service providers of the effects of homelessness and the challenges that homeless students face.

Specifically, an LEA must reserve such funds as are necessary to provide services to homeless students who attend non-Title I schools that are comparable to those provided to students in Title I schools. These services may include providing educationally related support services to homeless children in shelters and other locations where they may live (ESEA section 1113(c)(3)(A)). The following sections provide additional information about allowable expenditures.

Title I District Plans

A district receiving Title I, Part A funds must include in its local plan a description of how the plan is coordinated with the McKinney-Vento Act. The local plan must describe services provided to homeless children. This information must be entered in the Title I online application as listed below:

- Question 1 on page 5
- Question 6, bullet 2, on page 6

Title I District Set-Aside for Homeless Students

A district must provide comparable services to a homeless student who does not attend a Title I school. The district may, for instance, provide support services to children in shelters and other locations where homeless children live. Services should be provided to assist homeless students to effectively take advantage of educational opportunities. This provision applies to homeless students in public and private schools, institutions for neglected children and, where appropriate, local institutions such as local community day school programs.

Title I mandates that school districts set aside a portion of their Title I funds to provide these comparable services to homeless students in non-Title I schools. The legislation does not mandate a specific calculation method or amount. The No Child Left Behind Financial Compliance Insider provides four sample methods for calculating the required district set aside for homeless students. (http://www.serve.org/nche/downloads/calculating_setasides.pdf) These methods include:

1. Identify homeless students' needs, and fund accordingly.
2. Obtain count of homeless students and multiply by Title I, Part A per-pupil allocation.
3. Reserve an amount of funds greater than or equal to the amount of your McKinney-Vento sub-grant request.
4. Reserve a specific percentage based on your district's poverty level or total Title I, Part A allocation.

Use of Title I, Part A Funds to Provide Services to Homeless Students

An LEA may use funds reserved under this section to provide services to eligible homeless students in both Title I and non-Title I schools that are comparable to services provided to non-homeless students in Title I schools. Services provided should assist such children in meeting the state's challenging academic content and academic achievement standards.

Title I, Part A funds must be used as a last resort when funds or services are not reasonably available from other public or private sources, such as the U.S. Department of Agriculture's free- and reduced-price school lunch program, public health clinics, or local discretionary funds (sometimes provided by the PTA) used to provide similar services for economically disadvantaged students. A district has the discretion to use reserved funds to provide a homeless student with services that are not ordinarily provided to other Title I students and that are not available from other sources. For example:

- Items of clothing, particularly if necessary to meet a school's dress or uniform requirement
- Clothing and shoes necessary to participate in physical education classes
- Student fees that are necessary to participate in the general education program
- Personal school supplies such as backpacks and notebooks

- Birth certificates necessary to enroll in school
- Immunizations
- Food
- Medical and dental services
- Eyeglasses and hearing aids
- Counseling services to address anxiety related to homelessness that is impeding learning
- Outreach services to students living in shelters, motels, and other temporary residences
- Extended learning time (before and after school, Saturday classes, summer school) to compensate for lack of quiet time for homework in shelters or other overcrowded living conditions
- Tutoring services, especially in shelters or other locations where homeless students live
- Parental involvement specifically oriented to reaching out to parents of homeless students
- Fees for AP(only for students ineligible for the waiver) and IB testing
- Fees for SAT/ACT testing (only for students ineligible for the waiver)
- GED testing for school-age students

Title I, Part A funds also may be used to support a homeless liaison. The McKinney-Vento Homeless Assistance Act (McKinney-Vento) requires each LEA in a state that receives McKinney-Vento funds to designate an appropriate staff person, who may also be a coordinator for other federal programs, as a liaison for homeless children. (MVHAA section 722(g)(1)(J)(ii)). Because the statute specifically authorizes that another federally funded coordinator may perform these duties, an individual paid, in whole or in part, with Title I, Part A funds, may also serve as a homeless liaison. **Title I, Part A funds may not be used to pay any portion of the salary of an individual who serves solely as the homeless liaison with no responsibility for any part of the Title I, Part A program.**

In line with the intent of Title I, Part A funds to be used to assist homeless children in meeting the state's challenging academic content and academic achievement standards, there are specific expenditures that are not allowed. Some examples of these expenditures are listed below.

- Rent for temporary lodgings until a homeless family or youth finds housing is not allowable.
- A class ring is not necessary to take advantage of educational opportunities nor does it assist a child in meeting a state's academic achievement standards. Therefore, it would not be an allowable use of the Title I, Part A funds.
- The cost of drivers' licensing test fees is not allowable. This would pertain to a homeless youth that would need to drive to a job after school in order to secure rent for his lodgings.
- The fees to enable students experiencing homelessness to participate in extracurricular activities after school such as band, sports/football, dance, and cheer-leading are not allowable.

With regard to graduation robes (for homeless students), the answer is more nuanced. If a district requires students to wear a graduation robe to participate in graduation activities, or if graduation robes are not required, but virtually all students wear them, generally Title I funds may be used. However, if the district has a policy for any student who cannot afford to rent or buy the graduation robe, this policy should also apply to a student experiencing homelessness who cannot afford a robe. For example, if the district has a fund to provide graduation robes for low-income students, this fund should be used to provide a graduation robe for a student experiencing homelessness.

Transportation of Homeless Children and Youth, Title I and Title V, Part A

In general, districts may not use funds under Title I, Part A or Title V, Part A to transport homeless students to or from their school of origin. Transportation services to the school of origin are mandated under the McKinney-Vento Act's statute. The "no-supplanting" provisions in Title I and Title V prohibit those funds from being used to support activities that the district would otherwise be required to provide.

Homeless Child Who Becomes Permanently Housed

In general, a homeless child or youth that becomes permanently housed during a school year continues to remain eligible for Title I, Part A services for the remainder of that school year. This helps ensure educational stability for formerly homeless children. For example, it may be appropriate in certain circumstances for a district to use Title I, Part A funds to transport *formerly* homeless students to or from their school of origin for the remainder of the school year in which they become permanently housed. (However, the Title I supplanting prohibition prohibits an LEA from using Title I, Part A funds to transport homeless students to or from their school of origin.)

The State's Academic Assessment System and Homeless Students

The final regulations that implemented changes to the standards and assessment requirements of Title I, Part A require states to include homeless students in their academic assessment, reporting, and accountability systems, consistent with section 1111(b)(3)(C)(xi) of NCLB. Assessments of homeless students are to be included in school district or in state accountability systems when students have been in a school for a full academic year. However, states are not required to disaggregate, as a separate category, the assessment results of homeless students. As homeless children and youth fall at the low end of the poverty continuum, districts and states should include the assessments of homeless students in the economically disadvantaged category of disaggregation, in addition to other applicable categories (e.g., the "all student category").

Documentation of Free Meal Eligibility for Homeless Children

To expedite the delivery of nutritional benefits, school officials may accept documentation that the children are homeless from the local educational liaison or directors of homeless shelters where the children reside. Documentation to substantiate free meal eligibility must consist of the child's name or a list of names, effective date(s), and the signature of the local educational liaison or the director of

the homeless shelter. This documentation is acceptable in lieu of a free and reduced price meal application.

To implement these expedited procedures, school officials must work closely with the educational liaison and directors of homeless shelters to ensure that children are provided free meal benefits as promptly as possible, as well as to ensure that the school food service is promptly advised when children leave the school or are no longer considered homeless. In the latter case, school officials must provide the household with an application for free and reduced price meals.

Homeless Children Residing with Another Household

A child or family may temporarily reside with another household and still be considered homeless under the definition of homeless in the McKinney-Vento Homeless Assistance Act. In these cases, the household size and income of the host family is not taken into consideration in determining the free meal eligibility for the child(ren) designated as homeless by the local educational agency liaison.

