

Federal Programs

Finance Training

Haley Perez

Tuesday, September 25, 2018





Agenda:

- I. Federal Programs Overview
- II. Goal of Expenditures
- III. Developing Plans
- IV. Submitting Plans
- V. Prior-Approval Process
- VI. 2018-2019 Audits
- VII. Resources

Federal Programs Overview

Title I

- Federal funding for schools to make an impact on school-wide reforms by improving the academic achievement of the disadvantaged.

Title II

- Federal Funding for preparing, training, and recruiting high quality teachers, principals and other school leaders.

Title III/EL

- Language instruction for English Learners and Immigrant Students.

CATE

- Federal Perkins funds are provided to prepare youth and adults for a wide range of high-wage, high-skill, high-demand careers.

IDEA Finance

- IDEA funds are provided to meet the excess costs of providing special education and related services to children with disabilities.

Homeless

- Primary source of federal funding for programs serving people experiencing homelessness.

What is our goal?



Achieving Our Goal



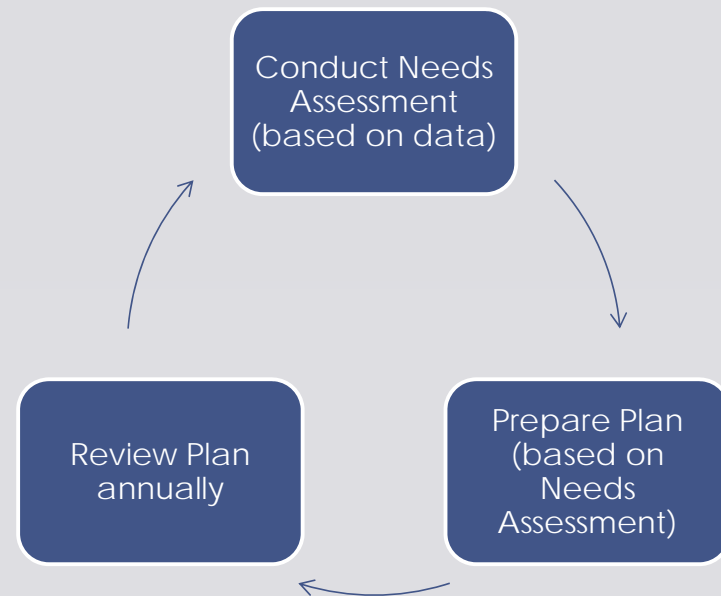
Random Acts
No Needs Assessment


Aligned Acts
Needs Assessment Completed

Achieving Our Goal

There are three components that are essential to effective use of federal funds:


- Conducting a **comprehensive needs assessment** of the entire school,
- Preparing a plan; and
- Annually reviewing the plan.
 - What were the outcomes?





Why is a Comprehensive Needs Assessment Necessary?

- A comprehensive needs assessment is legislated by **Every Student Succeeds Act**.
- To help the school monitor and assess the impact of programs, instruction, and other resources
- Examine multiple sources of data to get a true picture of needs
- Identify strengths and weaknesses and set priorities



Why is a Comprehensive Needs Assessment Necessary?

It is the foundation of the Schoolwide Planning Process.



 **Outcomes!**

Remember...

The ultimate goal of federal fund expenditures is increased student performance...

...and items in the Plan must tie back to your Comprehensive Needs Assessment.