Additionally, when a host family applies for free and reduced price meals for their own children, the host family may include the homeless family as household members if the host family provides financial support to the homeless family, such as shelter, utilities, clothing or food. In such cases, the host family must also include any income received by the homeless family. School officials must determine eligibility for the host family in the traditional manner. However, free meal eligibility for the homeless child is based on the documentation provided by the local education liaison, even when the child is included on the host family's free and reduced price meal application. If the host family meets the free or reduced price meal eligibility criteria, school officials should provide the host family with temporary approval for free or reduced price meal benefits, as appropriate. The host family's eligibility should be reevaluated when their household size decreases, i.e., the homeless family leaves.

Definition of School of Origin

The **school of origin** is the school that the child or youth attended when permanently housed or the school in which the child or youth was last enrolled.

School Placement Determinations for Homeless Children and Youth

Homeless children and youth frequently move, and maintaining a stable school environment is critical to their success in school. To ensure this stability, districts must make school placement determinations on the basis of the "best interest" of the homeless child or youth. Using this standard, a district must

- Continue the child's or youth's education in the **school of origin** for the duration of homelessness when a family becomes homeless between academic years or during an

academic year; or for the remainder of the academic year if the child or youth becomes permanently housed during an academic year; **or**

- Enroll the child or youth in any public school that non-homeless students who live in the attendance area in which the child or youth is actually living are eligible to attend.

To the extent feasible, a district must educate a homeless child or youth in his or her **school of origin**, unless doing so is contrary to the wishes of the parent or guardian. The placement determination should be a student-centered, individualized determination. Factors that a district may consider include the age of the child or youth; the distance of a commute and the impact it may have on the student's education; personal safety issues; a student's need for special instruction (e.g., special education and related services); the length of anticipated stay in a temporary shelter or other temporary location; and the time remaining in the school year.

Steps to Ensure Immediate Enrollment by Districts

Homeless children and youth often do not have the documents ordinarily required for school enrollment. Enrolling them in school immediately provides these children and youth needed stability and also is a legal requirement. To facilitate immediate enrollment, districts should consider the following practices:

- Train all school enrollment staff, secretaries, guidance counselors, school social workers, and principals on the legal requirements regarding immediate enrollment;
- Review all regulations and policies to ensure that they comply with the McKinney-Vento requirements;
- Develop affidavits of residence or other forms to replace typical proof of residency. Such forms should be carefully crafted so that they do not create further barriers or delay enrollment;
- Develop caregiver affidavits, enrollment forms for unaccompanied youth, and other forms to replace typical proof of guardianship. Again, such forms should be carefully crafted so they do not create further barriers or delay enrollment;
- Establish school-based immunization clinics or other opportunities for on-site immunizations; collaborate with community-based or public agencies to provide school uniforms within a district and among neighboring districts;
- Accept school records directly from families and youth;
- Contact the previous school for records and assistance with placement decisions;
- Develop short educational assessments to place students immediately while awaiting complete academic records;
- Inform families and youth in a language they can understand or in an accessible format, as appropriate, of their right to attend either their school of origin or local school;

- Inform families and youth in a language they can understand or in an accessible format, as appropriate, of their right to transportation and immediate enrollment;
- Develop clear, understandable, and accessible forms for written explanations of decisions and the right to appeal; and
- Expeditiously follow up on any special education and language assistance referrals or services.

Assistance to Homeless Unaccompanied Youth to Access Educational Services

Local liaisons assist unaccompanied youth in accessing educational services through such activities as:

- Helping unaccompanied youth choose and enroll in a school, after considering the youth's wishes;
- Providing unaccompanied youth with notice of their appeal rights in a language they can understand or in an accessible format;
- Informing youth of their right to transportation to and from the school of origin, and assisting unaccompanied youth in accessing transportation; and
- Ensuring that unaccompanied youth are immediately enrolled in school pending the resolution of disputes.

Assistance by District Liaison of Homeless Families in Enrolling Their Children in a Preschool Program with a Waiting List

The district liaison should work with preschool program staff to remind them how important their services are for homeless children and to inform them of how waiting lists often create barriers for homeless families who wish to enroll their children. Some preschool programs keep slots open specifically for homeless children.

Procedures for a Dispute Concerning Placement of a Homeless Child or Youth between a School and Parent or Guardian

If a dispute arises over school selection or enrollment, the district must immediately enroll the homeless student in the school in which enrollment is sought by the parent or guardian, pending resolution of the dispute. Similar provisions apply to placement of unaccompanied youth. Inter-district enrollment disputes should be resolved at the state level.

Homeless families and youth may be unaware of their right to challenge placement and enrollment decisions. Therefore, the district must provide the parent, guardian, or unaccompanied youth with a

written statement of the school placement decision and the appeal rights. The district must refer the unaccompanied youth, parent, or guardian to the district liaison, who must expeditiously carry out the dispute resolution process.

When enrollment disputes arise, it is critical that students not be kept out of school. Interruption in education can severely disrupt the student's academic progress. To avoid such disruptions, districts need an established process for resolving school placement disputes. Permitting students to enroll immediately in the school of choice pending resolution of disputes helps provide needed stability.

District homeless liaisons help ensure that disputes are resolved objectively and expeditiously. Written notice protects both students and schools by outlining the specific reasons for the school's decision. It facilitates dispute resolution by providing decision-makers with documents to guide their determinations.

Effective Strategies for Districts to Use to Resolve Enrollment Disputes

A district should consider the following strategies for effectively resolving school enrollment disputes:

- Disputes should be resolved at the district level rather than the school level;
- When inter-district issues arise, representatives from all involved districts and the South Carolina Department of Education should be present to resolve the dispute;
- A state-level appeal process, involving the State Coordinator, should be available for appeals of district-level decisions and resolution of inter-district disputes;
- The dispute resolution process should be as informal and accessible as possible, and allow for impartial and complete review;
- Parents, guardians, and unaccompanied youth should be able to initiate the dispute resolution process directly at the school they choose, as well as at the district or district homeless liaison's office;
- States should establish timelines to resolve disputes at the local and state level;
- Parents, guardians, and unaccompanied youth should be informed that they can provide written or oral documentation to support their position;
- Students should be provided with all services for which they are eligible while disputes are resolved;
- Written notice should be complete, as brief as possible, simply stated, and provided in a language the parent, guardian, or unaccompanied youth can understand. The notice should include:
    1. Contact information for the district homeless liaison and State Coordinator, with a brief description of their roles;

2. A simple, detachable form that parents, guardians, or unaccompanied youth can complete and turn in to the school to initiate the dispute process. (The school should copy the form and return the copy to the parent, guardian or youth for their records when it is submitted);
3. A step-by-step description of how to dispute the school's decision;
4. Notice of the right to enroll immediately in the school of choice pending resolution of the dispute;
5. Notice that "immediate enrollment" includes full participation in all school activities;
6. Notice of the right to appeal to the state if the district-level resolution is not satisfactory; and
7. Timelines for resolving district- and state-level appeals.

Naturally Occurring Disasters and McKinney-Vento Act

When children and their families are displaced from their housing as a result of a natural disaster, there is often a period of instability in which various private organizations and local, state, and federal agencies provide assistance. The South Carolina Department of Education and districts should determine such children's eligibility for McKinney-Vento services on a case-by-case basis. In making this determination, they should take into consideration the services that are available through these other sources.

Following a disaster, one of the district's first priorities is to re-open impacted schools as soon as possible and take steps to normalize school routines. Districts should then proceed to examine whether children who have been displaced by the natural disaster are eligible for McKinney-Vento services on a case-by-case basis. In such circumstances, the U.S. Department of Education would provide technical assistance and other assistance, as available, to help the district.

Transportation Responsibilities for Districts and the State Department of Education

The South Carolina Department of Education and districts are responsible for reviewing and revising policies including transportation policies that may act as barriers to the enrollment and retention of homeless children and youth in schools in the State. Under the McKinney-Vento Act, homeless children and youth are entitled to receive the transportation and other services that are available to non-homeless students.

The South Carolina Department of Education and districts must adopt policies and practices to ensure that transportation is provided, at the request of the parent or guardian (or, in the case of an unaccompanied youth, the liaison), to or from the **school of origin** in accordance with the following requirements:

- If the homeless child or youth continues to live in the area served by the district in which the **school of origin** is located, that district must provide or arrange for the child's or youth's transportation to or from the **school of origin**.
- If the homeless child or youth continues his or her education in the **school of origin** but begins living in an area served by another district, the district of origin and the district in which the homeless child or youth is living must agree upon a method to apportion the responsibility and costs for providing the child with transportation to and from the school of origin. If the districts cannot agree upon a method, the responsibility and costs for transportation are to be shared equally.

(However, the Title I supplanting prohibition prohibits an LEA from using Title I, Part A funds to transport homeless students to or from their school of origin.)

District transportation responsibilities apply to all districts in the state, not just to those districts that receive a McKinney-Vento sub-grant.

Involvement in the Development and Implementation of District Policy for Transportation of Homeless Students

School districts can best address the transportation needs of homeless and other highly mobile students through a team approach. However, based on the best interest of the student and in consultation with the parent, the district ultimately determines the mode of transportation. The district's transportation director is a key figure in the process and should work with district leadership, the local liaison for homeless students, neighboring districts, and homeless service providers to develop effective transportation policies and procedures.

Inter-district Transfers and Transportation

Districts should have in place inter-district (and inter-state, where appropriate) agreements that address potential transportation issues that may arise as homeless students transfer from one district to another.

Transportation of Non-homeless and Homeless Students

A district that does not provide transportation to non-homeless students is still required to transport homeless students. The statute not only requires a district to provide comparable services, including transportation services, to homeless students, it also requires a district, at the request of a parent or guardian, to provide or arrange for transportation to and from the school of origin.

Transportation for Homeless Children Attending Pre-school

To the extent a district offers a public preschool education, McKinney-Vento requires that homeless children have equal access to that preschool education as provided to non-homeless children.

Furthermore, the statue requires that the services provided to homeless children be comparable to those provided to non-homeless children. Thus, if a district provides transportation for non-homeless preschool children, it must also provide comparable transportation services for homeless preschool children.

Transportation and Disputes Being Resolved

The McKinney-Vento Act's transportation requirements apply while disputes are being resolved. Therefore, at the request of the parent or guardian (or in the case of an unaccompanied youth, the liaison), the district must provide or arrange for transportation to and from the school of origin. Inter-district transportation disputes should be resolved at the State level.

Resources

The National Center for Homeless Education is an excellent resource for local homeless liaisons and Title I administrators. The Center's Website is located at http://center.serve.org/nche/products.php. The Local Homeless Education Liaison Toolkit located at http://center.serve.org/nche/downloads/toolkit/toolkit.pdf includes many tools essential for an effective homeless program. The information on the next page is an example of a tool that may be found in the Local Homeless Education Liaison Toolkit.

Information for Parents

If your family lives in any of the following situations:

- In a shelter, motel, vehicle, or campground
- On the street
- In an abandoned building, trailer, or other inadequate accommodations, or
- Doubled up with friends or relatives because you cannot find or afford housing

Then, your preschool-aged and school-aged children have certain rights or protections under the McKinney-Vento Homeless Education Assistance Act.

Your children have the right to:

- Go to school, no matter where you live or how long you have lived there. They must be given access to the same public education, including preschool education, provided to other children.
- Continue in the school they attended before you became homeless or the school they last attended, if that is your choice and is feasible. If a school sends your child to a school other than the one you request, the school must provide you with a written explanation and offer you the right to appeal the decision.
- Receive transportation to the school they attended before your family became homeless or the school they last attended, if you or a guardian requests such transportation.
- Attend a school and participate in school programs with children who are not homeless. Children cannot be separated from the regular school program because they are homeless.
- Enroll in school without giving a permanent address. Schools cannot require proof of residency that might prevent or delay school enrollment.
- Enroll and attend classes while the school arranges for the transfer of school and immunization records or any other documents required for enrollment.
- Enroll and attend classes in the school of your choice even while the school and you seek to resolve a dispute over enrolling your children.
- Receive the same special programs and services, if needed, as provided to all other children served in these programs.
- Receive transportation to school and to school programs.

When you move, you should do the following:

- Contact the school district's local liaison for homeless education (see phone number below) for help in enrolling your child in a new school or arranging for your child to continue in his or her former school. (Or, someone at a shelter, social services office, or the school can direct you to the person you need to contact.)

- Contact the school and provide any information you think will assist the teachers in helping your child adjust to new circumstances.
- Ask the local liaison for homeless education, the shelter provider, or a social worker for assistance with clothing and supplies, if needed.

Local Area Contacts:

(Insert district liaison contact information)

State Coordinator:

Linda Mirabal-Pace
803-734-6010
lpace@ed.sc.gov

If you need further assistance, call the National Center for Homeless Education at the toll-free Help Line number,

800-308-2145

Title I Equipment and Inventory Control and Tracking Procedures

Title I Equipment Inventory Control and Tracking Procedures

Purpose

To ensure the maintenance and implementation of adequate controls to account for the procurement, location, custody, and security of equipment purchased with Title I funds. For this procedure, equipment has been defined as "non-consumable items with a life expectancy of more than one year and with a value that exceeds $200.00."

The following procedures were developed as a result of the June 2006 U.S. Department of Education's review of the South Carolina Title I program. Procedures are based on Office of Management and Budget (OMB) Circular A-87, Education Department General Administrative Regulations (EDGAR), and SC Budget and Control Board Procurement Regulations.

Physical Inventory Listing

Each LEA Title I Office and Title I school will maintain a current and accurate inventory record of equipment purchased with Title I funds (*a Physical Inventory Listing*). This Physical Inventory Listing will include equipment that is non-consumable with a life of more than one year and with a value of more than $200.00. (*This Physical Inventory Listing is in addition to the LEA's fixed asset inventory listing.)* Equipment purchased using district set-aside Title I funds will be listed on the district's Physical Inventory Listing. Equipment purchased using a school's Title I allocation will be listed on the school's Physical Inventory Listing. Items that would not be included on the physical inventory listing are books, classroom libraries, classroom/office supplies, workbooks, maps, charts, globes, CD's, and DVD's. Items that must be included are printers, computers, digital cameras, laptops, fax machines, and office/classroom furniture.

The Physical Inventory Listing should include the following information:

- An inventory control number to include the fixed asset identification number or other inventory control number for items not listed on the fixed asset system,
- A description to include the model number,
- The acquisition date
- The cost
- A serial number, and
- The location (office and room number).

The Title I schools, Title I district-wide programs, and Title I district office must ensure that items are added to the Physical Inventory Listing throughout the year as invoices are processed.

See Attachment 1 for an example of a physical inventory listing.

Fixed Asset Listing

The Title I Equipment Inventory Control Procedures will not alter the district's inventory control policy or equipment listed on the district's fixed asset inventory system.

See Attachment 2 for an example of a fixed asset listing.