Developing the Plan



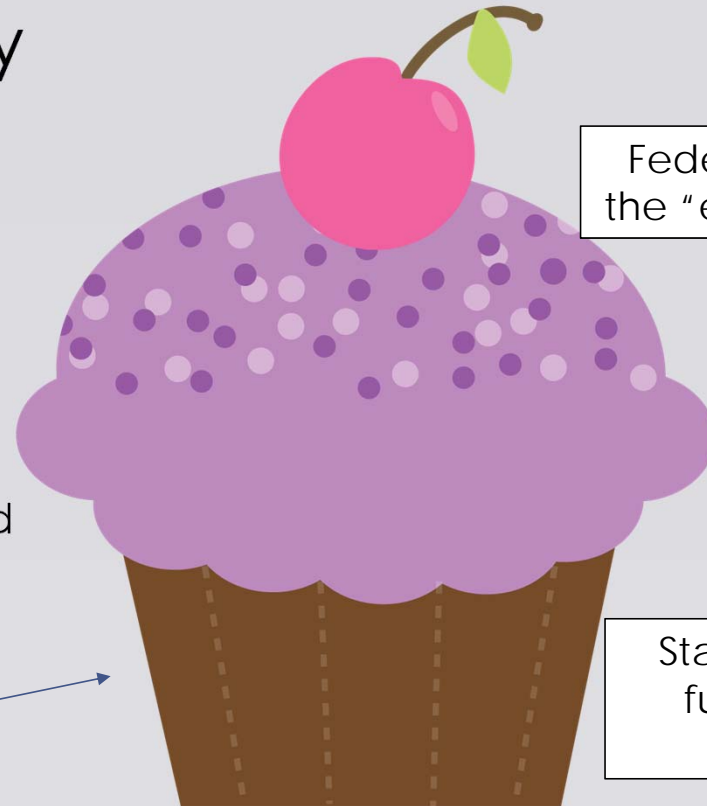
Present state
of school

GAP

Ideal state of
school

Determining Allowability

- Necessary
- Reasonable
- Allocable
- Conform to EDGAR
 - Education Department General Administrative Regulations
- Meet Terms and Conditions in Grant Award
- Consistent with State and Local policies
- Provided Consistent Treatment
- Adequately documented
- **Supplemental**



Federal Funds are the "extra toppings"

State and Local funds are the "cake"



Questions to Ponder...



- How does this expenditure directly support student achievement for at-risk students?
- How does this expenditure directly support meaningful professional development?
- How does this expenditure increase the participation of parents in school activities or assist parents to support student achievement?
- **How does this expenditure supplement state and local funds?**
- **How does this expenditure foster continuous improvement and evaluate activities to modify or discontinue?**




Allowable vs. Non-Allowable

Allowable

- Salaries and Benefits
 - To reduce class size or provide remediation services
- Professional Development
 - Conference Attendance or bringing in a speaker/consultant
- Instructional Supplies or Materials
 - Purchasing supplemental programs, materials, etc.
- Family Engagement Activities
- Extended Day Programs
- Student Incentives

Non-Allowable

- Entertainment Costs
- Some Field Trips
 - Amusement Park, Fair, etc.
- Gift Certificates/Gift Cards



Why can it take so long for our plan to be approved?



- Planning Meeting
- Late plan submission
- Comprehensive Needs Assessment lacks detail
- Expenditure activities do not tie back to Needs Assessment
- Expenditure activities are written with limited detail



Submitting Plans:
New SCDE System

GEMS
Grant Electronic Management System

As of now, schools do not need to gain access to GEMS or Member Center.

GEMS

Budget Detail

Narrative Description

Function: 100 - Instruction

Object: 100 - Salaries

Reform Strategy: Select Tag
(Select at least 1 tag(s))

Use of Funds: Select Tag
(Select at least 1 tag(s))

Identified Need: Select Tag
(Select at least 1 tag(s))

Data that Need is Based On: Select Tag
(Select at least 1 tag(s))


LEA / School: 4801-The Charter Institute at Erskine (4801)

Quantity: 1.00

Cost: \$0.00

Budget Detail Total: \$0.00

0 of 2000 characters



Submitting Your Plans

[Formstack](#)
[Plan Submissions](#)

Charter Institute at Erskine

Title I Plan Submission

2018-2019

School Name: *

Email

You will receive an email with all the information submitted if you enter your email address.

Add Activity:

Select Function: *

Select Object: *

Select Reform Strategy: *

Must select one.

Select Use of Funds: *

Select Identified Need: *

Select Data that Need is Based On: *

Must select one.

Must select one.

Activity: *

Quantity: *

Cost: *

Total Cost:

This automatically multiplies the quantity by the cost.

Do you have another activity to add?

Yes No



Pre-Approval

Formstack
Prior-Approval

Charter Institute at Erskine
Federal Programs Prior-Approval



Activity:

Activity as Written in Plan:

Job Description

 No file chosen

Salary Split

 No file chosen

Do you have another activity to add?

- Yes
- No



Title I
Audit

IDEA
Audit



Resources

Our website is regularly updated with resources.

<https://erskinecharters.org/>



Federal Programs Training

- Monday, October 15, 2018
- 1201 Main Street Columbia, SC (3rd Floor Conference Room)
- Topics: Title I, Title II, CATE, IDEA, Homeless/Foster Care, Amendments

- Registration link is in Institute Insights and on Training Calendar

<https://tinyurl.com/instituteinsights>

<https://tinyurl.com/institutetrainingcalendar>



Please reach out to the Office of
Federal Programs with any questions
or concerns.

Haley Perez

federalprograms@erskinecharters.org

803-849-2461