Tagging of Equipment

Equipment purchased with Title I funds that are listed on the LEA fixed asset inventory system must have the appropriate asset identification tag/decal per the district's policy on tagging of equipment. The asset tag/decal should be placed on the equipment where it can be easily seen.

Title I equipment that has a useful life of at least one year, and is not included on the fixed asset system, will still need to have a tag, decal, or label to indicate a control number designated by the Title I office or school.

Physical Inventory Listing Reconciliation to Fixed Asset Listing

A physical inventory of the equipment at each location (using the Physical Inventory Listing) must be taken and the results reconciled with the fixed asset listing at least once annually. Documentation of the reconciliation and any adjustments to entries to account for the differences noted during the reconciliation should be maintained.

As a part of the reconciliation process, district Title I Coordinators are urged to also run expenditure reports to ensure that all required equipment, supplies, and material items have been added to the physical inventory listing for each location.

See Attachment 1-A for an example of a physical inventory listing.

Record Maintenance

Appropriate equipment transfer forms and disposal forms for the fixed asset listing should be completed in a timely manner and maintained to document any transfer or disposal of equipment (following the LEA policy).

Any mobile equipment, such as laptop computers, should have an equipment Check-Out form to document that the equipment has been removed from its location as indicated on the Physical Inventory Listing.

When equipment not on the fixed asset listing is transferred from one location to another, an Equipment Transfer Form should be completed to document that the equipment has been removed from one Physical Inventory Listing and added to another.

See Attachment 3 and 4 for an example of a Check-Out and Transfer form.

Title I Equipment Inventory Control Procedure
Equipment Check-Out Form

Description of Equipment:_____

Model: :_____

Title I Inventory Control Number or Fixed Asset Number:_____

Location:_____

The above equipment is being issued to you for official use only. By signing below you acknowledge responsibility for this equipment and its use while in your possession.

_____ _____

Name **Signature**

_____

Position

_____ _____

Check-Out Date **Return Date**

Attachment 3

Title I Equipment Inventory Control Procedure
Equipment Transfer Form

Description of Equipment:_____

Model:_____

Title I Inventory Control Number or Fixed Asset Number:_____

Location Prior to Transfer:_____

Location After Transfer:_____

_____

Surrendering Location **Director / Principal Signature** **Date**

_____

Receiving Location **Director / Principal Signature** **Date**

Attachment 4

Declaration of Intent to Dispose of Equipment

Department of Education

Decal Number: _____

Location: _____

Description of Equipment: _____

Approximate Age: _____ Acquisition Cost: _____

Estimate of Fair Market Value or Trade-in Value: _____

Condition of Equipment: _____

☐ TRADE-IN ☐ SURPLUS

Approved by: _____ _____
Office Director's Signature Date

_____ _____
Vendor's Signature Date

_____ _____
*Material Management Officer's Signature Date

(Surplus Only – Check One)

☐ "Like equipment" will not be purchased in current fiscal year. Remit sales proceeds to General Fund.

☐ "Like equipment" will be purchased in current fiscal year. Remit proceeds to Department of Education.

***Signature required only if the Estimate of Fair Market Value or Trade-in is greater than or equal to $500.**
FA2

Title I and Charter Schools

Title I Non-Regulatory Guidance: http://ed.sc.gov/agency/programs-services/77/documents/Charter_School_Guidance.pdf

Title I and Charter Schools

Charter schools in South Carolina are public schools. These charter schools may either be a public school in the district in which the school is geographically located or are a public school in the statewide charter school district. Charter schools may qualify for Title I funds as any other participating public school in either district.

Information on Programs that the Charter School May be Eligible

Upon receiving notice, the local school district or the statewide charter school district must provide the charter school with *timely and meaningful information* about any program for which the charter school may be eligible. **Districts should provide timely information about Title I eligibility to charter schools.**

District Flexibility in Obtaining Poverty Data for New or Expanding Charter Schools

In Title where the statutory allocation formulas rely on data from a prior year, **a charter school that does not have prior year data because it is opening for the first time cannot be denied funding on that basis.**

If enrollment and poverty data for a new or expanding charter school are not available at the same time that such data are collected for other public schools within the local school district or the statewide charter school district (e.g., the charter school has not yet opened or expanded), a district may use the same data collected at a different time of the year to determine the charter school's eligibility for, and allocation of, Title I funds. For example, a district that uses enrollment and free-lunch data collected in March 2008 to determine allocations for the 2008–09 school year may use charter school data collected at a later date to determine the public charter school's Title I eligibility and allocation.

Determination of Poverty Percentage for Charter Schools if Free/Reduced Poverty Data is not Available

The *No Child Left Behind Act of 2001* states that a district must determine the poverty percentage and rank by poverty percentage all public schools, including charter schools, in the district on an annual basis.

Failure of the district to rank its schools based on poverty percentage or the failure of the charter school to provide the necessary data needed for the district to rank its schools could jeopardize federal funds received by the district and/or the charter school.

Generally in South Carolina, this poverty school ranking has been determined by the percentage of children enrolled in each school who are eligible to receive a free or reduced-priced lunch based on the National School Lunch program.

If a district's charter school(s) does not participate in the National School Lunch program, there are two options for determining the poverty percentage of charter schools which the district can choose.

The district's choice of method must be used consistently across the district beginning in 2008–09 in all charter schools sponsored by that district for the annual ranking.

OPTION ONE: Parent Surveys

- Until recently, this option was the only approved method for the collection of poverty data in charter schools.
- This is a collection of comparable data through parent surveys to determine which students enrolled in the charter school are from low-income families. This determination is based on the income levels of the parents. (This method is also authorized to be used to determine the poverty level in private schools.)
- For this method, the charter school would distribute and collect the parent surveys for the district within the timeframe established by the district.

Steps in using Parents Surveys

1. The district provides the charter school(s) with a parent letter and the parent survey. The district requests the charter school(s) send the letter and survey to the students' parents. This ensures that the district can obtain poverty data comparable to those used for public school children. The district sets a due date for the charter school(s) to return the surveys. The only information necessary for a district to collect is similar to the information collected by the district on free and reduced priced lunch forms.

   Sample parent surveys and letters can be found in the USDE's document, *Ensuring Equitable Services to Private School Children: A Title I Resource Tool Kit*, pages 65-71, located on-line at: www.ed.gov/programs/titleiparta/ps/titleitoolkit.pdf

2. The district determines the number of low-income students that a charter school has based on the parent surveys.

3. The district will use the information from the surveys to rank each charter school on Page 2 of the Title I application.

OPTION TWO: Proportionality

- The United States Department of Education (USDE) has offered this additional option in determining the poverty level for charter schools that do not participate in the National School Lunch Program.

- A district may use proportionality to infer the number of charter school students that would be eligible to receive a free or reduced-priced lunch.

- This method (which is also authorized to be used to determine the poverty level in private schools) applies the poverty percentage of the public school to the number of charter school students that reside in that school's attendance zone.

  For example: If ten of the charter school students reside in the attendance zone for Main Street Elementary (a school with 50 percent of its students eligible for a free or reduced-priced lunch), then this method would assume that five of these ten charter school students would be low income.

Steps for using Proportionality

1. Obtain a list of charter school students and their addresses from the charter school(s).

2. Determine from the charter school students' addresses what district public school they would attend if they were not attending the charter school.

3. Complete one form per charter school sponsored by that district. (See form at the back of this handout.)

    a. List the name of the school(s) in the **first column** that the students would have attended if they were not attending the charter school.

    b. Provide the poverty percentage for each school where charter students reside in column A.
    c. List the number of charter school students that would have attended the district school based on the information you obtained from step 1 and 2 in column B.
    d. Multiply columns A and B. This will provide the number of poor children at the charter school based on the poverty percentage of the district school they would have otherwise attended. **(Column A x Column B = Column C)** Then list that figure in column C.
    e. Divide the total number of poverty students from the charter school into the total charter school enrollment to obtain the percent poor of the charter school. **(Column C divided by Column B = Column D)**. Then list that figure in column D.
4. Use the figures obtained for each charter school in columns B, C, and D on page 2 of the Title I application page and rank the school appropriately.

Allocation of Title I Funds

In order to receive Title I funds, a new or expanding charter school must meet the same eligibility requirements as other public schools in the local school district or the statewide charter school district. To allocate Title I funds to schools, a district must first determine which schools (including charter schools) are eligible to participate. Generally, a school is eligible to participate in the Title I program if the percentage of children from low-income families residing in the school's attendance area or enrolled in the school is at least as high as the percentage of children from low-income families in the district as a whole, or is at least 35 percent.

- A district ranks all of its schools according to their percentages of poverty and allocates funds to eligible schools, in rank order according to those poverty percentages, based on

the number of poor children in each school. ***Charter schools in the district must be listed on page 2 of the Title I application and may qualify for Title I funds as any other participating public school in the school district.***

- In allocating Title I funds, an district must serve all schools above 75 percent poverty before serving any school with a poverty rate below 75 percent.

- After allocating funds to schools above 75 percent poverty, the district may serve lower-poverty schools either by continuing with the district-wide ranking or by ranking within grade-span groupings.

- Although a district is not required to allocate the same per-pupil amount to each school in its district, it may not allocate a higher amount per child to schools with lower poverty rates than to schools with higher poverty rates. ***If the charter school is eligible for Title I services and will be served, the charter school and its allocation must be listed on page 2d on the Title I application.***

- Depending on choices a district makes with regard to such issues as the per-pupil allocation for each school, grade-span groupings, and off-the-top reservations, as well as the amount of Title I funds a district receives, an eligible school may or may not receive Title I funding.

- A charter school, served by Title I in a district, may implement a Title I Targeted Assistance program or if eligible, may implement a Title I Schoolwide program. The application for Title I Targeted Assistance or Schoolwide program by the charter school would be included as part of the Title I application.

Districts must follow applicable program requirements when allocating funds to public schools, including charter schools, under Title I. While a district may use non-federal funds to supplement allocations to public schools that are reduced as a result of the district's compliance with the regulations, the district may not substitute non-federal funds for federal funds when awarding sub-grants under a covered program.

Charter Schools in the Statewide Charter School District

The South Carolina Department of Education will collect data from each charter school in the statewide charter school district to determine the Title I formula endorsed by the United States Department of Education. The Title I allocation for local school districts will be adjusted and reallocated to the statewide district based on the number of poverty charter students in the statewide district that reside in the local school district. Local school districts should prepare for such an adjustment, which may occur after preliminary Title I allocations have been distributed.

Definition of Significant Expansion of Enrollment

The regulations defines the term *significant expansion of enrollment* as a "substantial increase in the number of students attending a charter school due to a significant event that is unlikely to occur on a regular basis, such as the addition of one or more grades or educational programs in major curriculum areas." The requirements in the regulations are not triggered by minor increases in enrollment caused by normal turnover. Rather, the regulations apply to substantial increases in enrollment that are caused by significant, or unusual, events. A charter school for the performing arts, for example, may offer two educational programs that focus on music and art. If the charter school were to add a third educational program in dance, and the addition of that program resulted in a substantial increase in the number of students attending the charter school, then the district serving the charter school would be required to comply with the regulations when providing funds to the charter school under a program. It is not enough for a charter school to experience a significant event, but the event must also result in a substantial increase in the number of students attending the charter school. The increase must occur in the charter school's overall enrollment without regard to student eligibility for funds under a particular program. It should also be noted that the regulations give states unfettered discretion to determine any expansion of enrollment in a charter school to be *significant* within the meaning of the regulations. This authority does not extend to districts. Nor does it permit a state to treat a significant expansion of enrollment as insignificant in order to avoid its obligations under the regulations.

Allocation for New or Expanding Charter School

For a new or expanding charter school, local school districts or the statewide charter school districts must set aside Title I funds at the beginning of the school year based on projected enrollment data and then adjust the funds when actual enrollment is known. Districts need to be flexible in working with charter schools regarding their attendance data (initial vs. actual).

- For programs in which states and districts allocate funds by formula, a requirement that districts implement procedures that ensure that each charter school **opening for the first time or significantly expanding its enrollment on or before November 1** of an academic year receives the proportionate amount of funds for which it is eligible within five months of the date the charter school opens or significantly expands its enrollment;

- For each charter **school opening or significantly expanding its enrollment after November 1 but before February 1 of an academic year**, a requirement that districts implement procedures that ensure that the charter school receives at least a ***pro rata*** portion of the proportionate amount of funds for which the charter school is eligible on or before the date the state or districts allocates funds to other districts and public schools for the succeeding year;

- For each charter school **opening or significantly expanding its enrollment on or after February 1**, a provision permitting, but not requiring, districts to implement procedures to provide the charter school with a *pro rata* portion of the proportionate amount of funds for which the charter school is eligible under a covered program; and
- A general **prohibition** against districts relying on enrollment or eligibility data from a prior year in determining a charter school's eligibility to receive funds under a program during an academic year in which the charter school opens for the first time or significantly expands its enrollment, even if allocations to other districts or public schools are based on a prior year's data.

The South Carolina Department of Education shall ensure that every charter school receives the federal funding for which the charter school is eligible **no later than five months after the charter school first opens.**

Every charter school expanding its enrollment in any subsequent year of operation shall **receive the federal funding for which the charter school is eligible not later than five months after such expansion.**

Adjustments in Data and Allocations

If the local school district or the statewide charter school district provides funds to a new or expanding charter school based on projected data and, after the charter school opens or expands, actual enrollment or eligibility data show that the district has allocated more or fewer funds to the charter school than the amount for which the charter school was eligible, then the district must make appropriate adjustments to the allocation previously made to the charter school. The purpose of this requirement is to ensure that new and expanding charter schools receive the amount of funds for which they are eligible -- no more and no less.

Any required adjustments to allocations for a given academic year must be based on actual enrollment or eligibility data for the charter school on or after the date the charter school opens for the first time or significantly expands its enrollment. The adjustments may not be based on enrollment or eligibility data from a prior year, even if allocations to other districts and public schools under the program are based on a prior year's data.

A district may make adjustments immediately, when it makes the next year's allocations, or anytime in between.

When making adjustments to allocations, the district may use funds from the state's allocation under the applicable program for the academic year in which the charter school opened or expanded, or from the state's allocation under the program for the academic year immediately following the academic year in which the charter school opened or expanded.

Reallocation of Funds, if a Charter School Closes

Neither the law nor the regulations prescribe closeout or reallocation procedures for states or districts to follow if and when a charter school closes. Therefore, as a general rule, if a charter school that has received funds in accordance with these regulations closes, states and districts should follow the same procedures that are used to close out sub-grants and reallocate funds for other eligible entities under the applicable program.

Responsibility of the Charter School

Charter schools have four major responsibilities under the regulations.

- First, in order to receive funds in accordance with the regulations, a new or expanding charter school must notify the local school district or the statewide charter school district, in writing, at least 120 days in advance, of the date the charter school is scheduled to open or expand (this may be in the form of a school board agenda item or other charter approval process).

  A district that does not receive written notice of the date an eligible charter school is scheduled to open or expand (or the date the charter school opened or expanded) is not required to comply with the requirements in the regulations when providing funds to the charter school.

- Second, a charter school must establish its eligibility to receive funds under the particular program and comply with all program requirements.

- Third, upon request, a charter school that has not yet opened or expanded must provide the responsible state agency or district with any data or information available to the charter school that the district may reasonably need to estimate the amount of funds the charter school will be eligible to receive when it actually opens or expands.

- Fourth, once a charter school actually opens or expands, it must provide actual enrollment and eligibility data to the district. States have wide discretion in establishing procedures for charter schools to meet these requirements.

Failure by the Charter School to Comply with Requested Information

A charter school that has not yet opened or expanded must provide the district with any available data or information that the district *reasonably* requests to assist it in estimating the

charter school's projected enrollment. The district might request, for example, pre-registration lists or enrollment data from the prior academic year. While the charter school is not required to create any new data, once the charter school actually opens or expands, it is required to provide the district with actual enrollment and eligibility data. Under the regulations, the district may elect not to provide any funds to a new or expanding charter school until the charter school has provided the district with actual enrollment and eligibility data. **Prior to the withholding of funds, the district should notify the director of the Office of Federal and State Accountability.**

Major Responsibilities of States and Districts

The state agency, the local school district, and the statewide charter school district have two major responsibilities under the regulations.

- First, upon receiving written notice of the date a charter school is scheduled to open for the first time or significantly expand its enrollment, the district responsible for administering the program must provide the charter school with *timely and meaningful information* about each program in which the charter school may be eligible to participate (for a discussion of *timely and meaning information*.
- Second, states and districts are required to implement procedures that ensure the following:

  (a) That each charter school opening or expanding on or before November 1st of an academic year receives the proportionate amount of funds for which it is eligible within five months; and

  (b) That each charter school opening or expanding between November 1 and February 1 of an academic year receives at least a *pro rata* portion of the proportionate amount of funds for which it is eligible. The district must provide funds to these charter schools no later than the date the state or district allocates funds to other districts and public schools under the program for the succeeding academic year.

Although districts may choose to implement procedures to provide a *pro rata* portion of funds to eligible charter schools that open or expand after February 1 of an academic year, the regulations do not require them to do so. Districts that choose to provide funds to such charter schools may establish their own time frames for making the allocations, except that allocations must be made from applicable program funds allocated to the state or district for the academic year in which the charter school opens or expands or for the succeeding academic year.

The Charter School Authorizer

The “charter school authorizer” in South Carolina is considered to be the local school district or the statewide charter school district in which the charter application was approved by the district school board.

Charter Schools Identified as a Priority or Focus School

Charter Schools that are identified as priority and/or focus schools due to academic Performance is not eligible for support outlined for priority and/or focus schools.

School Choice Provision due to Accountability Indicator

If a charter school is identified as a Priority or Focus school, parents of students enrolled at the school must be notified of its status before the beginning of the school year following identification, just as parents of students enrolled in other public schools are notified. If a charter school is part of a district, then the district should notify parents of their options.

Districts (that authorize charter schools) must provide choice options to the charter school if it is identified by the state as a Priority or Focus school, and offer transportation to other public schools of choice within the district, even if a state’s charter law does not require that transportation funds be made available for charter schools.

Charter School as a District School Choice Option

A district may list charter schools under the district’s jurisdiction that have not been identified as a Priority or Focus school.

Supplemental Educational Services

As with other public schools, if a charter school is identified as a Priority or Focus school, students from low-income families who are enrolled in the school are eligible to receive supplemental educational services. The district must pay for such services on the same basis as it would pay for supplemental services for eligible students in any other school.

Applying to Become a Supplemental Education Services Provider

Charter schools that are not identified as a Priority or Focus school are eligible to become supplemental educational service providers pursuant to the Title I requirements.

Qualifications for Teachers in Charter Schools Based on NCLB

The law provides that a teacher who teaches core academic subjects in a charter school meets the certification requirement if he or she meets the requirements set forth in a state's charter school law regarding certification or licensure. Thus, a teacher in a charter school does not have to be licensed or certified by the state if the state's charter law does not require such licensure or certification. All other elements of the "highly qualified teacher" requirement apply to charter school teachers in the same way, and on the same timeline, that they apply to teachers in traditional public schools.

Qualifications for Paraprofessionals in Charter Schools Based on NCLB

Instructional paraprofessional hired to work in programs supported with Title I, Part A funds must

- Have a high school diploma or its recognized equivalent.
- Have at least two years of study at an institution of higher education, possess at least an associate's degree, or demonstrate subject-matter competence through a formal State or local assessment.

The paraprofessional qualifications requirements apply immediately to all paraprofessionals hired to work in Title I programs after the enactment of NCLB (January 8, 2002). Paraprofessionals hired prior to the enactment of NCLB were to meet the requirements by January 8, 2006. Therefore, all paraprofessionals in a charter school must meet the highly qualified requirement.

Paraprofessionals that perform non-instructional duties are not required to meet the regulation above including those who act as translators, conduct parent involvement activities providing technical support for computers, providing personal care services to students, or carrying out clerical functions.

These provisions of the law apply to charter schools in the same manner that they apply to traditional public schools.

If a charter school does not accept Title I funds, it does not have to comply with these requirements for paraprofessionals.

Comparability

Charter schools must be included in the local school district's comparability report.

Determination of Poverty Percentage for Charter Schools Using Proportionality

Name of District Sponsored Charter School:

_____

	A	B	C	D
Name Of District School	**Poverty Percent (from Page 2 of the Title I Application)**	**Charter School Enrollment Showing Which Regular School Its Children Would Attend If They Did Not Attend The Charter School**	**Number Of Poor Children at the Charter School Based on Poverty Percentage of the Regular School They Would Other Wise Attend (A x B=C)**	**Poverty Rate of Charter School (total C divided by total B=D)**
TOTAL FOR CHARTER SCHOOL				

EXAMPLE

Using Proportionality for One Charter School with Students From Multiple Schools in the District

Name of District Sponsored Charter School: New Beginning Charter School

	A	**B**	**C**	**D**
Name Of District School	**Poverty Percent (from Page 2 of the Title I Application)**	**Charter School Enrollment Showing Which Regular School Its Children Would Attend If They Did Not Attend The Charter School**	**Number Of Poor Children at the Charter School Based on Poverty Percentage of the Regular School They Would Other Wise Attend (A x B=C)**	**Poverty Rate of Charter School (total C divided by total B=D)**
Jackson Elementary (K-6)	47.24%	26	12	
Sky Elementary (K-6)	69.98%	50	35	
Jordan Elementary (K-6)	47.14%	43	20	
Hopkins Elementary (K-6)	53.90%	73	39	
TOTAL FOR CHARTER SCHOOL		192	106	**55.21%**

Determination of Poverty Percentage for Charter Schools Using Proportionality

Name of District Sponsored Charter School: _____

	A	B	C	D
Name Of District School	**Poverty Percent (from Page 2 of the Title I Application)**	**Charter School Enrollment Showing Which Regular School Its Children Would Attend If They Did Not Attend The Charter School**	**Number Of Poor Children at the Charter School Based on Poverty Percentage of the Regular School They Would Other Wise Attend (A x B=C)**	**Poverty Rate of Charter School (total C divided by total B=D)**
TOTAL FOR CHARTER SCHOOL				

SAMPLE

Free and Reduced Price School Meals Family Application

Complete one application per household and one application for each foster child.

Part 1. Children in School (Use a separate application for each foster child.)

Names of all children in school (First, Middle Initial, Last)	***School Name***	***Grade***	***Food Stamp (not EBT card #) or TANF Case # (if any)***

Part 2. If the child you are applying for is a homeless, migrant, or a runaway, check the appropriate box and call (school food service contact) at (phone number). Homeless ☐ Migrant ☐ Runaway ☐

Part 3. Foster Child

If this application is for a child who is the legal responsibility of a welfare agency or court, check this box ☐ and then list the amount of the child's personal use monthly income: $_____. Write **"0"** if foster child has no personal use income. Skip to Part 5.

Part 4. Total Household Gross Income—You must tell us how much and how often.

1. Name (List everyone in household.)	2. Last month's income and how often it was received Example: $100/monthly $100/twice a month $100/every other week $100/weekly				**3.** Check if **NO** Income
	Earnings from work before deductions	Welfare, child support, alimony	Pensions, retirement, Social Security	Other	
1.	$_____	$_____	$_____	$_____	
2.	$_____	$_____	$_____	$_____	
3.	$_____	$_____	$_____	$_____	
4.	$_____	$_____	$_____	$_____	
5.	$_____	$_____	$_____	$_____	
6.	$_____	$_____	$_____	$_____	
7.	$_____	$_____	$_____	$_____	

Part 5. Signature and Social Security Number (Adult must sign.)

An adult household member must sign the application. If Part 4 is completed, the adult signing the form must also list his or her Social Security Number or mark the "I do not have a Social Security Number" box. (See Privacy Act Statement in parent letter.)

I certify (promise) that all information on this application is true and that all income is reported. I understand that the school will get Federal funds based on the information I give. I understand that school officials may verify (check) the information. I understand the information provided on this application may be used to verify my household's eligibility for benefits in the National School Lunch Program with Medicaid agencies as part of the state's participation in the Medicaid Verification Study. I understand that if I purposely give false information, my children may lose meal benefits, and I may be prosecuted.

Sign here: x_____ **Print name:** _____

Address: _____ City_____ **Phone Number:** _____

Social Security Number: __ __ __ - __ __ - __ __ __ __ ☐ I do not have a Social Security Number

/Date: _____

Part 6. Children's racial and ethnic identities (optional)

Mark one or more racial identities:

☐ American Indian or Alaska Native ☐ Asian

☐ Black or African American ☐ Native Hawaiian or Other Pacific Islander

☐ White ☐ Other: _____

Mark one ethnic identity:

☐ Hispanic or Latino

☐ Not Hispanic or Latino

Don't fill out this part. This is for school use only.

Annual Income Conversion: Weekly x 52 Every 2 Weeks x 26 Twice A Month x 24 Monthly x 12

Total Income: $_____ **Per:** ☐ Week; ☐ Every 2 Weeks; ☐ Twice a Month; ☐ Month; ☐ Year Household Size: _____

Categorical Eligibility: ____ Date Withdrawn: _____ **Eligibility:** Free___ Reduced___ Denied___ Reason: _____

Temporary: Free _____ Reduced _____ **Time Period:** _____ (expires after _____ days)

Determining Official's Signature: _____ **Date:**_____

Confirming Official's Signature: _____ **Date:** _____

Follow-up Official's Signature: _____ **Date:** _____

INSTRUCTIONS FOR APPLYING

If your household gets FOOD STAMPS or TANF, follow these instructions:

Part 1: List child(ren)'s name, school, grade, and Food Stamp or TANF case number.

Part 2: Check the appropriate box, if any.

Part 3: Skip this part.

Part 4: Skip this part.

Part 5: Sign the form. A Social Security Number is not necessary.

Part 6: Answer this question if you choose to.

Check the appropriate box and contact your school food service director. Fill out application by following instructions for ALL OTHER HOUSEHOLDS.

If you are applying for a FOSTER CHILD, follow these instructions:

Part 1: **Use a separate application for each foster child.** List the child's name, school, and grade.

Part 2: Skip this part.

Part 3: Check the box and list the child's personal use monthly income, if any.

Part 4: Skip this part.

Part 5: Sign the form. A Social Security Number is not necessary.

Part 6: Answer this question if you choose to.

All OTHER HOUSEHOLDS, follow these instructions:

Part 1: List each child's name, school, and grade.

Part 2: Check the appropriate box, if any.

Part 3: Skip this part.

Part 4: Follow these instructions to report total household income from last month.

Column 1-Name: List the first and last name of **each** person living in your household, related or not (such as grandparents, other relatives, or friends). You must include yourself and all children living with you. Attach another sheet of paper if you need to.

Column 2-Gross income last month and how often it was received: Next to each person's name list each type of income received last month and how often it was received. For example, *Earnings from work:* List the gross income each person earned from work. This is not the same as take-home pay. **Gross income is the amount earned before taxes and deductions.** The amount should be listed on your pay stub, or your boss can tell you. Next to the amount, write how often the person got it (weekly, every other week, twice a month, or monthly). *All other income:* List the amount each person got last month from welfare, child support, alimony, (second column) pensions, retirement, Social Security, (third column), and ALL OTHER INCOME SOURCES (fourth column). In the All Other column include Workers' Compensation, unemployment, strike benefits, Supplemental Security Income (SSI), Veteran's benefits (VA benefits), disability benefits, regular contributions from people who do not live in your household, and ANY OTHER INCOME. Report net income for self-owned business, farm, or rental income. Next to the amount, write how often the person got it. If you are in the Military Housing Privatization Initiative do not include this housing allowance.

Column 3-Check if no income: If the person does not have any income, check the box.

Part 5: An adult household member must sign the form and list his or her Social Security Number, or mark the box if he or she doesn't have one.

Part 6: Answer this question if you choose to.

Preschool and Title I

Title I Non-Regulatory Guidance: http://ed.sc.gov/agency/programs-services/77/documents/PreschoolGuidance2012.pdf

Preschool and Title I

Since the enactment of the Elementary and Secondary Education Act (ESEA) in 1965, preschool services to eligible children have been an allowable use of Title I funds. Providing enriching early childhood experiences can help ensure that children in Title I schools and programs have the foundation to meet academic standards and experience success throughout elementary and secondary school. When preschool is high-quality, it may prevent the need for remediation by addressing children's educational needs early. Section 1112(c)(1)(F) of the ESEA requires LEAs and charters, when developing their plans, to provide an assurance that they will take into account the experience of model programs for the educationally disadvantaged, and the findings of relevant scientifically-based research indicating that services may be most effective in the earliest grades at Title I schools.

Funding Preschool Programs

A district may reserve funds (set-aside) to operate Title I preschool programs. Public schools receiving Title I funds may use the school's allocation to operate a Title I preschool program.

A district or school is not required to serve preschool students. Preschool students cannot be included in calculating the allocations to schools. The district may reserve funds in the district set-asides to serve eligible preschool students in the district as a whole or for a portion of the district; or a participating school may use its Title I funds to serve eligible preschool students. A district may not use Title I funds to implement a district wide preschool program to benefit all preschool children in the district unless all the schools in the district are Title I schools operating schoolwide programs. The requirements for a targeted assistance school and a schoolwide program apply to services for preschool students.

South Carolina's preschool education programs are available for all four-year-old children who are eligible for free lunch, all three and four-year-old children with developmental delays and disabilities, regardless of income, and other four-year-old children as placements are available. Title I preschool programs cannot replace those services. Title I preschool programs must supplement the South Carolina preschool programs.

Eligible Students

Eligibility status for Title I Preschool services may be either as a Schoolwide (all children in the attendance area of the school) or as a Targeted Assistance Program for preschool children in the district who are failing or at risk of failing to meet the state's achievement standards.

Preschool children served in a Targeted Assistance Program are selected on the basis of multiple, educationally related and objective criteria established by the district, parent interviews, teacher judgments and developmentally appropriate measures. Family income is allowable for the purpose of prioritizing the children, when Title I funds are limited and not sufficient to serve all eligible children.

Qualifications for Teachers and Paraeducators

By the end of the 2005-06 school years, one hundred percent of core academic teachers were mandated to meet the requirements. The criteria to be considered highly qualified are that teachers hold at least a bachelor's degree, be fully licensed by the state, and demonstrate content knowledge in each subject they teach.

Preschool paraeducators whose duties include instructional support and who work in a program supported with Title I, Part A funds must meet one of the following NCLB requirements –
According to the Title I of the Elementary and Secondary Education Act (ESEA), all instructional paraprofessionals in Title I schools or targeted assistance programs must complete at least one of the following three requirements:

- At least two years of study (60 semester hours) at an accredited institution of higher education; or
- An associate's degree (or higher); or
- An approved state or local academic assessment that measures the paraprofessional's knowledge of and ability to assist in instruction of the following subjects at the appropriate level:
    - reading, writing and mathematics; or
    - reading readiness, writing readiness, and mathematics readiness.

To meet this assessment requirement, paraprofessionals may choose one of the following state approved tests:

- ParaPro Assessment (ETS)

- WorkKeys (ACT).

Standards for Preschool Programs

Title I preschool programs must use a comprehensive, research-based curriculum that is aligned with South Carolina's Early Learning Standards. Title I funded preschool programs must meet Head Start Education Performance Standards.

A district that uses Title I funds to provide preschool programs to low-income children must ensure that those services comply at a minimum with the achievement standards established under section 641A(a) of the Head Start Act. The specific Head Start standards applicable to Title I preschool programs are in

regulations at 45 CFR 1304.21-Education and Early Childhood at the Head Start (Early Childhood Learning and Knowledge Center) website: http://eclkc.ohs.acf.hhs.gov/hslc

The South Carolina Early Childhood Standards document was designed to reflect the range of developmental abilities typical of young children, ages 3-5. The South Carolina Early Childhood Standards are at:
http://ed.sc.gov/agency/programs-services/64/documents/EarlyLearningGoodStart.pdf

Parental Involvement

Parent involvement in the education of children should begin as soon as they start school. Early childhood, preschool, and kindergarten programs that train parents to work with their children at home tend to have significant, positive effects. All provisions of parent involvement that are required for schoolwide and targeted assistance programs are also requirements of a Title I funded preschool except the discussion of school-parent compacts at parent-teacher conferences in elementary schools.

How to Survive a Monitoring Visit

Surviving the Audit

Audit Forms

There are eleven audit forms which are used to monitor an LEA's Title I Program. The forms are:

1. Project Administration
2. Parent Involvement
3. Schoolwide Projects
4. Targeted Assistance Projects
5. District Improvement
6. School Improvement
7. Supportive Services
8. Equipment and Inventory Control
9. Private School Services
10. Budget Monitoring
11. Internal Controls

Please keep in mind that:

- the questions are from Title I requirements
- copies of forms are sent before the audit
- not all forms may be used
- not all questions may apply
- documentation and evidence are usually required
- help is available

Organizing for the Audit

- Determine what forms will be used at your district
- Prepare a folder for each form
- Collect documentation
- Use binder or box to organize folders

Outline of the Auditing Day

8:30 a.m.	Arrive at the D.O.
8:30-12:00	Work at the D.O. with Title I Coordinator
12:00- 1:00	Break for lunch
1:00 - 4:00	Visit school(s)
4:00	Audit Complete

Note: The Times are approximate

Common Problem Areas

- 135 ADM
- March F&R lunch count (SNACS report)
- Counting 3 and/or 4 year olds
- Math errors
- Rounding errors
- Banding errors
- Time and Attendance Records
- Private school contact
- Principal's attestation letter
- Parents Right to Know

- Comparability (if required)
- Maintenance of Effort
- Parent Involvement Policy
- Parent-School Compact
- Survey/evaluation of parent involvement programs
- Targeted assistance student selection process
- Documenting meetings (agenda, sign-in sheet and minutes)
- Getting schools on-board
- Offering parents all that is required by Title I
- Inventory control

Helpful Hints

- Have a Title I meeting at the beginning of the school year
- Use newsletters, newspaper and web to communicate Title I requirements to parents
- Document Title I meetings
- Find a helper (parent coordinator, Title I facilitator, etc.)
- Have a binder or box for documentation to use throughout the year

Help is Available:

Contact

- David Boison
  803-734-0594
  dboison@ed.sc.gov

In addition you can:

- Order free copy of NCLB:
  www.ncela.gwu.edu
- Review guidance:
  www.ed.sc.gov under Title I

Resources

ESEA Waiver
http://ed.sc.gov/agency/lpa/documents/ESEA-Waiver-request-Final-amended-11-29-12.pdf

No Child Left Behind Legislation
http://ed.sc.gov/agency/programs-services/77/documents/titleilegistation.pdf

South Carolina Accountability Workbook
http://ed.sc.gov/agency/programs-services/77/documents/SCAccountabilityPlanJune92010.pdf

Title I Federal Regulations
http://ed.sc.gov/agency/programs-services/77/documents/finaltitleifederalregulations.pdf

Federal Guidance

LEA Identification and Selection of Schools Guidance
http://ed.sc.gov/agency/programs-services/77/documents/LEA_Identification_and_Selection_of_Schools_Guidance.pdf

Annual Assurance Option 2 Form
http://ed.sc.gov/agency/programs-services/77/documents/Annual_Assurance_Option_2_Form.pdf

Annual Assurance Option 3 Form
http://ed.sc.gov/agency/programs-services/77/documents/Annual_Assurance_Option_3_Form.pdf

ARRA - Use of Funds Guidance
http://ed.sc.gov/agency/programs-services/77/documents/ARRA_Use_of_Funds_Guidance.pdf

Circular A 87
http://ed.sc.gov/agency/programs-services/77/documents/Circular_A_87.pdf

Circular A 123
http://ed.sc.gov/agency/programs-services/77/documents/Circular_A_123.pdf

Circular A 133 Audits
http://ed.sc.gov/agency/programs-services/77/documents/Circular_A_133_Audits.pdf

Circular A 133 Supplement
http://ed.sc.gov/agency/programs-services/77/documents/Circular_A_133_Supplement.pdf

Fiscal Guidance
http://ed.sc.gov/agency/programs-services/77/documents/Fiscal_Guidance.pdf

Schoolwide Guidance
http://ed.sc.gov/agency/programs-services/77/documents/Schoolwide_Guidance.pdf

Charter School Guidance
http://ed.sc.gov/agency/programs-services/77/documents/Charter_School_Guidance.pdf

Paraprofessionals Guidance
http://ed.sc.gov/agency/programs-services/77/documents/Paraprofessionals_Guidance.pdf

Parent Involvement Guidance
http://ed.sc.gov/agency/programs-services/77/documents/Parent_Involvement_Guidance.pdf

Private School Guidance
http://ed.sc.gov/agency/programs-services/77/documents/Private_School_Guidance.pdf

Revised Title I ARRA Guidance
http://ed.sc.gov/agency/programs-services/77/documents/Revised_Title_ARRA_Guidance.pdf

School Choice Guidance
http://ed.sc.gov/agency/programs-services/77/documents/School_Choice_Guidance.pdf

School Improvement Guidance
http://ed.sc.gov/agency/programs-services/77/documents/School_Improvement_Guidance.pdf

SES Guidance
http://ed.sc.gov/agency/programs-services/77/documents/SES_Guidance.pdf

Title VI
http://ed.sc.gov/agency/programs-services/91/documents/TitleVIGuidanceRLISProgram.pdf